

# MAZAMA OUTINGS COMMITTEE

## HANDBOOK FOR OUTING LEADERS

Dear Mazama Outing Leader or Prospective Outing Leader,

On behalf of the Mazama Outings Committee, we wish to thank you for your interest in the outings program. A successful outing depends on the willingness of Mazama members to lead interesting, educational and diverse trips, and we appreciate your interest in being a part of this valuable program.

This handbook was reworked in 2007-8 and updated slightly in 2010. The Outing Committee hopes that the changes will make this document a more helpful guide. If you have questions, please do not hesitate to contact the Outing Committee Chairman or an Outing Committee member. You will find the names of the committee members in the current Mazama phone directory. You are also welcome to attend the monthly committee meeting. Contact the MMC for the time of the next meeting.

We welcome your questions, comments, and suggestions to improve this handbook and the outing process.

Thank You,  
Mazama Outing Committee  
Paul Gerald, Chairman  
June, 2010

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## **I. Definition of an Outing**

An outing is any club activity of five or more consecutive days' duration, consisting of a minimum of four participants, including the leaders. An event of fewer than five days will be considered an outing only if it consists of activities that do not come under the jurisdiction of another committee. The Outing Committee provides approval and oversight of all Mazama Outings.

Outings should reflect the stated purposes of Mazamas, which are "to explore the mountains, rivers, lakes and other natural scenery on land and water; to collect and disseminate scientific and other information and data concerning the same." Also, every outing must contain educational benefits for participants.

Mazamas is not a travel agency, and the leader should make it clear to participants that she/he is not a tour leader, but a fellow explorer who is willing to take on the tasks of leadership.

## **II. Requirements for Outing Leaders**

All Outings must have both a Leader and an Assistant Leader who form the leadership team.

Although the Leader may appoint his/her spouse or significant other to be the Assistant Leader, a third person must then be designated as a second Assistant Leader. The reason for this requirement is that an injury or illness to a Leader/Assistant will likely require the partner to also leave the Outing.

The Assistant Leader(s) should be involved with the planning and preparation of the Outing from the beginning. The viability of an Outing must not depend solely on the Leader. The Assistant Leader must be capable of taking over if the Leader must leave the Outing. It is recommended, but not required, that the Leader or the Assistant Leader(s) will have traveled to the area prior to the outing. The Leader and the Assistant Leader(s) must meet the following leadership qualifications:

1. They must be Mazama members.
2. They must have demonstrated ability and experience in leading groups of active adults. They must be able to provide for adequate safety, be able to direct firmly but diplomatically, and make appropriate decisions regarding group management.
3. The Leader or the Assistant Leader(s) must meet leadership requirements for the proposed outing activities or make arrangements to have a qualified leader accept responsibility for the activity in question (e.g., climbing, trail trip, Nordic skiing, etc.).

Climb Committee and Nordic Committee must approve in advance the planned climbs and Nordic ski activities.

4. The Outing Leader and Assistant Leader must be certified in American Red Cross or American Heart Association Standard First Aid and CPR at the time of the outing. A photocopy of the First Aid and CPR cards or the intent to be certified at the time of their outing must be submitted with the Outing Proposal to the Outing Committee. The Outing Committee may reimburse Leaders and Assistant Leaders for the costs of certification after the successful completion of their outing.
5. The Leader shall either participate in all of the outing's events or ensure that the participants have sufficient information and leadership to participate without the leader.
6. Leader and assistant leaders shall be familiar with the Mazama Harassment policy which prohibits harassment of any kind, including harassment based on sex, race, and national origin, religion, age, disability, sexual orientation or any other factors that do not affect the safety of the participants in club activities. The full policy can be found the member page of the Mazamas' web page or in Appendix 11 of this handbook.
7. Leader and assistant leaders shall be familiar with the Mazama insurance policy.

Insurance and Liability for Leaders: As leaders of outings authorized by the Mazamas, Outing Leaders serve as agents for the Mazamas and are responsible for the safety and welfare of the outing participants. The Mazamas carries liability insurance for leaders and assistant leaders to cover the costs relating to claims that may arise from incidents occurring on authorized outings. Details on the liability coverage can be obtained from the Mazamas business office.

Rescue Insurance: The Mazamas maintain emergency rescue and evacuation insurance for members who incur such costs anywhere in the world, subject to specific requirements and limitations. Details on the rescue insurance are available on the Mazama web pages. There is also a copy of this information in Appendix 3.

8. Leaders and assistants must be familiar with the Mazama policy on the use of substances that may impair a participant's judgment (usually referred to as the Alcohol policy). This policy differs from the basic Mazama policy as listed below because outings often involve extended periods of time in which the participants are not

engaged in what has been defined as “Mazama Activities” in the basic substance policy. Note that “alcohol” refers to any substance that may impair a participant’s judgment.

All local laws regarding alcohol use will be observed on Mazama outings. Drinking age will be the law of the location of the outing. No alcohol will be consumed during the activities. At the end of the outing day, if returning to camp and if the participants will not be driving or transporting themselves or other members, alcohol may be consumed using appropriate adult consumption decisions. Outing leaders shall not distribute any alcohol to participants during the length of the outing.

You may review the basic Mazama policy regarding substances that may impair a participant’s judgment which is printed in Appendix 10.

### **III. PLANNING AN OUTING**

#### **A. Basic Research on the Proposed Outing**

1. Decide where and what the participants will be doing, research the costs, what permits are needed and the size of the group allowed for the activities. If you have not been to the location, you do need to know how to get information needed to lead the outing. You must also consider the experience and skills participants will need. When planning an Outing, take time to think how this particular Outing fits into the definition of an Outing.
2. Find a suitable Assistant Leader and, if possible, involve this person as soon as possible in the planning of the outing.
3. Discuss your plan with the chair of the Outing committee as soon as possible in order to give the committee a heads-up. This will help the committee avoid conflicts in Outing scheduling. You do not need to have all the details nailed down for the initial discussion – mostly the potential date, location, and purpose of the outing.
  - a. Another reason for early contact with the committee is the long lead times mandated for outings. Please note that usually an outing must be approved by the committee at least six months in advance if it will take place in the United States and 12 months if it is out of the country. There are instances when the Outing Committee will approve a shorter lead time.

- b. The third reason for early contact is that the committee can provide technical assistance and support for you in developing the outing even before the outing is officially approved.
4. Familiarize yourself with Mazama policies on use of the emergency pager as well as the Critical Incident Management Plan. Both these policies may be found on the Mazamas website; as your committee liaison for further assistance.

## **B. Pre-Outing Forms**

Once you have researched your Outing and made initial contact with the Outings Committee, complete the following:

**Outing Proposal/Disclosure Form (Form A)**  
**Costing Out an Outing Form (Form B)**  
**Notice for the Bulletin**

A discussion of Forms A and B follows, as well as a discussion of the Bulletin notice. Samples of these, and all other Outing Committee forms, makes up Appendix 1. All forms may also be obtained from the Outings section of the Mazamas' website.

### **Form A: Outing Proposal/Disclosure**

This three-page form covers basic information regarding the outing. You can add additional pages to provide more information as needed. Contact an Outing Committee member for assistance if desired.

Following is an explanation of some of the items on this form:

1. The **Name** that you choose for your outing will be on all the announcements and on the information that you provide. It should not be too long but should catch attention and be descriptive.
2. **Number of Days** includes the travel days when the travel expenses are included in the cost of the outing. The travel day is also counted when there is information or other meeting on the day that participants travel to the Outing site. "Number of days" also includes the final day of the Outing when the travel is included or if there are any outing activities on that day.
3. **Leader Qualifications** includes your outdoor skills, languages spoken, knowledge of the area you plan to visit, prior leadership experiences,

certifications. Focus on the qualifications needed to lead this particular outing. If you have led many similar outings you do not need to list every outing.

4. The information on pages two and three will probably need additional pages in order to be complete.
5. **Educational Goals** must be listed. The Mazamas are neither travel agents nor outfitters. Educational opportunities are a major component of the Outing program. For example, education might be scientific, historical, or related to the skills needed to perform an activity.
6. **Possible Dangers** refers to dangers that participants might encounter. For example, if the outing is in an area infested with malaria, this should be noted. Hiking at high attitudes presents some dangers that should be listed.
7. **Trip Prerequisites** refers to the skills or experience participants need in order to join the outing. An example could be completion of advanced climbing education or an ability to hike a certain number of miles per day.

The Outing application below has some examples of the type of information needed in red. You can print off a blank form in the member page under Outing Committee Forms on the Mazama web site, [www.mazamas.org](http://www.mazamas.org).

### **Form B: Determining the Cost of the Outing**

This form is to help you compute the probable cost of an outing. You submit the completed form along with the Outing Application and Disclosure form to the Outing Committee when you apply. Most Outings will have a range of probable costs dependent upon the number of participants because these participants may be picking up some of the leader and assistant leader expenses.

#### **Definition of Terms Used on Form B**

Leader – includes the Leader, Assistant leader and the Second Assistant leader when required.

Group – all of the people on the outing including leaders

Participants – people on the outing who are not leaders

Leadership costs – the amount that is allowable if the Leaders have the participants pay toward the costs that would otherwise be incurred by the Leaders.

## **Determining Group Costs**

Items with stars \* (Lines 1, 3, 4, 5, 6, 7) are not included in computing the Outing cost **when these items will be paid for individuals Outing participants.**

Line 1, for example, asks for transportation costs. You use this line if the Leader is arranging a group airline reservation but would not list the transportation costs if each individual pays for his or her ticket themselves. The leader, of course, may want to let the participants know how much the ticket is likely to cost and what flight the leader plans to book for himself/herself.

Line 2 refers to the transportation expenses that the leader and assistant leader will incur but that are not part of the package expenses of the participants. Car travel is an example. If there is an amount on line 1, you would not use line 2 as the amount would already be included on Line 1.

Line 8 lists miscellaneous costs covered by the outing. An example would be the cost of entrance to a park or to a museum or a sightseeing trip.

Line 9 calculates the amount that will be transferred to the Mazama general fund as the outing fee. However, in the interests of simplicity in determining the range of costs of the outing, this line considers that all participants are paying the members rate for the Outing fee. Those who will be paying the higher rate will have a surcharge but this cost will not be part of the minimum and maximum cost range. The Leaders do not pay the Mazama Outing Fee unless there are two assistant leaders. In that case each assistant pays one half of the fee.

## **Leader and Assistant Leader Costs Which Can be allocated to Participants**

### **Domestic Outings**

The participants cover much of the leader/assistant leader outing costs. All leader and assistant leader costs for transportation may be covered, even when transportation is by car. Mileage in such cases is allowed at the Mazamas' current cost per mile used for trail trips and climbs. The Leader and assistant leader may also have the group cover the costs of lodging, food, guide service and permits **that are included in the outing costs** (lines 1, 3, 4, 5, 6, and 7 on Form B). However, if there are two assistant leaders, each will only be able to have the group cover one half of allowable expenses.

Leaders may pay for some or all of the costs that can be allocated to the group. In that case you will put this lesser amount on line 13.

### **Foreign Outings (including Canada)**

For the leader, the calculation of expenses that can be allocated to the group is the same as with the domestic outings. However, for the assistant leader only **one half** of these costs can be allocated. If the leader chooses to use his/her spouse or significant other as an assistant, and a second assistant leader is required, each assistant can be reimbursed for **one-fourth** (1/4) of the costs. All others in the group must pay in full.

### **Mazama Fee for Outings**

Members, spouses, children of members who are under 18 years old and members of other FWOC organizations pay \$5.00 per day. FWOC is the Federation of Western Outdoor Clubs. Trails Club of Oregon, Nordic Club of Oregon, Sierra Club of Oregon, Wilderness Watch, Friends of the Columbia Gorge, Chemeketans, Ptarmigans, Obsidians, the Cascadian's and the Mountaineers are just some of the members of the FWOC. For more information, see the FWOC website at [www.federationofwesternoutdoorclubs.org](http://www.federationofwesternoutdoorclubs.org).

Others (called non members) pay \$10.00 per day.

### **Announcement of the Outing for the Mazamas Bulletin**

This notice be published in the monthly bulletin. Articles should include:

- name and description of the outing
- dates of the outing
- names of the leader and assistant leader(s) and how to contact them
- range of anticipated cost
- amount of the deposit
- description of the educational benefits of the outing.

This announcement must be no more than 150 words and will be used the first two months that the outing is publicized. You also must provide a shorter version of 75 words for the later announcements when space is limited in the Bulletin. You may want to consult the Mazama Publication Committee style guide (see the Mazamas website) for both the bulletin and for the later article for the Annual.

Because Mazamas is a nonprofit organization rather than a commercial guiding operation, Outings may not be advertised in any commercial way, such as in a newspaper, magazine, or other publication. The only printed promotion for the outing is to be in the Mazama bulletin and on the Mazama website. **A leader may use the Trails Club and/or Mountaineers if they need more participants. Notify your liaison before using other clubs' bulletins.**

#### **IV. ACTIVITIES FROM OUTING APPROVAL TO TWO WEEKS BEFORE THE OUTING LEAVES**

1. Pick an Assistant Leader as soon as possible, if this has not already been let. Let the outing liaison know of your choice as soon as possible.
2. The Leader (or assistant) has the responsibility and authority for screening outing applicants. The Leader may deny the participation of any person who would not be compatible with the outing's expectations. It is extremely important for a successful outing that the group members are competent to do the planned activities.
3. After the Leader (or assistant) has done an initial screening, she/he will mail the following forms or encourage applicants to print these forms from the Mazama web page. Have applicants mail the completed forms back to you.
  - A. Mazama Outing Participant Application (form C) including the release of information which is on the back of the printed application.
  - B. Medical form (Form D)

A discussion of these forms is below. Samples of these, and all other Outings forms, makes up Appendix 1. All forms may also be obtained from the Outings section of the Mazamas' website.

As these forms come in, you will determine if the participant is capable of joining the outing. If accepted, you will inform the Mazama office of the participant's acceptance for the Outing and ask the participant to mail his/her deposit to the Mazama office. You will also send a list of who you have accepted to the office in order that they know what monies they should accept. The participants will make checks payable to "Mazamas".

Also inform participants who wish to pay by credit card that they will incur an additional 3% charge. They can use credit cards by calling or visiting the Mazamas office.

4. Maintain a list of alternates when the outing is full. This list may be advisable for all outings, because experience shows potential participants do change their minds after initially signing up.
5. **"Tag-Alongs" Policy:** It is Outings Committee policy that any and all individuals who are part of the outing, or who are closely associated with the outing, are to be considered participants in the outing, subject to all the procedures and policies described in this Handbook. For example, if a person

wants to share campsites or other lodgings with the outing group, but not attend or participate in outing activities, that person is still to be considered a participant in the Outing.

6. The Business Office holds the funds in separate accounts for each outing. All expenses for the outing will be paid out of this individual account. The Business Office is to send you conformation of monies received related to your outing. This is generally done by sending you a copy of the checks received for your outing, either in the traditional mail or via email. The office also maintains a separate file for each outing. They are also able to send you a copy of the Outing income and expense report and the detail report for your outing. **Liaisons should request a copy of monies of their outings, before each Mazama Outing meeting.**

For a detailed version of the check-handling process for outings, see Appendix 2.

7. Leaders will keep a list of which participants are non Mazamas and are paying the surcharge on the Outing fee. This surcharge amounts to \$5.00 extra for each day of the Outing.
8. Arrange for payments for vendors. Use the current Mazama Voucher form (Appendix 5.) All payments made to agents, vendors or reimbursements to the leadership team will come from the Business Office. In order to authorize a payment, complete a voucher form and mail or fax it to the business office attention: financial officer. Verification of the expense such as a copy of a contract or a receipt for some expense must be included. The business office only cuts checks twice a month and the office must contact the Outing Committee Chair to approve the voucher before it can be paid. Therefore it is important to submit vouchers as early as possible especially if there is a deadline for payments.
9. Arrange for refund payments to participants who have dropped out of the outing using the refund schedule below. Refunds can not be made after travel agents, outfitters; lodges, etc have been paid if doing so would put the outing in jeopardy. In every case, \$25 will be retained.

#### **Domestic outing refund schedule**

Prior to 90 days before outing: Total paid minus \$25

30 to 90 days before outing: Total paid minus \$50

Less than 30 days before outing: No refund

### **Foreign outing refund policy**

Prior to 90 days before outing: Total paid minus \$100

(or as determined by leader).

30 to 90 days before outing: Total paid minus \$200.

Less than 30 days before outing: No refund.

10. Identify leaders for trail trips, climbs, or ski trips planned during the outing.
11. Submit form to the climb committee for prior approval for climbs. Allow a couple of months lead time if possible. After obtaining approval from the climb committee, forward form to your liaison.
12. Give the participants the information needed to make airline or other travel information as soon as possible when you are not arranging transportation.
13. Advise participants on the Mazama Rescue insurance and be sure that non members realize that they are not covered. You may want to give them information on other travel insurance plans.
14. If you are arranging for a group rate with an airline, you should call the airline as soon as possible. Check back periodically as sometimes the price will decrease. Most airlines require a minimum of 10 persons in order to get a group rate and will ask for a deposit. However the airline may allow you to make some changes later. You may decide that participants are responsible for their own plane transportation in order for them to take advantage of any free mileage that they wish to use.
15. Advise participants to check with a travel clinic regarding vaccinations and travel medications approximately three months before travel date.
16. If you expect any participants who are also medical personnel to assume some responsibility in case of illness or injury during the outing you need to discuss this with these participants before the outing starts.
17. Arrange for a pre-meeting for all participants. It is best to schedule this as early as possible after knowing that the outing will go. You may want to use the MMC and can contact the business office to schedule a meeting room or area. However, a more casual meeting place in a private home may facilitate the group getting to know each other. It is nice to invite the liaison to the pre-meeting and some leaders also invite the significant others of participants. Provide participants with a list of names of other outing members in order that they may contact each other to arrange car pools, sharing equipment, etc. Bring maps, pictures, books, etc to the meeting to share. Remember that the Mazama Library may have helpful material. Most leaders provide the essential information in written as well as verbal form. Send this information to any participants who could not attend the meeting.

18. Familiarize the participants at the pre meeting with the Mazama Outing alcohol policy.
19. You may want to schedule some conditioning hikes for participants. This is a good way for the group to bond. If you are aware of a local event or program that would be of interest to participants, you may want to invite them to attend.
20. Advise the participants what sort of first aid kit is needed. Group first aid items might be carried by a number of the participants so that the leader(s) do not have to carry all of them. Be sure that you understand what items are needed for the type of activity that you are planning.
21. Provide participants a list of equipment and clothing needed for outing activities.
22. Advise participants as to anticipated weather and level of fitness needed for the activities.
23. Expect that the liaison will need to be updated at least monthly as to any problems or changes.
24. Make a photocopy of the Leader's CPR/First Aid cards and give them to the liaison.
25. Leaders should ensure they are prepared to handle Critical Incidents. For a definition of an Incident, as well as a copy of the Mazamas' Incident Report Form, see the Appendix. For domestic outings, leaders must be familiar with the Critical Incident Management Plan and their responsibilities therein. That Plan is designed for domestic outings. For international outings, leaders should know how to get in touch with the United States Embassy in the country they will be visiting. Leaders should also know how to contact local emergency and medical personnel, and/or be sure that any contracted guides and outfitters have the ability to contact such agencies.
26. Familiarize yourself with the Trail Trips First Aid Report Form, which you'll be expected to carry during the outing. It is Appendix 8 to this document.

### **Understanding the Mazama Outing Participant Application (Form C) and the Medical Form (Form D)**

The two-page participant application form includes the release of liability form. The medical form is only one page. Be sure that all of the requested information is provided. If an applicant leaves areas on either of these forms blank you should question the applicant. Applicants sometimes leave off very important health

information which could later adversely affect the entire outing group. Lack of candor by participants can also endanger the applicant in an emergency.

You must be very careful that confidential medical information is not allowed to become public information. Do not discuss this information with others without getting permission from the applicant. Do not leave the medical forms where others have easy access to them.

If you have prerequisites for the trip, be sure that the applicants have included information regarding the prerequisite on the application.

You may want to advise applicants to list the activities relating to their experience only in a certain time frame. For example, you may want to know what climbs or outings the applicant has done in the past two years.

You will keep the application form and the release of liability (Form C) until shortly before the Outing is to leave. At that time you should leave the originals with the Business office with signed liability form after making a copy for yourself.

The medical form (Form D) is to go with you on the outing. Do not leave this form in the Business Office. You may want the participants to also carry a copy of this form during the entire outing. (Otherwise, the information may not be available on the trail.

## **V. Two Weeks Before the Outing Begins**

1. Arrange the transfer of the Mazama fees from the outing account to the Mazama general account.
2. Calculate the amount that will be owed to the Mazamas (this is the amount discussed on page 10 of this handbook) and write a voucher to cover this. Send it to the financial officer at the business office and let the liaison know the amount and the date that payment was made.
3. Send the original **Participant Applications as well as the signed liability page** to the MMC to be placed in your Outing's file. This is to provide needed information in case of an emergency during the outing.
4. Send a detailed itinerary with the emergency contact numbers (telephone, fax, and email) for all locations to the MMC to be placed in your Outing's file.
5. Designate a historian to write up an account of the outing events for publication in the Mazama Annual. Check with the Liaison and/or the Mazamas website for the current requirements regarding the article.

## **VI. During the Outing**

1. Take the medical disclosure forms (form D) for the participants with you in case of illness or injury.
2. Once your outing has begun, establish the group's cohesiveness. Every effort should be made to maintain this cohesiveness throughout the trip. Nightly meetings to discuss the day's activities and plan for the next day are encouraged. Plan to eat most meals together. This preserves group identity and provides the opportunity to share impressions of each day's experience. When applicable, tent sites should be placed in the same general area to promote communication and togetherness. At the conclusion of the outing, a final meal with the group at a pre-selected location is a great way to complete the outing and to celebrate success together.
3. Be aware of and prepare to deal with such problems as fatigue, illness, inclement weather, and equipment failure. Have a plan in place for emergencies. Advise participants to tell the leader if they become ill or have had an injury. Do not hand out medications except to the person whose name is on the medication container.
4. Assign to outing members responsibilities such as setting the pace, bringing up the rear, selecting the campsite, maintaining the trip log, taking group pictures, etc., so that you do not have to do everything. The outing should be an experience in which everyone participates; outings are not guided tours.
5. Be flexible. Sometimes your planned itinerary will not work as you originally intended. When necessary, be willing to change your plans. Have alternatives in mind.
6. Maintain group harmony. On any outing, the variety of personalities may make it difficult to avoid occasional conflicts or differences of opinion. Nevertheless, it is important that you do everything you can to maintain group harmony and camaraderie.
7. If a participant is unable to perform the needed activities of the outing the leader may have to intercede. As leader you are responsible for the entire group and you have the authority to deny participation in the activity if in your judgment the participant could constitute a hazard either to him/herself or to the group. The leader may call upon the entire group or any member of the group for assistance in controlling individuals with behavioral problems. You can view the Mazama policy regarding problem participants on the Web page.
8. Carry an Incident and Accident form (Appendix 7) and a First Aid Report Form (Appendix 8) with you on the outing. You can download these from the Mazamas website. Before the outing familiarize yourself with the reporting

responsibilities in case of injury, death, some behavioral issues of participants and other incidents. See Appendices 4 and 7 for more details.

9. If there is an incident or accident during the outing, follow the Mazama procedures for reporting. Reportable incidents include death, injuries, near injuries to persons participating in the outing and any rescue attempt by an outing participant. When in doubt, report it, as even “near misses” can help Mazamas maintain accurate safety information. In the case of a fatality, or grave injury you must make every effort to contact the Mazama president or executive director immediately by telephone or email if phone is not feasible. In the case of less severe injuries or non injury incidents affecting the safety or health of an outing participant you must make every effort to submit a report within (three) days of the incident using the Incident and Accident Reporting form which is available on the web site and at the MMC. The same form can be used for cases of harassment or with certain other problem behavior from a participant.
10. The Outing Committee depends upon feedback from the Outing Evaluation (Form F) to help plan future outings and to improve the offerings. There is a copy of this form on page 23. The Liaison will contact the group members regarding this form. However, at the end of the outing it is helpful if you will mention how important it is that members respond when they are contacted. The Liaison will have the forms forwarded to you later.

## **VII. AFTER THE OUTING**

1. Prepare and submit reports to the any committees (Climbing, Trail Trips, or Nordic) which signed off on activities during the outing.
2. Check to see that the historian has written up the Annual article and sent this by email to the Publications Committee as well as the Liaison. All submitted photos must identify the individual in the picture. Group pictures are especially desirable. Generally speaking, the deadline for Annual submissions falls in October of each year.
3. Plan an outing reunion if you wish. Outing fees may be used to cover some or all of this expense.
4. In the event that the revenue for the outing exceeded the total costs, you can consider requesting that the balance be returned to the participants. However, the cost of writing checks to each participant is considerable and it is suggested that amounts of less than \$20 be donated to the Mazama general fund or used for the reunion.
5. Consider a presentation of your outing for a Wednesday Evening Program.

6. If there was an incident or accident reported to the Incident Response Team, you may be asked later for more information. The Incident Response Committee reports directly to the president and all information received or developed by the committee is to be treated as confidential and will not be divulged to persons outside the committee.
7. Destroy the personal medical information (form D) that was submitted by the participants or return the form to the participant.
8. Make sure that the Liaison has the following information
  - a. Outing proposal/disclosure form (Form A) - liaison should have this already.
  - b. Costing out form (B form) - liaison should have this already.
  - c. Final accounting of funds from Mazamas office
  - d. Post Outing Report (Form E)
  - e. Copy of annual article as submitted by historian (because this article may be more complete than what is published in the Annual.
  - f. Optional photos that show unique features of outing with captions that describe the photo and label participants.
  - g. Leader's first aid/CPR records (Liaison should have this already.)
  - h. Participants' signed releases of liability (the business office should have these and the liaison can get them from the office but you should remind liaison.
  - i. Approval from climb committee for climbs (liaison should have this already.)
  - j. Evaluation forms from participants (some of these may have been sent to the liaison already.)

Some of the above information will be sent to the Mazama archives to remain permanently, and some of it will be keep in an Outing Committee file to be saved for five years.,

# Appendix 1

## Pre-Outing Forms

### Outings Committee Forms

**Form A:** Outing Proposal/Disclosure

**Form B:** Determining Outing Cost

**Form C:** Mazama Outing Participant Application

**Form D:** Applicant Medical Information

**Form E:** Final Outing Form

**Form F:** Participant Evaluation

### Climb Committee Forms

Application for Climb Committee Exception

**MAZAMA OUTING PROPOSAL AND DISCLOSURE FORM (Form A)**  
(Please print) (Page 1)

Name of Outing: \_\_\_\_\_ **1** \_\_\_\_\_ Date submitted: \_\_\_\_\_  
Dates of Outing: \_\_\_\_\_ Number of Days: **2** \_\_\_\_\_

**LEADER INFORMATION**

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone: Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_

Email \_\_\_\_\_

First Aid Expiration date \_\_\_\_\_ CPR Expiration date \_\_\_\_\_

Leader qualifications (skills, experience, and education) related to this outing

**3**

**ASSISTANT LEADER INFORMATION**

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone: Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_

Email \_\_\_\_\_

First Aid Expiration date \_\_\_\_\_ CPR Expiration date \_\_\_\_\_

Leader qualifications (skills, experience, and education) related to this outing

**3**

**SECOND ASSISTANT LEADER INFORMATION (IF NEEDED)**

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone: Home \_\_\_\_\_ Work \_\_\_\_\_ Cell \_\_\_\_\_

Email \_\_\_\_\_

First Aid Expiration date \_\_\_\_\_ CPR Expiration date \_\_\_\_\_

Leader qualifications (skills, experience, and education) related to this outing

**3**

**MAZAMA OUTING PROPOSAL AND DISCLOSURE FORM (Form A)**  
**(Please print) (Page 2)**

General Description of Outing:

We will climb Iztaccihuatl and El Pico de Orizaba which is suitable for the advanced beginner/intermediate climber. The leader has climbed these peaks 23 times in the past and will be the climb leader. Accommodations include Hutshuts as well as a hostel. One night we will be tent camping. The Outing also includes a stay in Puebla and tickets to a performance of Carmen as performed by the local opera company. Before returning home we will spend three days diving at Isla Jon Muir.

Location (can list or attach itinerary if known):

Fly from Portland to Bangkok to Kathmandu - tour world heritage sites - bus from Kathmandu to Pokhara to Darbang - Dhaulagiri trek for 14 days - two layover days - optional climb to Dhampus/Thapa Peak - optional extension -raft the Kali Gandaki River - fly from Pokhara to Kathmandu - fly from Kathmandu to Bangkok to Portland

Educational Goals:

Gain knowledge of flora of area with emphasis on endangered plants – geology of area and observe active volcanic activity –gain understanding and participate in druid rituals

Planned Activities:

3 day rafting on Snake River – A, B and occasionally C hikes every day – climbs of North, Middle and South Sister -

Travel Agents, Outfitter or Guides if any:

Name

Contact information

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Challenges:

Upper moderate to very strenuous hiking - Stretches on exposed slopes - Hiking days may be long - Elevation gains may exceed 3,000 feet- distances may be as great as 14 miles per day - not on established trail for three days – Stream crossings every 10 minutes while hiking

**MAZAMA OUTING PROPOSAL AND DISCLOSURE FORM (Form A)**  
**(Please print) (Page 3)**

**Possible Dangers:**

**Grizzly bears common in area – Malaria in area – will be hiking at high elevation with altitude illness a possibility - Area known for water borne and food borne illness – political unrest in country recently- temperatures over 100 F and long stretches without water so heat exhaustion or heat stroke possible and so on.**

**Transportation Plans (is this included in cost?)**

**Driving mileage \_\_\_\_\_**

**Transport by Yak on day three included- Bus transport within country included- Air travel from Portland to Moscow not included**

**Equipment needed to participate:**

**Climbing helmet – climbing harness – Zero degree sleeping bag – four season tent – ball gown or tux for summit day, etc.**

**Immunizations required:**

**Hepatitis A, B, C, D and E; Yellow Fever; Typhus, Flu and update on Polio, etc.**

**Minimum number participants: \_\_\_\_\_**

**Max number participants: \_\_\_\_\_**

**Minimum age of participant: \_\_\_\_\_**

**Trip prerequisites**

**Valid passport - Completed Intermediate School or the equivalent.**

**Deposit Required: \_\_\_\_\_**

**Deadline for signing up \_\_\_\_\_**

**Range of Cost (from Form B)**

\_\_\_\_\_

**DETERMINING THE COST OF THE OUTING (FORM B)**

NAME OF OUTING \_\_\_\_\_ DATE PREPARED \_\_\_\_\_  
 LEADER \_\_\_\_\_ OUTING DATES \_\_\_\_\_

(\* ) include only if the cost is covered as part of outing

**GROUP COSTS**

- 1. \*Transportation \$ \_\_\_\_\_
- 2. Transportation cost for leader/assistant when not Included in cost of outing \$ \_\_\_\_\_
- 3. \*Lodging \$ \_\_\_\_\_
- 4. \*Meals \$ \_\_\_\_\_
- 5. \*Guides/outfitters/travel agents \$ \_\_\_\_\_
- 6. \*Camping Fees \$ \_\_\_\_\_
- 7. \*Permits \$ \_\_\_\_\_
- 8. Misc. \$ \_\_\_\_\_
- 9. Standard Mazama Outing Fees \$ \_\_\_\_\_  
 (\$5 X days of outing X number of participants excluding leader/assistant)
- 10. Total group cost (add lines 1 thru 9 together) \$ \_\_\_\_\_
- 11. Line 10 divided by minimum number in group \$ \_\_\_\_\_
- 12. Line 10 divided by maximum number in group \$ \_\_\_\_\_
- 13. Leadership costs  
 Multiply line 11 by 2 for the cost for domestic outing \$ \_\_\_\_\_  
 OR  
 Multiply line 11 by 1.5 for the cost for foreign outing \$ \_\_\_\_\_

- 1. Total Group and Leader Costs (Add line 10 and line 13) \$ \_\_\_\_\_
- 2. Participant costs for minimum number (Divide line 14 by minimum number of participants) \$ \_\_\_\_\_
- 3. Participant costs for maximum number (Divide line 14 by maximum number) \$ \_\_\_\_\_

4. Range of costs for outing is Line 15 (minimum cost) to line 16 (maximum cost)  
 Note that maximum cost does not include the surcharge of \$5.00 for each day of the outing for non Mazamas.

**Mazama Outing Participant Application (Form C)**

Outing Name: \_\_\_\_\_ Leader: \_\_\_\_\_ Date: \_\_\_\_\_

Applicant Name (as it appears on your passport): \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work: \_\_\_\_\_ Cell: \_\_\_\_\_

E-Mail: \_\_\_\_\_ DOB: \_\_\_\_\_ Occupation: \_\_\_\_\_

Passport #: \_\_\_\_\_ . Expiration Date: \_\_\_\_\_ .

Membership Status:  Member  Family Member  FWOC Member  Non Member

**Emergency Contact:**

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone number(s) \_\_\_\_\_

Experience as relates to this outing. Please list training and experience such as climb resume, other outings attended, outdoor education, other languages spoken, current fitness program. Attach an additional page if necessary.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Medical or physical condition leader should be aware of \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Have you passed a recent First Aid Class? \_\_\_\_\_ When? \_\_\_\_\_

CPR Class? \_\_\_\_\_ When? \_\_\_\_\_

Do you have any questions for the Outing Leader? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature of applicant \_\_\_\_\_

Date \_\_\_\_\_

Signature of parent or guardian if applicant is under 18 \_\_\_\_\_

Date \_\_\_\_\_

Outing applicants are required to sign the liability statement on page 2 of this application form

**OUTING APPLICATION INSTRUCTIONS and RULES**

1. Send Application, SIGNED Liability Release, and Medical Form to the Outing Leader. **A check for the deposit should be sent to the Mazama Business office after the Outing Leader informs you that your application was accepted.**
2. Outing expenses include a Mazama fee charged to each outing member. The Mazamas fee is \$5.00/day (including travel days that are part of the outing) for Mazama members, family members, and members of other non-profit outdoor clubs. The fee for non-Mazama members is \$10.00/day.
3. All Mazama outings have a non-refundable participant fee. Payments made in excess of this fee are refundable. The non-refundable fee varies based on how many months prior to the outing departure the leader is notified of a cancellation. Non-refundable fees are higher for Foreign outings than for Domestic outings. Cancellations made within 30 days of the outing departure are not eligible for refunds. Contact outing leader for specifics concerning Club policy on refunds.
4. Participants under the age of 18 must be accompanied by a parent or guardian who will be responsible for their behavior and safety during the outing.
5. No person will be permitted to climb or take part in any potentially hazardous activity if she/he has taken any drowsiness inducing drugs within 24 hours of the activity.
6. No pets, firearms or illegal drugs are permitted on Mazama outings.
7. In the event of injury or accident while on an outing, the participant must pay his/her own medical/evacuation expenses whether he/she authorizes them or not.

**RELEASE FROM LIABILITY**

Mazamas has existed as an outdoor organization since 1894. Although death and injuries have occurred during this time, the club has maintained an enviable safety record in its mountaineering, trail hiking, and other activities. In order to maintain this record, it is mandatory that participants in Mazamas outings be aware of the dangers involved.

The seasoned mountaineer knows that mountains are dangerous. Lurking under the peaceful mountain settings are perils which may not be apparent until it is too late. In seeking their freedom of the hills, mountaineers must carefully protect their own fragile existence as best as they can. Nature sometimes provides danger signs warning of impending violence, but often not. The small cloud on the horizon may bring rain, snow and high winds within a few hours. Death from hypothermia awaits the unwary and the unprepared. Beneath the surface of the glacier are deep crevasses hidden by unreliable snow bridges. A fall into one is often the climber's last. Unless the fall is checked rapidly, sprains, broken bones or death may result. Human-made climbing equipment is sometimes imperfect. A broken rope, crampon strap or ice ax shaft can result in serious injury or death.

Hazards also exist on the hiking trail, on the water, on the snow, and in cities and towns, whether in this country or abroad. Injury, illness and death may result from agents which the adventurer may neither predict nor avoid. Such agents may be natural or human-made.

The foregoing description outlines some of the risks inherent in participating in mountaineering and other outdoor activities, as well as traveling in general. You must be aware of these potential hazards before you decide to participate in a Mazamas outing.

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I am aware that mountain climbing, trail hiking, rafting, skiing, and other outdoor activities are dangerous. I accept the risk of such activities, and I undertake them on my own responsibility. Further, I understand that if I choose to pursue a private activity during this Outing which is not a recognized activity of the Outing, I am not the responsibility of the Mazamas.

In consideration of the permission to participate extended to me and the services furnished and to be furnished to me by the Mazamas, I do hereby for myself, my heirs and my personal representatives release and forever discharge the Mazamas, its council members, officers, leaders, employees and agents from any and all claims, demands, actions, or causes of action on account of my death or on account of any injuries to me which may occur from any negligent act or failure to act during my participation in or traveling to or from any Mazamas mountain climbing, trail hiking, or other activity.

**. I certify that I have fully read and understand the above and agree to be bound by its terms.**

Signature of applicant: \_\_\_\_\_

Date: \_\_\_\_\_

Signature of parent or guardian if applicant is under 18 \_\_\_\_\_

Date: \_\_\_\_\_

**MEDICAL FORM (form D)**  
**(Please Print - This form will be kept confidential)**

**Outing:** \_\_\_\_\_ **Today's Date:** \_\_\_\_\_  
**Name:** \_\_\_\_\_ **Date of birth:** \_\_\_\_\_ **Age:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Emergency Contact**

**Name:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **Cell/Pager:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Doctor's Name:** \_\_\_\_\_

**Clinic Name & Address:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Medical Insurance**

**Name:** \_\_\_\_\_ **Group/Policy#:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**The following information is necessary before participation in this Mazama Outing. It is essential to have this information in case of illness or accident.**

1. Do you have any medical problems, issues or limitations? No \_\_\_\_ Yes \_\_\_\_  
If yes, please explain:

2. Has a medical professional seen you for a medical condition in the past 12 months? No \_\_\_\_ Yes \_\_\_\_  
If yes, please explain:

3. List your current prescriptions, natural, and over the counter medication (aspirin & etc.) that you are now taking: (drug name, dosage and frequency)

4. Have you taken any medication in the past 6 months that is not listed in part 3?  
No \_\_\_\_ Yes \_\_\_\_ Please list:

5. Allergies to food, medications, or the environment? No \_\_\_\_ Yes \_\_\_\_ Please list.

6. Current immunizations? No \_\_\_\_ Yes \_\_\_\_ Please list with date:

The Outing leader will keep a copy of this during the outing in case it is needed... Please keep a copy of this completed form with you at all times during the outing.

**Signed:** \_\_\_\_\_ **Date:** \_\_\_\_\_



# MAZAMAS PARTICIPANT OUTING EVALUATION (Form F)

## To Mazama Outing Participants:

The Outing Committee and leaders of your recent outing need your feedback. In order to improve future outings please answer the following questions. A prompt response is appreciated. Please fold the form with the Mazama address on the outside, tape the ends and mail it to us. Thank you, the Outing Committee

-----  
Name of Outing: \_\_\_\_\_ Outing Dates \_\_\_\_\_  
Leader: \_\_\_\_\_ Asst. Leader(s): \_\_\_\_\_

1. Was the outing well planned and were you adequately informed of what was required of you to participate in this outing (i.e. equipment, fitness level, etc.)? \_\_\_\_\_  
\_\_\_\_\_
2. Was the leadership competent and knowledgeable? Were they receptive to feedback from the group, before and during the outing? \_\_\_\_\_  
\_\_\_\_\_
3. Would you join other outings led by these same leaders? \_\_\_\_\_  
\_\_\_\_\_
4. Were any emergencies and/or unexpected events handled effectively? \_\_\_\_\_  
\_\_\_\_\_
5. What did you enjoy most about the outing? \_\_\_\_\_  
\_\_\_\_\_
6. What could have been improved or different? \_\_\_\_\_  
\_\_\_\_\_
7. Do you feel you received good value for your money? \_\_\_\_\_  
\_\_\_\_\_
8. On a scale of 1 (poor) to 10 (excellent) would you please "grade" this outing? \_\_\_\_\_
9. How did you hear about this outing? \_\_\_\_\_
10. If you are a Mazama member, would you be interested in Leading or assisting an outing?  
Yes \_\_\_\_\_ \* Maybe \_\_\_\_\_ \* No \_\_\_\_\_

\* Please provide your name and phone # or contact the outing committee directly through the clubrooms.

**FORM USED TO REQUEST AN EXCEPTION FOR A CLIMB WHEN THERE IS NOT A CLIMB LEADER**

Requesting Committee: \_\_\_\_\_

Leader Name: \_\_\_\_\_

Date Submitted: \_\_\_\_\_

Climb Date: \_\_\_\_\_

Activity associated with climb:

Activity Date(s): \_\_\_\_\_

Peak & Location: \_\_\_\_\_

Route: \_\_\_\_\_

Expected Route Conditions/Terrain: \_\_\_\_\_

Leader Medical Training:

Leader Climbing Training: (Please include: class name, date, organization, class leader/coordinator):

Please attach Leader climb resume. For each climb, please include peak name, route, leader, summit date & organization (if applicable).

**By signing below, I attest that that no technical climbing or unsafe exposure is expected on the indicated route, and that should either be encountered, the leader will turn the party back. Technical climbing shall be defined as requiring any mountaineering equipment such as helmets, crampons, ice axe, rope, protection, etc. Unsafe exposure shall be defined as likely to cause injury, due to an unsafe combination of likelihood of a fall coupled with injurious consequences of a fall. Failure to abide by these conditions of this request, whether granted or not, will result in the petitioning committee's immediate and permanent revocation of the leader's status as an activity leader for the designated committee.**

Committee Chair: \_\_\_\_\_ Date Signed: \_\_\_\_\_

Activity Leader: \_\_\_\_\_ Date Signed: \_\_\_\_\_

# Appendix 2

## Procedure for Outing Applications and Payments

Revised October, 2009

**This procedure does not apply when the Outing fee is \$300 or less per person. Payments for those Outings may go directly to the leader, to be transferred to the office every 15 days or less.**

**For all other Outings, application payments are to be sent directly to the MMC office.**

1. The Outings Committee will give a list of outings (with the Outing Leader and Liaison noted) to the MMC office. MMC office will establish a file for each Outing.
2. Outing Applicants will send their applications (including liability release and medical form) to the Outing Leader. No checks are to be sent at this time.
3. When the Outing Leader accepts the application, they will inform the applicant (and MMC office) how much money is due and that they need to send the amount (with a note stating the name of the Outing) to the MMC office by a certain date. (If a check is received by the Outing Leader with the application, the Outing Leader will send the check to the MMC with a note explaining the circumstance.)
4. When the check comes into the MMC, it is entered onto the check log and deposited in the bank. Three copies of the check will be made: one for the check log, one for the Outing folder and one copy or scan for the Outing Leader. The check will be scanned or the copy mailed to the leader within two working days of receipt of payment.
5. Any applications (and supporting documentation such as a medical report) received in the MMC office will be mailed to the Outing leader within two working days of their arrival at the office. The amount of money received will be noted on the application.
6. Progress payments will be sent to the MMC and deposited when received (per step 5 above). Copies of these checks will also be sent to the leader within two working days of their arrival at the office.
7. A copy of the Outing income/expense report and the detail report will be sent to the leader and to the Outing Liaison upon request. In the meantime, the Outing folder in the office is available for the leader or liaison to view whenever the office is open.
8. Payments from the Outing for tours, lodging, etc. will be made as requested on an Expense Authorization and Check Request (EACR) form when approved by the Outing Committee Chair (allow two to three weeks for processing).
9. Transfer of outing fees from the outing to the Outing Committee will be made on receipt of an email or an EACR from the Outing leader. This should happen approximately two weeks before the Outing begins. The MMC will send a confirmation of the transfer to the leader and to the Outing Liaison.
10. The Mazamas accountant will issue a QuickBooks' statement (income, expense) on closure of the Outing to the Leader and Liaison

# Appendix 3

## DESCRIPTION OF THE MAZAMA RESCUE INSURANCE AVAILABLE TO MEMBERS ON OUTINGS

### Basic Rescue Coverage

Mazamas will pay any and all emergency rescue and evacuation costs and expenses for which a Mazama member in good standing may be legally responsible for emergency rescue and evacuation of such Mazama members anywhere in the world, subject to the following:

- The maximum payment per Mazamas member is \$3,000.00 in any annual policy period (Oct 1 - Sept 30, the Mazamas FY. Emergency expenses for transportation, medical services and supplies necessarily incurred during the rescue and evacuation resulting from hiking, climbing, or backcountry skiing activities are covered. In addition, up to \$2,000.00 will be reimbursed for the costs of retrieving and transporting to the nearest international airport the body of a covered Mazama member who died while engaging in the above covered activities.
- There is a \$250.00 deductible per Mazamas member per accident. This deductible shall not apply to evacuation of a body or bodies.
- Emergency rescues and evacuations relating to trips to climb peaks over 6,000 meters are NOT covered, except as set forth in Section II below.
- Such rescues or evacuations must be necessary for medical or safety reasons. At Mazamas discretion the emergency rescue and evaluation must either (a) be certified by a legally licensed physician to have been necessary for emergency injury or illness or (b) be certified by a mountaineering ranger or the mountain rescue office in charge to have been necessary under the circumstances to prevent likely injury. Rescues or evacuation for convenience only or otherwise not meeting the above criteria are not covered.
- Coverage begins and ends at the trail head. Rescues or evacuations relating to accidents while traveling to or returning from the trail head are specifically excluded. Cost relating to searches for missing persons are specifically excluded.
- Coverage is excess to any other valid collectible insurance which the insured person may have to cover any qualified rescue or evacuation. A claim for payment must first be made by the insured person to any health, travel or other insurance which the insured may have in effect that will pay all or part of the rescue, medical or emergency evacuation expenses.

- There is a per-accident limit of \$10,000.00. If more than one Mazama member is involved in an emergency rescue or evacuation resulting from the same occurrence, the total amount payable will be no more than \$10,000.00. This amount will be pro rated to the persons insured in a proportion equal to their covered expenses. If a rescue or evacuation involves one or more Mazama members and one or more non-Mazama members, common rescue expenses will be paid on a pro rate basis for the Mazama member only, up to the per member limit of \$3,000.00 and per accident limit of \$10,000.00.
- No more than \$30,000.00 in covered emergency rescue, evacuation and accidental medical expenses will be paid in any fiscal year for all Mazama members insured.
- The costs of military evacuation flights operated by the US Military, Air National Guard or US Coast Guard within the United States are not covered costs or expenses, unless the insured is billed for such costs by such entities.
- Claims must be made within 60 days of the emergency rescue or evacuation. Claims must be submitted in writing, together with appropriate supporting documentation, to Risk Management Committee.

# Appendix 4

## Mazamas Committee Expense Authorization & Check Request

*(Attach receipts or invoice)*

<p>Pay to: _____</p> <p>Address _____</p> <p>C/S/Z _____</p> <p>Amount: \$ _____</p> <p>Committee _____</p> <p><i>Specific Outing, Course or Class</i></p> <p>_____</p> <p>Account # _____</p> <p>Acct name _____</p> <p>Description _____</p> <p>_____</p> <p>Comments _____</p> <p>_____</p> <p>_____</p> <p>Are you a Mazama Climb Leader?</p> <p>YES NO <input type="checkbox"/> <input type="checkbox"/></p> <p>Requested by: _____ Date _____</p> <p><b><i>ORIGINAL receipts AND approval are required for <u>all</u> reimbursements and/or check requests.</i></b></p> <p>Approved by: _____ Date _____</p>
<p style="text-align: center;"><i>Office use only</i></p> <p>Date paid: _____ Check# _____</p>

# Appendix 5

## MAZAMA POLICY REGARDING PROBLEM PARTICIPANTS

### Leader responsibilities for problem activity participants

1. The leader of any Mazama activity has the responsibility for the entire group. He/She has the authority and is encouraged to screen all activity participants. If the leader judges that a person is not properly equipped or is not qualified to participate, that person may be denied participation in the activity. Qualifications to be considered include physical, mental, and emotional condition. The leader must carefully evaluate the one who, in the judgment of the leader, could constitute a hazard either to him/herself or to the group. If problems are anticipated, the person should be denied participation.
2. If a problem develops with a participant during an activity, the leader may call on the entire group or on any member of the group for assistance in controlling the problem(s). Some suggestions for controlling individuals with emotional behavior problems include:
  1. Verbal reassurance and direction.
  2. Interceding action to de-emphasize unstable behavior (to prevent transmitting the instability to the group.)
  3. Gentle firm restraint if necessary.
  4. Evacuation if necessary.
3. When a problem does develop and a leader discovers that a person is uncooperative and/or unable to participate physically, mentally, or emotionally, the leader has the responsibility to report this to the Climbing Committee. The reported individual has the right to appear before the Climbing Committee to explain his/her behavior. After consideration and evaluation by the Committee, if it is determined that the person should be denied further participation on climbs or Mazamas activities, such information should be reported to the Mazama Executive Council for future action and dissemination, if necessary.

\* If the incident(s) do not involve climbing, leader should contact the Outing Committee Liaison regarding follow up rather than the Climb Committee

# Appendix 6

## DISCUSSION OF WHEN INCIDENTS SHOULD BE REPORTED TO THE RISK MANAGEMENT COMMITTEE

Incidents should be reported when they have impacted the activity for one or more persons in more than a cursory, or typically planned-for way. The reportable incident should involve one or more of the following:

**Injury or Illness:** it requires more than simple first aid and more than cursory leader or group attention. It requires follow-up care by leader of group in the field, and significantly interferes with people's participation in the activity or with meeting group goals. Activities that involve evacuation must always be reported.

**Behavioral:** Human actions or lack of action that may be verbal, physical, or psychological. Examples include unwillingness to participate, getting lost, disregarding leader directions, recklessly endangering others, alcohol abuse, or behaviors that significantly interferes with members' participation in the activity.

**Near-Miss:** This could be called a "close call" that would have, or did, significantly affect one or more people. It is a potentially dangerous situation where safety was compromised but that did not result in reportable injury. Any participant can fill out an incident report, but they are required from Leaders and Assistant Leaders. When in doubt about whether or not to report an incident, contact the RMC.

# Appendix 7

## INCIDENT REPORT FORM- DIRECTIONS

### **What is an Incident?**

An incident is any event that impacted the activity, or any participant in the activity, in more than a minimal or planned-for way. Examples of incidents that must be reported include:

- ◆ Any illness or injury that requires treatment beyond basic first aid, either in the field or afterward (e.g. sprains or broken bones, but not blisters or colds).
- ◆ Any activation of search and rescue or the evacuation of a participant
- ◆ Actions that significantly disrupt the activity or a person's participation in the activity (such as alcohol abuse, disregarding leader instructions, harassing or threatening behavior, lost party member, etc.)
- ◆ A close call or "near miss" that could have resulted in injury or other adverse consequences (such as rock fall, avalanche, falls, etc.)

### **Who is responsible for filing an Incident Report?**

Mazama activity leaders are expected to file an incident report, using the Mazamas Incident Report Form, if an incident occurs during a Mazama activity. In addition to the leader, other participants may submit an incident report, but are not required to do so.

### **How Do I File An Incident Report?**

Fill out the 2nd and 3rd pages of this form and submit to the MMC office either electronically or as a hardcopy.

### **What Happens Then?**

The Risk Management Committee reviews incident reports at their monthly meeting, and all people filing an incident form will receive a response from the RMC summarizing the findings. Incident reports are confidential and are only seen by the RM Committee members and MMC paid staff. If requested by the originator, RM will share an incident report with the CIDT. Once an incident is closed, the information is entered into a secure database and reviewed periodically for trends or reoccurring problems that Mazama activity committees can learn from.

# MAZAMAS INCIDENT REPORT FORM

Report # \_\_\_\_\_

## Page 1 of 2

### 1 - SOURCE OF REPORT:

Date of Report: \_\_\_\_\_

Your Name: \_\_\_\_\_ Phone: day \_\_\_\_\_ evening \_\_\_\_\_

Your role:  leader,  assist,  party member,  rescuer,  other

---

### Information about the Incident:

2 - DATE OF INCIDENT: \_\_\_\_\_ Time of Day: \_\_\_\_\_ am/pm

### 3 - LOCATION OF INCIDENT: Where did the Incident Occur?

Mountain/Location: \_\_\_\_\_ Route: \_\_\_\_\_

Leader: \_\_\_\_\_ Party size: \_\_\_\_\_ Weather: \_\_\_\_\_

### 4 - ACTIVITY (check one)

Climbing (  Snow,  Ice,  Rock,  Belaying,  Rappelling)

Hiking  Canoeing  Camping/Cooking  Other: \_\_\_\_\_

Backpacking  Kayaking  Swimming

Skiing  Rafting  Vehicle travel

### 5 - MAZAMAS PROGRAM (check one)

Mazamas Climb (  A,  B,  C,  D,  E)  Outing: \_\_\_\_\_

Climbing School (  Basic,  Int,  Adv Rock,  Adv Ice)

Nordic Skiing (  Beg,  Int,  Adv,  Telemark)  Ski Mountaineering

Trail Trip:  A,  B,  C  Other: \_\_\_\_\_

AYM  non-Mazama party assistance

Other

### 6 - OTHER INFORMATION:

Was outside help required? (check if yes)

Was a debrief held with participants? (check if yes)

Was the party made aware that Critical Incident Debriefing is available?

Was portable communication equipment used? (If so, describe: \_\_\_\_\_)

7 - INCIDENT DESCRIPTION: Describe the incident; attach additional pages, if needed.

8 - WHAT CAN WE LEARN? List the key points we can learn from this incident.

-----  
**MAZAMAS INCIDENT REPORT FORM (page 2)**

**Information about the Injured Persons (one page per injured person):**  
-----

9 - WHO WAS INJURED / INVOLVED? (Use additional sheets for additional injured)

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Sex: M / F Experience: None / Moderate / Exp.

10 - TYPE OF INJURY: What happened to the person?

Injury  Lost  Behavioral (disruptive)  Near miss  
 Illness  Death  Property damage  Other \_\_\_\_\_

11 - IMMEDIATE / PRIMARY CAUSE OF THE INJURY?

Circle the one item you checked below that you feel was the most significant cause  
-----

**Information about Injuries:**

12 - CONTRIBUTORY CAUSES: check the items in each section that you feel contributed to this incident

**UNSAFE CONDITIONS**

Weather  Fall or slip on rock  Equipment failure  Hazardous animal/plant  
 Avalanche  Slip on snow or ice  Inadequate equip/clothing  Illness  
 Lightning  Fall Into crevasse/moat  No hard hat  Unfit  
 Darkness  Falling rock, ice, object  Nut/chock pulled out  Psychological  
 Exposure  Swift/cold water  Piton pulled out  Other:  
\_\_\_\_\_

**UNSAFE ACTS**

Ascending too fast  Loss of control/glissade  Improper procedure  Skiing  
 Descending too fast  Faulty use of crampons  Ineffective instruction  Dehydration  
 Moving too slow  Inadequate belay  Poor supervision  
 Drugs/alcohol  
 Climbing unroped  Rappel failure/error  Poor position  Other: \_\_\_\_\_  
 Climbing alone  Placed no/poor pro

**ERRORS IN JUDGMENT**

Distraction  Failure to follow directions  Exceeded abilities  Party separated  
 Miscommunication  Failure to follow route  Fatigue  Stranded  
 Misperception  Failure to test holds  Schedule  Other:  
\_\_\_\_\_

13 - EVACUATION / OUTCOME (check all that apply)

Subject left Activity (  walk unassisted,  litter,  vehicle,  helicopter,  other \_\_\_\_\_ )  
 Subject entered medical facility  
 Returned to activity after treatment in the field

14 - INJURY INFORMATION (fill out one line for each injury experienced by the injured person)

TYPE OF INJURY or ILLNESS <sup>1</sup>	POSITION OF INJURY <sup>2</sup>	INJURED BODY PART <sup>3</sup>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

# Appendix 8

## MAZAMA TRAIL TRIPS FIRST AID REPORT FORM

Use this form to document an accident or illness on a Trails Trip Outing (presumes Basic First Aid training).

### Scene Survey (safety, initial impression, gloves, permission)

# of Patients:	Introduce self, obtain permission to assist: Y      N	Location:	Time:	Description of scene:
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### Check A,B,C's – Stop and Fix

Airway:	Breathing:	Circulation (bleeding):	Suspect spinal or head injury? Y      N <i>If Y, do not move patient, keep head and back from moving.</i>	Protect patient from environmental conditions (cold, heat, hazards).
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### Patient Information:

Name:	Age:	Phone:	Address:	Emergency Contact:
	Sex: M/F			

### Document Injuries/Illness

*Ask what happened, where it hurts*

**Injury:** Ask or check for wounds on HEAD, NECK, CHEST, ABDOMEN, PELVIS, ARMS/HANDS, LEGS/FEET, BACK.

**Illness:** Ask patient to describe the symptoms they are feeling, for how long.

Describe:

### Describe First Aid Given:

### Medical History

Allergies:
Medications:
Past Medical History:
Last Food/Water:

### Evacuation Plan

Self Evacuation?	Describe Plan:
Call Emergency 911?	Describe Plan:

Rescuer Name(s):	Phone:	Email:	Notes:

# Appendix 9

## Mazamas Fatality Policy

### **Scope:**

This policy covers any fatality during Mazama sponsored functions or on Mazama controlled property.

### **Notification of Authorities**

The activity leader or their alternate must contact 911 or other emergency personnel depending upon location (e.g. National Park Service or Forest Service) as soon as possible when a fatality occurs.

The activity leader or their alternate must also contact the Mazama emergency pager number, 503-227-2345 ext. 3, as soon as possible after first notifying 911.

### **Information to Be Transmitted**

All information pertinent to the fatality contained on the Mazama First Aid SOAP Note Form will be given with the 911 call. Any photographs that have been taken of the scene will be surrendered to authorities upon first opportunity. The leader will collect memory cards or undeveloped rolls of film and give them to authorities. NOTE: Every leader of Mazama sponsored activities is required to carry the Mazama First Aid SOAP Note form.

### **Evacuation of Body**

The activity leader, or in his/her incapacitation the assistant leader, will discuss with the authorities what to do with the body. Under no circumstances is the party to move or evacuate the body without first speaking with the authorities. Even if permission is given to move the body, do not do so if it puts the party at further risk. If permission is not given to move the body or your party is not safely able to do so, the authorities will provide the necessary personnel and equipment to conduct the evacuation. If a body is left, it should be secured against damage and the location and route carefully marked so others may locate it without the party's assistance. If the party is equipped to remain overnight and chooses to do so, the leader should send a minimum of two people out with complete information as contained on the Mazama accident form (if safe to do so). Because many Mazama activities are one-day events and overnight equipment may not always be carried, the group should not stay overnight with the body at the accident site if it does not have the necessary equipment and food to do so.

### **Notification of Mazama President/Director**

The Chair of the Risk Management Committee will activate the Critical Incident Plan and notify the President, Executive Director, and Executive Council that a fatality has occurred after hearing from the party via the emergency pager system.

**Notification of Next of Kin by the Authorities:**

The local authorities that are staffed and trained in these matters will notify the next of kin. Under no circumstances should a member of the party where a fatality has occurred contact the next of kin until the authorities have had an opportunity to do so. If possible, a member of the Mazamas should accompany and/or be with the authorities when the notification is made.

**Statements to Authorities, Family Members, and Press**

Except for the initial report to authorities at the scene, all information regarding the accident shall be transmitted through the Mazamas public information officer. For the sake of accurate and controlled information, the public information officer will be the liaison to both the responsible authorities and the members of the party. Under no circumstances will any party member, including the leader, have any contact with the media. The public information officer will be the only one authorized to speak for the Mazamas.

**Condolences**

Some form of expression of condolence (letter, flowers, etc.) should be sent to the family of the deceased by the Executive Director at the request of the Mazama President. This should be followed by personal contact by a representative of the Mazamas. This person should be the President or President's designee, and this should be done within five days of the incident.

Revised by Risk Management Committee  
and approved by Executive Council 5/12/09

# Appendix 10

## Mazamas Policy on the Use of Substances that May Impair a Participant's Judgment

**Policy statement:** The purpose of this policy is to reasonably manage the risks to participants and non-participants from the use of substances that may impair the judgment of a participant in Mazama activities.

***Use of any substance, or being under the influence of any substance that may impair a participant's judgment, is not allowed during any Mazama activity***

**Mazama Activity:** A Mazama Activity is defined as an outdoor-oriented group function organized under the auspices of the Mazamas. Mazama Activities include educational schools, but do not include meetings or functions that are primarily social in nature.

A Mazamas Activity begins with the departure from the trailhead or Activity parking lot and ends with the conclusion of the return trip to the pre-determined trailhead or Activity parking lot. The responsibility of the Activity leader and all assistants ("Leaders") persists for the duration of the Activity and ceases with the end of the Activity. Leaders shall not distribute any substance that may impair a person's judgment. This prohibition does not create or expand any other responsibility of the Leader, either personally or as a representative of the Mazamas. The Mazamas assumes no responsibility for participant behavior occurring before or after the Activity.

For the purposes of this policy only, when the Mazamas provide transportation to or from an Activity, that transportation is considered part of the Activity, from the first time the participants board the transportation to the last time they disembark. Carpooling to and from an Activity is not deemed "transportation provided by Mazamas" and hence is not considered part of a Mazama Activity.

Meals, celebrations or any other activity after the conclusion of a Mazama Activity are not part of Mazama Activities.

It is important that trip participants and Leaders understand that the Mazamas have no further responsibilities or duties toward the group once the Activity is completed. This policy should be clearly stated in communications about specific Activities to those Activity participants.

The Mazama Lodge and the Outings Committee operate under separate policies as approved by Executive Council.

*Final – April 11, 2007, Amended 1-8-08*

# Appendix 11

## Mazamas Harassment Policy

*Approved by Executive Council January, 2003*

Mazamas does not condone or tolerate harassment in connection with any of its programs or activities. The Mazamas is committed to maintaining an environment of respect for its members and others who participate in its activities, free of harassment of any kind including harassment based on sex, race, national origin, religion, age, disability, sexual orientation, or other factors, which do not affect the safety of the participants in Mazamas activities.

This policy applies to actions by any member or participant toward another, including in the capacity of a leader, instructor, volunteer, employee or officer. Anyone who believes he or she has experienced harassment should report the conduct to the activity leader, an activity committee chairperson, a member of the Executive Council, or the Executive Director. Persons who violate this policy may be denied the opportunity to participate in Mazamas activities and/or may have their membership status restricted or terminated.

### **Definitions and Procedure for Complaints**

Harassment generally refers to serious, persistent conduct that is offensive, demeaning or threatening to another person and that could interfere with that person's ability to participate in Mazamas activities by creating a hostile, offensive or intimidating environment. Sexual harassment is generally defined as unwelcome sexual advances, requests for sexual favors, or other visual, verbal, or physical conduct of a sexual nature, when submission to such conduct is made a condition of participating in a Mazamas activity, or when such conduct interferes with a person's ability to participate or creates a hostile or offensive environment. Harassment based on race, color, religion, national origin, age or disability can include, but is not limited to, verbal conduct, including making hostile or derogatory comments, epithets, slurs or jokes about such individuals or groups, or creating or posting visual displays such as cartoons, objects, pictures or posters that depict such groups in a derogatory way. Harassment may occur between individuals of the same or opposite gender, and persons of the same or different race, religion, etc. Each person is responsible for supporting and adhering to this policy. Participants should not tolerate inappropriate behaviors. Anyone who witnesses or is subject to inappropriate behavior should make his or her feelings known to the offending person and state that the behavior should stop immediately. This may resolve the problem. If the behavior does not stop, or the person is not comfortable confronting the behavior, then he or she should report the behavior to the activity committee chairperson, a member of the Executive Council or to the Executive Director. The Executive Director will investigate all complaints of harassment promptly unless the Executive Director is involved in the harassment, in which case the President or their designee will investigate. The Executive

Director will determine the scope and manner of investigation so as to gather the relevant information in a fair and timely manner. To the extent possible, confidentiality will be maintained except as necessary to conduct the investigation and take appropriate remedial action. The Executive Director will make full reporting to the Executive Council. A member who, after appropriate investigation, is found to have engaged in harassment may be subject to remedial action by the Executive Council which is intended to remedy or prevent further harassment. Such action may include excluding the individual from particular Mazama activities, limitation of membership, or expulsion in accordance with the Mazamas bylaws.

Anyone who in good faith brings forward a complaint of harassment or participates in an investigation will not be retaliated against for bringing the complaint or participating in the investigation. Anyone who believes they are being retaliated against should report such action promptly to the Executive Director or Mazamas President.