

**SIERRA CLUB  
SAN DIEGO CHAPTER  
OUTINGS POLICY**

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## TABLE OF CONTENTS

1. PURPOSE.....	2
1.1. OBJECTIVES.....	2
2. GENERAL POLICY STATEMENTS.....	3
2.1. APPLICATION AND POLICY DEFINITIONS.....	3
2.1.1. Application.....	3
2.3. OUTINGS COMMITTEE.....	4
2.4. LEADERSHIP REVIEW AND SAFETY COMMITTEE (LRSC).....	5
2.5. POLICY MODIFICATION.....	5
2.6. ADDITIONAL OUTINGS CRITERIA.....	5
3. MEETINGS.....	7
3.1. OUTINGS COMMITTEE MEETINGS.....	7
4. FINANCES.....	8
4.1. OUTINGS ACCOUNT.....	8
4.2. OUTING COSTS.....	8
4.3. PUBLICATION OF OUTING COSTS.....	9
4.4. OUTING DEPOSITS.....	9
4.5. FUND RAISING.....	10
4.6. OUTING FEE REDUCTIONS.....	10
5. OUTINGS REQUIREMENTS.....	11
5.1. APPROVAL.....	11
5.2. CANCELLATION OR MODIFICATION.....	11
6. OUTING TYPES.....	16
6.1. GRADING.....	16
7. CHAPTER OUTINGS LEADER (COL) RATINGS.....	17
7.1. GENERAL.....	17
7.2. EVALUATION OUTING.....	17
7.3. COL REQUIREMENTS.....	18
7.4. SPECIAL RATINGS.....	19
7.5. RECORDS.....	19
7.6. MAINTAINING RATING.....	19
7.7. ALTERNATE APPROVAL.....	21
7.8. GRIEVANCE PROCEDURES.....	21
APPENDIX A OUTINGS POLICY GRIEVANCE PROCEDURES.....	1
APPENDIX B OUTINGS POLICY SUMMARY.....	1
APPENDIX C OUTINGS COMMITTEE JOB DESCRIPTIONS.....	1
APPENDIX D GROUP SIGN-IN SHEET / LIABILITY WAIVER.....	1
APPENDIX E INCIDENT REPORT FORM AND INSTRUCTIONS.....	1
APPENDIX F MINOR RELEASE FORM.....	1

**SIERRA CLUB  
SAN DIEGO CHAPTER  
OUTINGS POLICY**

**1. PURPOSE**

**1.1. OBJECTIVES**

- 1.1.1. To enhance participants' enjoyment of the natural environment.
- 1.1.2. To educate members on the need for reduced impact on the natural environment and to demonstrate techniques for displaying good outdoor manners.
- 1.1.3. To recruit and educate new Club members.
- 1.1.4. To encourage Club leaders to share knowledge of the Club's conservation activities and philosophy.
- 1.1.5. To identify and develop potential Club leaders.
- 1.1.6. To strengthen ties within the Club's Chapters and Groups.
- 1.1.7. To enable members to become familiar with specific areas so they will be motivated to preserve natural values.
- 1.1.8. To create a constituency to save specific areas and develop members' credibility to speak from personal experience as advocates for preservation.

## 2. GENERAL POLICY STATEMENTS

### 2.1. APPLICATION AND POLICY DEFINITIONS

2.1.1. Application — This policy applies to all outings carried out in the name of the San Diego Chapter and all Chapter units.

#### 2.1.2. Policy Definitions

2.1.2.1. **Chapter**- The San Diego Chapter of the Sierra Club

2.1.2.2. **Chapter Outing Leader Website** – A website maintained by the Outings Committee designed to deliver Chapter and Club material to the COLs, and host the Leader Database. As of the date of this policy, the URL is [www.sierraleaderssd.net](http://www.sierraleaderssd.net).

2.1.2.3. **Club**- The Sierra Club

2.1.2.4. **COL**- San Diego Chapter Outings Leader, See Section 7

2.1.2.5. **ExCom**- The Executive Committee of the San Diego Chapter

2.1.2.6. **Leader Database** – The official Chapter database containing leader details and the Master Calendar.

2.1.2.7. **LRSC**- Leadership Review and Safety Committee, See Section 2.4

2.1.2.8. **LTC**- Leadership Training Coordinator

2.1.2.9. **Master Calendar** – The official record of outings led by Club COLs.

2.1.2.10. **OLT** – Outings Leader Training

2.1.2.11. **Outing**- See Section 2.2

2.1.2.12. **Backcountry Outing** – Any outing where participants will be more than one hour from emergency services.

2.1.2.13. **Outings Leader Extranet Site** – An Internet site maintained by the National Sierra Club. Contains information regarding all National Sierra Club outings policies. Currently at <https://community.sierraclub.org/section/outings/outings-wide-resources-policies/policies>. This site is the only location where the most recent version of the Sierra Club Outings Leader Handbook and the latest versions of all National policies and forms/waivers can be found. Additionally there are training modules here useful for COLs. This site is password protected. All COLs should be able to get their own account and password, by contacting the chapter office.

### 2.2. OUTINGS DEFINITION

2.2.1. An outing is a sanctioned Sierra Club activity in which a significant component is to take participants into the out-of-doors and meets one or more of the following criteria:

2.2.1.1. It is conducted as a group activity in which participants cannot readily come and go as they please (must sign out and may need to be accompanied back to the trailhead) or on which missing persons would be the Club's responsibility.

2.2.1.2. It occurs in places where public emergency services cannot be obtained as quickly as in an urban area.

2.2.1.3. Group safety is dependent on the competent leadership and emergency performance of the leader.

2.2.1.3.1. Sierra Club sponsored bicycle rides are considered outings for the purpose of this policy.

2.2.1.4. Urban outings such as beach clean-ups or walks occurring primarily on paved surfaces are considered activities rather than outings.

2.2.2. Restricted Outings include, but may not be limited to outings that require the use of specialized gear such as ice axes, crampons, ropes, watercraft, or foreign travel or challenge courses. The list of such activities and additional Sierra Club requirements are documented on the National Sierra Club website at <https://community.sierraclub.org/section/outings/outings-wide-resources-policies/policies>. Such activities are defined and governed by the policies of the Club. To publish these outings on the chapter website they must be coordinated with the Outings chair or section chair to ensure correct policies are being followed.

2.2.2.1.

2.2.3. *Inspiring Connections Outdoors (ICO)* is a program conducted entirely outside of San Diego Chapter oversight. ICO is defined and governed solely by the policies of the National Sierra Club.

### **2.3. OUTINGS COMMITTEE**

2.3.1. The Outings Committee is the governing body for the chapter's outings program. Members of the Outings Committee function as described in Appendix C.

2.3.2. Outings Committee member term limits only apply to the following positions:

2.3.2.1. The individual filling the outings chair position shall serve a term not to exceed three years.

- 2.3.2.2. Members-at-Large shall be appointed by the outings chair and approved by the Outings Committee for a two-year term.

## **2.4. LEADERSHIP REVIEW AND SAFETY COMMITTEE (LRSC)**

The Leadership Review and Safety Committee is a subcommittee of the Outings Committee, and is responsible for directing the COL training, reviewing COL ratings, and hearing outings grievances. Members of the LRSC shall be composed of at least the following individuals: LRSC Chair, Outings Chair, San Diego Wilderness Basics Course (WBC) Representative, North County WBC Representative, ExCom Representative, San Diego Leadership Training Coordinator, North County Leadership Training Coordinator, and one or more COLs with extensive outings or other applicable leadership experience.

## **2.5. POLICY MODIFICATION**

- 2.5.1. Any member of the Outings Committee can submit a proposed change to the outings policy at any time. Any COL can submit a proposed change to the outings policy, but only via their section representative or a member-at-large.
- 2.5.2. Proposed changes to the outings policy shall be submitted to the Outings Committee chair via email as an agenda item for the next meeting of the Outings Committee. When submitting a proposal, include all committee members as info addressees (i.e., Cc them).
- 2.5.3. The Outings Committee shall vote on proposed changes as soon as they are submitted. If further review is necessary, then deferral to the next meeting is acceptable. However, the committee shall adjudicate proposed changes as quickly as possible.
- 2.5.4. Approved changes to the outings policy (except as noted in paragraph 2.5.5) shall be kept in abeyance and do not become effective until a date determined by the Outings Committee, when an updated version of the outings policy shall be issued. Updates to the outings policy shall not occur more frequently than once per year.
- 2.5.5. Approved changes that affect participant safety, club liability, or COL requirements and ratings become effective immediately and shall be issued immediately as an advance notice (i.e., as an interim change).
- 2.5.6. The Outings Committee may waive or alter any portion of this policy deemed necessary if in keeping with chapter and Sierra Club policies.

## **2.6. ADDITIONAL OUTINGS CRITERIA**

Chapter units (e.g., Bicycle Section) may establish additional outings criteria through the Outings Committee, consistent with club and chapter policies. These current policies are provided in Appendix G.

## **2.7. POLICY CONFLICT**



The intention of this policy is to conform to Club and chapter policy. In cases of policy conflict, the more limiting policy shall apply.

## **2.8. POLICY WAIVER**

- 2.8.1.1. Any chapter member can submit a request to waive policy requirements at any time.
- 2.8.1.2. Waiver requests must be submitted via email to the LRSC Chair.
- 2.8.1.3. At its discretion, the LRSC Chair either declines the request or forwards it to all LRSC members.
- 2.8.1.4. Waiver approvals require affirmative vote of a majority of its members.
- 2.8.1.5. Approved waivers must be reported to the Outings Committee no later than its next meeting.

### 3. MEETINGS

#### 3.1. OUTINGS COMMITTEE MEETINGS

- 3.1.1. *Regular Meetings*—Outings Committee meetings shall be held at times and places the Outings Committee specifies, but not less often than four times per year. A quorum to conduct business at these meetings shall be a majority of the then-current Outings Committee membership.
- 3.1.2. *Meeting Notification*—Notice of meetings shall be given to the Outings Committee members by publication in the Hi Sierran, the COL Newsletter, or by personal mail.
- 3.1.3. *Special Meetings*—The outings chair may convene special meetings by giving notice to the membership stating the time, place and purpose of the meeting, and with an advanced notice of not less than fourteen days. The conduct of special meetings shall be in the same manner as regular meetings.

## 4. FINANCES

### 4.1. OUTINGS ACCOUNT

- 4.1.1. Account Maintenance -- The outings treasurer maintains the outings account for Outings Committee expenses.
- 4.1.1.1. The Outings Committee account should be in the name of the Outings Committee/San Diego Chapter/Sierra Club and have the following Sierra Club federal ID number: TIN 94-1153307.
  - 4.1.1.2. The outings account must be authorized by the chapter ExCom.
  - 4.1.1.3. All moneys received for the Outings Committee should be promptly recorded and deposited by the treasurer in an appropriate account.
  - 4.1.1.4. The prudent reserve balance is \$10,000. This represents the minimum balance required to meet reasonably anticipated Outings Committee expenses. Excess funds will be remitted to the San Diego Chapter on no less than an annual basis.
  - 4.1.1.5. The outings chair, the outings treasurer, and one other outings committee member shall be authorized signatories to the outings account.
  - 4.1.1.6. All disbursements must be supported by documentation.
  - 4.1.1.7. Any donations to non-Sierra Club organizations must have ExCom approval.
  - 4.1.1.8. A combined "cash journal," listing both receipts and disbursements, is required with a quarterly reconciliation.
  - 4.1.1.9. The outings treasurer shall comply with all club and chapter accounting requirements.
- 4.1.2. Account Reporting --
- 4.1.2.1. Outings Committee will maintain their financial record keeping within the same accounting program utilized by the San Diego chapter.
  - 4.1.2.2. Quarterly financial reports are to be current and made available to the outings chair and chapter treasurer within fifteen days of the end of each calendar quarter: December 31; March 31; June 30; and September 30.
  - 4.1.2.3. An annual written budget for the coming year must be made to the Outings Committee and also to the chapter treasurer by the end of the fiscal year: December 31.

### 4.2. OUTING COSTS

Outing costs shall be published with the outing write-up. Costs collectable from participants may include food, consumables, concessionaire fees, and other costs approved by the Outings Committee. (See 4.3.2) Collections from participants should not exceed reasonably anticipated direct field costs.

### 4.3. PUBLICATION OF OUTING COSTS

4.3.1. California has a "Seller of Travel" law whose purpose is to protect consumers from unscrupulous travel agencies and tour operators. **All Sierra Club outings and activities nation-wide, regardless of whether fees are charged or not**, (referred to as "outings" for simplicity) are subject to the California Seller of Travel law. Requirements of this law include:

- 4.3.1.1. Establishment of a Separate Bank Account. All money collected for any outing must be deposited directly into a separate bank account. For practical purposes, even though all outings that charge money are subject to the separate bank account requirement, the Club has set a materiality threshold and only outings charging more than \$50 per person must adhere to the separate bank account requirement.
  - 4.3.1.2. Travel Confirmation. If air or sea transportation is provided as part of the outing, tickets or equivalent travel confirmations must be sent to the participant within three business days of full payment.
  - 4.3.1.3. Inclusion of the Club's Seller of Travel number in Marketing and Advertising. All outing marketing and advertising materials must include the Club's Seller of Travel identification number by simply adding "CST 2087766-40. Registration as a seller of travel does not constitute approval by the State of California." This requirement pertains to print, email, and web marketing and advertising.
- 4.3.2. Outing Fee -- All outings charging a fee must state so in the outing announcement. The announcement must also indicate:
- 4.3.2.1. The estimated total costs of the outing (not to include typical individual outing expenses such as carpooling costs, etc. See 4.2).
  - 4.3.2.2. To whom payments are to be made (See 4.4.1 & 4.4.2).
  - 4.3.2.3. Where any excess funds will be deposited (See also 4.5).
  - 4.3.2.4. The applicable outing refund policy (See 4.4.3 & 4.4.4).
- 4.3.3. Outings Announcement Non-compliance -- Outings submissions, which do not comply with 4.3 will not be placed on the master calendar.

### 4.4. OUTING DEPOSITS

4.4.1. Cost reimbursements to Individual Accounts – Upon approval of the outings submission, fund reimbursements of not greater than \$50 per outing participant (or a total collected sum of \$500) may be made out to an individual Sierra Club leader or member. The individual shall be responsible for keeping detailed and clear records of moneys received, noting from whom, for what, dates received, check numbers, and related deposit information. In addition, a record must be maintained of expenditures, noting items, costs, and other pertinent data. Any funds collected in excess of the costs of the outing must

be submitted to a Sierra Club Chapter account. All records should be kept by the individual for three years and are subject to review at the request of the chapter ExCom, the Outings Committee, or their appointed representative.

4.4.2. Deposits to Sierra Club Accounts – Fund requests in excess of \$50 per outing participant (or a total collected sum greater than \$500) must be made out to an approved chapter account, e.g., Bike Section, San Diego Chapter – Sierra Club; Sierra Club Bus Trips; etc. Information concerning how to establish such an account may be acquired from the outings or ExCom treasurer.

4.4.2.1. Refundable Reservation Deposits – A “refundable reservation deposit” may be requested at the leader’s discretion or where required by the local land use agency or authority. These deposits will be returned to the outing participants except as specified in 4.4.5.

4.4.2.2. Non-refundable Reservation Deposits -- Some outings may have a “non- refundable reservation deposit” that is part of the outing cost. However, if a person is not accepted on an outing the deposit must be refunded.

4.4.2.3. Deposit Forfeits -- Deposits may be forfeited for a late cancellation or for failure to appear at the starting point as described in the outing write-up. These deposits shall go into an appropriate approved chapter account.

#### **4.5. FUND RAISING**

4.5.1. Chapter and Chapter Entity Fund Raising -- An outing used as a chapter, section, group or other chapter entity fund raising venture must be advertised as such, and all participants made aware of its purpose. The leader of such an outing must ensure that a complete record of receipts and disbursements is kept, and that such records and surplus funds are promptly deposited in a chapter approved bank account. It is the responsibility of the section, group or leader to verify that any fund raising event is expressly permitted by local land use agencies or other authorities.

4.5.2. Non-Chapter Fund Raising -- Fund raising outings for other than chapter purposes must be approved by the chapter ExCom.

#### **4.6. OUTING FEE REDUCTIONS**

Coordinators, leaders, assistant leaders and other staff on chapter outings, may go at a reduced charge or no charge as determined by the sponsoring chapter entity subject to any restrictions by local land use agencies or authorities.

## 5. OUTINGS REQUIREMENTS

### 5.1. APPROVAL

5.1.1. Before an outing takes place, it must meet the following requirements:

5.1.1.1. Acceptance -- The Master Calendar Coordinator or group/section/committee outings coordinator must review, or cause to be reviewed, the proposed outing for conformance to chapter and outings policies. This review may take place electronically with sufficient programming controls in place to reasonably ensure compliance with this outings policy. Leaders/coordinators are responsible for entering their outings into the Leader Database and Master Calendar via the Chapter Outing Leader website. Such entry will cause an automated review of leader currency to take place.

- Backcountry Safety Management Plan – For any outing where at any point, participants are expected to be more than 1 hour from emergency services, a safety management plan must be completed. (<https://community.sierraclub.org/file/11085/download/Local%2520Outings%2520Multiday%2520and%2520Backcountry%2520Safety%2520Management%2520Plan.pdf>) This plan must be submitted to the Outings Chair sufficiently in advance of the outing for review.

5.1.1.2. Outing Announcement -- The outing must be publicized. The description must include the leader's/coordinator's name, email or phone number; and the outing date(s) and cost, if any, grade and general description; and should include maximum number of participants, any prerequisites for participants (experience, conditioning, etc) and assistant's name, if applicable and known. Publication must be via a medium officially sanctioned by a San Diego Chapter entity. Examples are: San Diego Sierra Club website, San Diego Sierra Club meetup site, any official Sierra Club events or meetings, the Web including social media sites, e-mail, listserve, or newsletter. Regardless of means of publication, the leader / coordinator is responsible for entry of the outing into the Leader Database and Master Calendar via the Chapter Outing Leader website.

5.1.2. Master Calendar -- An accepted outing must be entered on a permanent official record known as the Master Calendar before the outing begins. The Master Calendar will be updated automatically upon electronic acceptance and maintenance of the outing through the Chapter Outing Leader Website.

### 5.2. CANCELLATION OR MODIFICATION

5.2.1. Reasons -- Outings must be modified or canceled if any condition emerges that would make them unsafe. Outings may be canceled due to illness, a personal emergency of the leader, bad weather, lack of sufficient participants, etc. The leader shall immediately update their outing entry in the Leader Database and Master Calendar and notify participants upon cancellation or modification of an outing.

5.2.2. *Modification* -- Significant modifications to an outing (e.g. duration, elevation gain, terrain) should be documented in the Master Calendar via entry through the Chapter Outing Leader website.

### 5.3. LEADERS

5.3.1. *Authority* -- The leader has full and final authority in deciding who is qualified for the offered outing (see 5.4.1), and over all outing matters once the outing has begun. Outing participants may be excused or dismissed at the leader's discretion. Whenever possible, participants should not be allowed to leave the outing alone.

5.3.2. *Obligation* – COLs are obligated on chapter outings to:

- 5.3.2.1. Be current with their rating requirements. See Section 7.3
- 5.3.2.2. Be familiar with outings guidelines in the chapter outings policy, and changes to national's outings policy as communicated by the chapter Outings Committee.
- 5.3.2.3. Complete a safety management plan to include emergency evacuation routes and emergency resource contacts and after review by Outings Chair, carry copy during the outing.
- 5.3.2.4. Evaluate participants based upon their ability to participate safely and without fundamentally changing the nature of the activity.
- 5.3.2.5. Inform participants of outings policy requirements (see Appendix B).
- 5.3.2.6. Have reviewed participant medical forms and ensure copies are carried during backcountry outing.
- 5.3.2.7. Ensure that all participants have satisfactorily completed and signed the Sierra Club Sign-In and Participant Agreement before the outing begins. This form is included as a link in Appendix D to the outings policy document. If there is minor (persons under 18 years old) participation in an outing, see 5.4.2 for additional requirements (and Appendix F for Minor Release Form).
- 5.3.2.8. Remind/educate participants concerning proper wilderness ethics applicable to the outing (e.g., trail cutting, personal sanitation, low impact camping, trash removal, Leave No Trace);
- 5.3.2.9. When appropriate, inform participants of club procedures concerning lost participants;
- 5.3.2.10. Carry adequate first aid and other equipment for emergency situations;
- 5.3.2.11. Fulfill the role of "front marker" or "back marker" or designate another outings leader or a capable and trustworthy participant to fill such roles. The front marker keeps track of the route and sets an appropriate pace. The back marker brings up the rear and ensures that no participant is left behind. See Section 5.3.3 for further guidance on assistant leaders.

- 5.3.2.12. Conduct the outing in a safe and proper manner, seeing that all participants are safely accounted for at the conclusion of the outing.
- 5.3.2.13. Return Medical Forms required for backcountry outings to participants.
- 5.3.2.14. Submit, by mail or electronically, any and all signed sign-in forms, acknowledgement of risk forms to the chair of the sponsoring section or the Chapter's Outings Chair. These documents must be kept on file by the San Diego Chapter for at least six and a half years.

5.3.3. Assistant Leaders -- All Restricted and Type II outings require an assistant leader. The assistant leader shall have the responsibility and authority delegated by the leader and shall assume responsibility if the leader is incapacitated. Restricted and Type II outings require an assistant rating of level COL I or greater. This requirement for Type II outings may be waived, in very rare circumstances, for a specific Type II outing upon review by the Leadership Review and Safety Committee.

- 5.3.3.1. *The leader of **any** outing is strongly encouraged, even if not required, to recruit another COL to act as an assistant leader.* This is especially true if the maximum travel time required to report an emergency is greater than one hour. In such instances, the assistant should be a COL or a COL trainee with basic first aid, or its equivalent.

## 5.4. PARTICIPANTS

- 5.4.1. Possible Participants -- Chapter outings are open to anyone who qualifies (members and non-members). Qualification shall be based on the outings requirements such as equipment, physical condition, experience and related outing safety factors, and leader discretion.
- 5.4.2. Minors (persons under 18 years old) -- If accompanied by a parent or guardian: the parent or guardian must sign the liability waiver on behalf of the minor, prior to outing start. The minor cannot sign the waiver form. If unaccompanied by a parent or guardian: same as above. ADDITIONALLY, the parent or guardian must also sign the Minor Release Form (see Appendix F), and provide the form to the leader prior to outing start.

## 5.5. SIGN-UP AND ANNOUNCEMENTS

- 5.5.1. A Group Sign-Up Sheet/Liability Waiver shall be used on all outings. All sign-up sheets will be forwarded to the Chair of the Outings Committee for chapter insurance purposes following the completion of the outing (electronic copies are preferred). Leaders should also retain a copy for a minimum of seven years. Sign-ups shall not be taken before publication of the outing (see 5.1). Outing members will be selected from those considered qualified by the leader in the order in which they apply, or via a lottery with a specified lottery date. Sign-up may be restricted, or preference given to members of the sponsoring unit, if so announced.

## 5.6. LIMITATIONS AND RESTRICTIONS



5.6.1. Group Size -- The number of participants must not exceed the carrying capacity of the area visited. Additionally:

5.6.1.1. Backpack outings may not have more than 15 people including the leaders.

- 5.6.1.2. All other outings may not have more than 25 people including the leaders. A leader anticipating more than this number should require reservations or provide additional leaders so the group may be split.
- 5.6.1.3. Under special circumstances these limits may be exceeded with advanced approval of the outings chair.
- 5.6.1.4. In cases where outings policy group size limits conflict with limits established by any agency charged with protecting the outing location, the more restrictive group size limit shall prevail.
- 5.6.2. Duration -- An outing begins and ends at designated points, usually the trail head and trail end. Outings shall not last over ten days without approval of the club's board of directors.
- 5.6.3. Locations -- COLs should be aware of National Sierra Club guidelines found within the Outings Leaders Extranet Site (<https://community.sierraclub.org/section/org-wide-resources/safety-risk-management/policies-procedures-all-sierra-club-activities-events-and-outings>) concerning outings located outside the chapter area.
  - 5.6.3.1. The chapter discourages outings scheduled under conditions of time and distance that invite unsafe transportation arrangements.
  - 5.6.3.2. Generally, outings shall be confined to California, Nevada, Arizona and Southern Utah.
  - 5.6.3.3. Foreign outings require special insurance and/or club approval. (See 5.1.3)
- 5.6.4. Private Property – Outings where private property will be crossed necessitate owner permission. Such permission may require the use of such club forms as CERTIFICATE OF INSURANCE REQUEST FORM or the LIMITED RELEASE FORM. Contact the outings chair for further information.
- 5.6.5. Prohibitions – Club, chapter, and outings policy prohibit the following on outings:
  - 5.6.5.1. Firearms are prohibited, and electrical sound generating apparatus is discouraged. Leaders and participants may utilize communication devices for weather or outing-related purposes.
  - 5.6.5.2. Pets are only permitted where legally permissible and when specifically noted in the outing announcement. Service animals are permitted provided the Club policies are followed which include that the leader is notified in advance, the animal is trained and registered, and the land agency allows it. See Club policy if dealing with a service animal. (<https://community.sierraclub.org/page/service-animal-and-emotional-support-animal-guidelines-outings-events-activities>)
  - 5.6.5.3. Outings whose purpose includes any activities inconsistent with the goals of the club.
  - 5.6.5.4. Alcohol and drug use must follow the Club's policies. Leaders may designate trips as alcohol and drug free. Leaders must follow legal limits to avoid intoxication. There is no use allowed when minors are present without their guardians. (<https://community.sierraclub.org/section/org-wide-resources/safety-risk-management/policies-procedures-all-sierra-club-activities-events->

[and-outings/safety-policies-forms](#)). Use of marijuana is not permitted on Federal lands.

5.6.6. *Harassment* -- Psychological or physical harassment by any COL or outing participant of others during an outing shall not be tolerated. Incidence of such harassment should be reported to a member of the LRSC. The LRSC shall respond to such charges as prescribed in the outings policy grievance procedures (APPENDIX A).

## 5.7. TRANSPORTATION

- 5.7.1. Energy Conservation -- Transportation arrangements minimizing pollution and energy consumption are encouraged.
- 5.7.2. Private Transportation -- Transportation to the meeting point or trail head is the private concern of the participants.
- 5.7.2.1. Participants shall be informed by the leader that the club does not assume responsibility or liability regarding transportation arrangements.
- 5.7.2.2. Leaders should encourage carpooling but shall not make assignments or assume any responsibility, expressly or implicitly, which could be construed as acting for the chapter or club.
- 5.7.2.3. Drivers should be reminded that they assume full liability for themselves and their passengers.
- 5.7.3. Rented or Leased Transportation -- Individual outing members may use rented or leased vehicles as their private vehicles to carpool to an outing. COLs planning to use such transportation should contact the outings chair for club guidelines and refer to included link which specifies how rental is titled and insurance requirements. (<https://community.sierraclub.org/page/transportation>)
- 5.7.4. Chartered Bus Transportation -- All bus charters must be approved by the bus trip chair. They must meet the requirements of the club, the club's insurance carrier and all regulatory agencies (CHP, ICC, etc.). Only professional, licensed drivers employed by the carrier can be used.
- 5.7.5. Watercraft and Aircraft -- The leader must contact the outings chair for current club policy regarding the use of these forms of transportation. (<https://community.sierraclub.org/page/aircraft-charters-0> and <https://community.sierraclub.org/page/watercraft-policies>)

## 5.8. INCIDENTS

- 5.8.1. Definitions -- Outing "incident." According to the SIERRA CLUB INCIDENT REPORT form (included as Appendix E to this outings policy document), an incident report must be filed for: 1) any incident that requires search, rescue or evacuation, 2) any injury that requires advanced first aid, 3) any injury or illness that could have future complications (i.e. animal bite, severe sprain, etc.), 4) all illnesses or injuries that require medical attention after the outing, 5) lost participants, or 6) incidents in which outings participants help an injured person who is not a member of their party.
- 5.8.2. Reporting -- In case of an "incident," leaders shall comply promptly with all club reporting requirements, including calling 888-OUTINGS for serious events (after emergency responders). These requirements are stated in the Instructions included with the Sierra Club Incident Report form (See Appendix E). Also report the incident to the Chapter director and LRSC chair.
- 5.8.3. Emergency Costs -- Participants shall be informed before the outing that the costs of emergency rescue, evacuation and medical care are the private responsibility and liability of the individuals benefited. A leader or authorized

assistant, acting in good faith and with ordinary and reasonable prudence, should arrange for such assistance for an outing participant

## 6. OUTING TYPES

### 6.1 GRADING

6.1.1. Outings are based upon several factors and are grouped into two categories: Type I outings and Type II outings.

6.1.2. TABLE 1

**GUIDELINE CRITERIA FOR DETERMINING OUTING TYPE**

	TYPE I	TYPE II
<b>General Description</b>	Day outing or car camp	Backpack or any overnight stay away from cars
<b>COL Rating</b>	COL I	COL II
<b>Terrain Classes (see definitions below)</b>	1 <sup>st</sup> or 2 <sup>nd</sup> Class, easy 3 <sup>rd</sup> Class**	1 <sup>st</sup> or 2 <sup>nd</sup> Class, easy 3 <sup>rd</sup> Class**
<b>Assistants</b>	Strongly encouraged by not required	COL I or II assistant in good standing required

\*\*Where safety does not require ropes, ice axes, or technical climbing equipment.

6.2.1. The terrain class indicates the difficulty of the route. The classes are:

6.2.1.1. Class 1. Hands-in-pockets hiking on trails or easy cross-country.

6.2.1.2. Class 2. Rough cross-country travel, boulder hopping and possible use of hands for balance.

6.2.1.3. Class 3. Handholds are necessary for climbing. Some people may ask for belays (rope assistance). Easy class 3 involves limited periods where handholds are necessary, and ropes are not needed.

6.2.1.4. Class 4 and above. More difficult climbing with considerable exposure. Ropes are required. Not approved for chapter outings except for the mountaineering section. Subject to approval by the Mountaineering Committee.

## 7. CHAPTER OUTINGS LEADER (COL) RATINGS

### 7.1. GENERAL

- 7.1.1. *Minimum COL Rating* -- A COL I can only lead Type I outings. A COL II can lead Type I and II outings. See Section 6.
- 7.1.2. *Exceptions* -- Exceptions to section 7.1.1 include:
  - 7.1.2.1. Leaders on an evaluation outing.
  - 7.1.2.2. The LRSC chair or person designated by LRSC may allow an outing to be led or assisted by a leader with a rating less than required by the outing type based upon the Chair's judgment of the leader, the outing, and the assistant leader, if any.

### 7.2. EVALUATION OUTING

- 7.2.1. Leader being evaluated is the leader-of-record on the master calendar.
- 7.2.2. Evaluation outing must be published at least 2 weeks before the outing is to take place.
- 7.2.3. Each evaluation outing must be observed by a qualified evaluator who has not previously evaluated the candidate.
- 7.2.4. Qualified evaluators must be San Diego Chapter outings leaders current in all requirements for leadership at the rating to be evaluated. They must hold at least the rating for which they are evaluating. To be an evaluator, a COL must have completed 6 outings including their own evaluation hikes and been a COL for at least a year. To evaluate a COL II outing the evaluator must have lead at least 3 level 2 outings.
- 7.2.5. Evaluation outings should be typical of the outing the candidate intends to lead in the future.
- 7.2.6. An assistant is required for COL-I evaluation outings.
  - 7.2.6.1. A COL trainee may assist COL-I evaluation outings.
- 7.2.7. Evaluation outings must be composed of at least six individuals, including the leader, the assistant, and the evaluator. The evaluator cannot be the assistant.
- 7.2.8. Evaluations must be submitted on a form approved by the Leadership Review and Safety Committee (LRSC).
- 7.2.9. Rating approval will be given by either the San Diego or North County Leadership Training Coordinator. The candidate will be notified of their rating in writing.
- 7.2.10. The Leadership Training Coordinator is the final arbiter of evaluation outing. The LTC can deny outing due to not being appropriate, approve or deny evaluator, and can overturn the recommendation of the evaluator of the outing.

## **7.3. COL REQUIREMENTS**

7.3.1. Each rating below is attained by accomplishing the following:

### **7.3.1.1. COL Trainee**

- 7.3.1.1.1. Become a member of the San Diego Chapter of the Sierra Club and be at least 18 years of age.
- 7.3.1.1.2. Participate in at least four Sierra Club outings or obtain waiver by LTC or LRSC chair.
- 7.3.1.1.3. Applicants for COL I and COL II training must fill out application that will be evaluated by committee formed by Leader Training Coordinator.
- 7.3.1.1.4. Successfully complete the "COL-I" classroom training and outing requirements.
- 7.3.1.1.5. Successfully complete "Standard First Aid" , and file proof of that completion with the COL Database Coordinator prior to approval of evaluation outing.

### **7.3.1.2. COL-I**

- 7.3.1.2.1. Plan, scout, publish and lead two Type I evaluation outings.
- 7.3.1.2.2. Complete all COL-I requirements within one year of COL-I classroom training. A Leadership Training coordinator may extend this duration up to an additional year at its discretion.

### **7.3.1.3. COL-II**

- 7.3.1.3.1. Lead at least two outings as a COL-I (other than evaluation outings).
- 7.3.1.3.2. Graduate from the Wilderness Basics Course or its equivalent.
- 7.3.1.3.3. Have a current "Standard First Aid" certification PRIOR TO THE COL-II TRAINING CLASS and complete an approved wilderness first aid course prior to approval of evaluation outing.
- 7.3.1.3.4. Successfully complete COL-II classroom training and outing requirements. COL-II trainees may take the COL-II classroom training before completing COL-I outing requirements, however 7.3.1.3.1 must be completed prior to approval of the evaluation backpack.
- 7.3.1.3.5. Plan, scout, publish and lead one Type II evaluation outing, which must be an overnight away from vehicles.
- 7.3.1.3.6. Complete all COL-II requirements within one year of COL-II classroom training.
- 7.3.1.3.7.

### **7.3.2. Currency**

- 7.3.2.1. Every twenty five months from the date a leader first met all requirements to lead an outing, regardless of level, membership must



be current, and any lapsed first aid certifications must be renewed. Further, if a leader has not led a trip at a given level in the previous twenty five months, then the leader must repeat the Evaluation Outing at that level or higher before leading an outing at the given level, or otherwise satisfy the LRSC that the leader continues to possess the requisite skills.

**7.4.**

**7.5. RECORDS**

Upon completion of all requirements of a COL rating, the individual will be notified in writing and the rating will be entered in the Outings Committee’s official list of COLs.

**7.6. MAINTAINING RATING**

7.6.1. Ratings must be kept current by meeting the following requirements:

<b>Level 1 Outings Leader Requirements:</b>	<b>Currency</b>
1. Be a current Sierra Club member	Must be current when leading an outing and at time of two year renewal.
2. Be at least 18 years old	
3. First Aid	Must be current when leading an outing and at time of two year renewal.
4. Complete COL I leader training or an LRSC approved equivalent	Must complete only once
5. Demonstrate skills appropriate to type of trip	Ongoing
6. Provisionally lead two Outings with positive feedback	Redo after having not led in the last twenty five months
7. Receive LTC approval	
8. Lead a Type I outing.	At least once every twenty five months.
<b>Additional Level 2 Outings Leader Requirements:</b>	<b>Currency</b>
1. Complete the Wilderness Basics Course or an LRSC approved equivalent	Must complete only once
2. Complete an approved wilderness first aid course.	Must complete every four years
3. Provisionally lead an overnight outing away from cars with positive feedback	Redo after having not led in the last two years
4. Receive LTC approval.	
5. Lead a Type II outing.	At least once every twenty five months.

7.6.1.1. First Aid – Maintain a current Basic First Aid certification or its equivalent. Additionally, COL-II’s must every 6 years maintain “Wilderness First Aid” certification or its equivalent.

7.6.1.1.1. Web based courses. A web-based course is acceptable for meeting first aid requirements although at least one course with an in-person component is required every 4 years.

7.6.1.1.2. Medically trained COLs. Exemptions can be obtained from the Medical Coordinator as appropriate for equivalent training.

7.6.1.2. Membership – Continued renewal of Sierra Club membership.

- 7.6.1.3. Leadership – Lead an outing at the current rating at least once every twenty-five months.
- 7.6.2. Reinstatement -- To be reinstated, a former COL who has lost their rating due to failure in maintaining the requirements noted in sections 7.6.1 – 7.6.4 must apply to the LRSC for reinstatement. Requirements to be reinstated may include one or more of the following:
  - 7.6.2.1. Plan, scout, publish and lead one or more evaluation outings at the level requested for reinstatement, and in compliance with 7.2.
  - 7.6.2.2. Meet current applicable COL rating requirements, including current membership and First Aid in accordance with 7.6.2 - 7.6.3.
  - 7.6.2.3. Approval by the LRSC.

## **7.7. ALTERNATE APPROVAL**

Any member who has had equivalent training and experience in the requirements noted above may petition the LRSC for an appropriate rating. Examples of equivalent training and experience may include serving as an outings leader for another chapter or as a national outings leader.

## **7.8. GRIEVANCE PROCEDURES**

- 7.8.1. The LRSC will review the rating of any COL when it receives a written complaint or when inappropriate leadership behavior comes to its attention.
- 7.8.2. Sierra Club Outings -- The LRSC will review the rating of any COL when a complaint has been filed for actions related to a Sierra Club outing.
- 7.8.3. COL Grievance Procedures -- Outings policy grievance procedures may be found in APPENDIX A labeled: "Outings Policy Grievance Procedures."

## **APPENDIX A**

### **OUTINGS POLICY GRIEVANCE PROCEDURES**

**September, 2011**

#### **1. Grievance Receipt**

- 1.1. The initial receipt of a grievance by a member of the LRSC shall be recorded in writing and include:
  - 1.1.1. Source, telephone number, date and time of contact, and means (telephone, email, letter, face-to-face).
  - 1.1.2. Outing, date, leader, assistant leader
  - 1.1.3. Grievance specifics and parties involved
  - 1.1.4. What complainee feels should be done

#### **2. Initial Grievance Consideration**

- 2.1. A grievance received by a member of the LRSC shall be brought before the LRSC if the grievance cannot be readily resolved or is otherwise considered worthy of committee discussion.
- 2.2. When grievances are considered, the LRSC may also choose to include an appropriate section outings representative when applicable.
- 2.3. The LRSC will conduct an investigation of the grievance in a timely manner.
- 2.4. The involved COL shall be informed of any complaint being investigated by the LRSC as soon as is reasonably possible.

#### **3.**

#### **4. Grievance Investigation**

- 4.1. If it is determined that further action is required:
  - 4.1.1. All, or a sampling of, the involved parties will be contacted.
  - 4.1.2. Contacted parties will be interviewed to determine if they have any comments about the outing and grievance specifics. The interviewer shall elicit comments concerning the role of all parties involved in the outing complaint and not focus solely on the actions and decisions of the COL. The solicited information shall also involve the following: Person contacted, how

contacted, date, time, summary of interview and pertinent interviewee comments.

4.1.3. The names of interviewees shall remain confidential and shall not be disclosed to anyone other than the committee members.

## **5. LRSC Grievance Decision**

5.1. In all cases given consideration, aggrieved party(ies) will be notified in writing that the matter is being reviewed / has been reviewed.

5.2. After applicable information has been collected, the committee will determine a course of action. Appropriate action will generally fall into one of the following categories:

5.2.1. The grievance will not be considered worthy of further action, but the COL will be notified in writing that a grievance was considered. The notification will include a brief summary of the complaint(s). The LRSC will welcome any comments from the COL and include these in a case file, along with the conclusions of the LRSC.

5.2.2. The COL will be allowed to continue offering outings, but will be asked, in writing, to meet with the LRSC for further discussion of the grievance. Failure to meet with the LRSC may result in an alteration of the COL's outings rating.

5.2.3. The COL will be asked in writing not to lead further outings until the COL meets with the LRSC to discuss the grievance and a resolution of the matter can be accomplished.

5.3. The concluding decisions of the LRSC, stating the grounds upon which the decisions were based, shall be sent in writing to the COL.

5.4. All case materials will remain in closed files. All conclusions will be kept a matter of private concern between the LRSC and the COL, subject to review by a Grievance Review Committee at the request of the involved COL.

## **6. LRSC Grievance Decision Appeal**

6.1. LRSC conclusions can be appealed within 30 days of the committee's conclusion. The appeal must be in writing, with specific reasons stated for the appeal. The written appeal should be sent to the outings chair, ExCom chair, and ExCom outings liaison.

6.2. The outings chair will convene a Grievance Review Committee (GRC) within 30 days to hear the appeal. The GRC will consist of five members of the outings committee selected from sections and entities that sponsor COL-led outings. None of these representatives shall include any LRSC individual involved in the case decision.

- 6.3. The GRC will receive documentation of the LRSC hearing and the written decision at least ten days prior to the initial GRC meeting. The GRC will hear from the COL and a representative of the LRSC. Other involved individuals may be heard if deemed necessary by the GRC chair.
- 6.4. The identities of the individuals filing the grievance with the LRSC shall remain anonymous from the subcommittee, in keeping with this grievance policy. All case materials and GRC proceedings will remain strictly confidential to the GRC and the LRSC, subject to possible review by ExCom.
- 6.5. The GRC will summarize its conclusions and make recommendations to the LRSC within 30 days of the GRC'S first meeting.
- 6.6. The LRSC and the ExCom outings liaison will meet to review the GRC recommendations within 15 days. Subsequent LRSC conclusions and any further recommended actions, shall be made known to the COL, the GRC and ExCom chair in writing.
- 6.7. Upon receiving the appeal conclusions of the LRSC, the COL may further appeal the case to ExCom within 30 days.

## **7. Additional Grievance Policy Guidelines**

- 7.1. Based upon cases considered, the LRSC will present periodic reports with the intent of general education and to prevent repetition of problems.
- 7.2. This policy, and any revisions, are subject to compliance with all policies and regulations of the Sierra Club, and by approval of the chapter's Outings Committee.

## APPENDIX B

### OUTINGS POLICY SUMMARY

The following is a summary of chapter outings policy items that should be communicated to all outings participants. The outings policy reference section number precedes the item.

#### **1.1**

Mention the Sierra Club and briefly review club objectives (anytime in the process)

#### **4.2**

Announce the total estimated cost when appropriate (in write-up)

#### **4.4.3 - 4.4.5**

Announce the refund policy when appropriate (in write-up)

#### **4.5**

Inform participants if outing is designed to raise funds (in write-up)

#### **5.2**

Announce any cancellations or modifications (as relevant)

#### **5.3.2**

Announce the leader's obligation (at outing start)

#### **5.3.2.5**

Check that 1) Sign-In Sheet/Liability Waiver is filled out completely and legibly, and 2) number of persons listed matches the number of persons planning to participate. Restate the Waiver of Liability (before outing start)

#### **5.3.2.7**

State the "lost person" policy (at outing start, if appropriate)

#### **5.3.3**

State the assistant leader's role, if any (at outing start). State roles of Front Marker and Back Marker.

#### **5.6.1**

Announce the group size (at outing start)

#### **5.6.2**

Announce the points at which the outing begins and ends (at outing start and at relevant points)

#### **5.6.5**

Detail the prohibitions (at outing start)

**5.6.6**

Note club, chapter, and outings policies concerning harassment (at outing start)

**5.7**

Clearly state the transportation policy (at initial contact and at relevant points)

**5.8.3**

State the "emergency costs" policy (at outing start)



## APPENDIX C

### OUTINGS COMMITTEE JOB DESCRIPTIONS

#### **Outings Chair - Required**

Preside at Outings Committee meetings; provide guidance to outings staff; promote and enforce club and chapter outings policy.

#### **Vice Chair - Optional**

Provide guidance to coordinators; assist outings chair and chair of Leadership Review and Safety Committee.

#### **Secretary - Required**

Record minutes of outings committee meetings; maintain records; send correspondence.

#### **Treasurer - Required**

Record all income and expenses; maintain bank accounts; prepare quarterly reports and annual budget.

#### **COL Database Coordinator - Required**

Maintain COL database; notify COLs of rating problems.

#### **COL Newsletter Editor - Optional**

Coordinate, edit, and publish the COL Newsletter.

#### **Leadership Training Coordinator - Required**

Coordinate COL training and chair Leadership Training Committee.

#### **Leadership Review and Safety Committee Chair - Required**

Coordinates LRSC activities. See 2.4.

### **Medical Coordinator – Required**

Advise on First Aid and/or Wilderness First Aid training requirements for COL's and trainees.

Provide qualified guidance in evaluating medical issues that come before the Outings Committee.

Evaluate and determine the appropriateness of First Aid and Wilderness First Aid course options as they are presented.

Recommend changes to first aid policies as course availability changes.

\*\*\* New responsibility statement \*\*\*

### **Master Calendar Coordinator - Optional**

Maintain the master outings calendar; verify compliance of outing with chapter policy before publication.

### **Member-at-Large - Optional**

COL appointed by the outings chair. Duties will be assigned by the chair.

### **Section, Group and Committee Representatives - Required**

Representatives from selected chapter sections, groups and committees with interests in outings: e.g., Wednesday in Mountains, Wilderness Basics, Bicycle, Bus, Cross-Country Skiing, FOY, ICO, Singles, North County, Pacific Crest Trail, National Outings, National Council, ExCom, Conservation.

**APPENDIX D**

**GROUP SIGN-IN SHEET / LIABILITY WAIVER**

**Located online at  
sierraleaderssd.net and**

**[https://community.sierraclub.org/file/8459/download/Sign-Up  
%2520Sheet%25202-2020.pdf](https://community.sierraclub.org/file/8459/download/Sign-Up%2520Sheet%25202-2020.pdf)**

## **APPENDIX E**

### **INCIDENT REPORT FORM AND INSTRUCTIONS**

**Located online at  
sierraleaderssd.net and**

**After contacting the proper local authorities, call the Program Safety at  
1-888-688-4647 and fill out  
<https://sierraclub.tfaforms.net/304>**

**Please also contact the Chapter director and LRSC chair.**

## [APPENDIX F](#)

### MINOR RELEASE FORM

Located online at  
(See COL Newsletter for user name and password)

Parents must sign the waiver for a minor to participate.

[https://community.sierraclub.org/section/outings/outings-wide-resources-policies/  
outings-forms/participant-agreement-liability-waiver](https://community.sierraclub.org/section/outings/outings-wide-resources-policies/outings-forms/participant-agreement-liability-waiver)