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## PCA MINIMUM OFF-ROAD DRIVING TOUR STANDARDS

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Effective January 2023

The purpose of the PCA Off-Road Minimum Driving Tour Standards is to provide each Region with the foundation on which to build their own Off-Road Driving Tour Program that is safe and minimizes environmental impact. These Standards were designed to be minimal in nature so any Region can have more stringent rules; no Region shall have any that are more lenient. Any Region conducting an off-road driving tour must meet all the Minimum Off-Road Driving Tour Standards. Additional Standards for On-Road Driving Tours are available on PCA.org for tours that have both on and off-road components. Definitions are included below and are part of these Standards. Additional PCA Driving Tour Committee Recommendations for off-road driving tours are included at the end of these Off-Road Minimum Driving Tour Standards as Attachment 1. They are intended to further enhance the driving tour experience for all tour leaders and participants.

### DEFINITIONS

- Off-Road Driving Tour:** An off-road driving tour is an organized event in which participants gather at a start point defined on the PCA event insurance certificate, then drive in a follow-the-leader format, in an assigned group or groups that remain together and include both a lead and a sweeper vehicle(s), along the established tour route which includes driving off-road, to the end point identified on the insurance certificate.
- PCA Liability Insurance Coverage for Off-Road Driving Tours:** All participants, including passengers shall sign liability waivers. PCA coverage is only in effect for the route defined by the start point and end point on the insurance certificate and driven by the participants who have signed waivers for that off-road driving tour. Participants who intentionally separate themselves from the group are considered to have left the driving tour and may no longer be covered under PCA insurance.

*Note 1:* If your Region conducts off-road driving tour events that meet the above definition and does not obtain a Certificate of Insurance and collect signed waivers, then your event, Region, Region's officers, you and PCA may not be covered by PCA insurance and all may be exposed to potential liability in the event of an incident.

*Note 2:* If your Region conducts off-road driving tour events that do not meet the above definition, even if you obtain a Certificate of Insurance and collect signed waivers, then your event may not be covered by PCA's insurance.

- Off-Road:** For the purposes of these Standards, off-road means the portion of any driving tour that takes place on unpaved surfaces that may not be defined by a named road. Unpaved named or numbered Forest Service or other federal/state/provincially managed roads are also considered off-road.
- PCA Off-Road Rating Categories: CAT 1, 2 AND 3 ARE ACCEPTABLE**

CAT 1 Graded and maintained, dirt/packed, dry gravel, rock, ice, snow or sandy road. Suitable for all factory standard height 4WD/AWD Sport Utility Vehicles (SUVs), trucks or off-road rally cars (not stock sports cars/sedans). Gentle grades <10 degrees or a grade of <17%. No ruts/rocks or mud under normal conditions. Road is at least two vehicles wide.

CAT 2 Dirt, gravel, rock, ice, snow or sandy road with infrequent or light maintenance, with ruts or exposed rocks up to 5". 4WD/AWD SUVs, pickup trucks or off-road rally cars required (not stock sports cars/sedans). Grades up to 10 degrees or 17%. Two vehicle passing still possible along entire route.

CAT 3 Trails characterized by two vehicle tracks instead of a graded/lightly maintained road. Natural rutted washes or gulches with water up to 6" across track (manmade crossings are exempt). 4WD/AWD SUVs, short 1/2-ton or lighter trucks or off-road rally cars required (not stock sports cars/sedans). Moderate grades between 10 degrees/17% and 15 degrees/27%. Vehicle passing only possible in select places. Some slickrock surfaces when wet. Exposed rocks up to 7". Standard profile wheels may be damaged unless high profile or lugged tires are used.

- **Other Off-Road Rating Categories: CATEGORIES 4 AND 5 ARE NOT ACCEPTABLE DUE TO THE HIGHER RISK OF VEHICLE DAMAGE, PERSONAL INJURY OR ENVIRONMENTAL IMPACT**

CAT 4 Rugged track consisting of loose rock, dirt, mud and sand with some slickrock surfaces. Rocks up to 9". Water crossings up to 12" possible. Loose surfaces with tight clearances possible. Side hill terrain up to 15 degrees and moderate grades up to 15 degrees or 27%.

CAT 5 Rugged trail designed for high clearance SUVs with underside protection such as skid plates and low range gearing. 6" holes. Rocks larger than 9". Water crossings of 12" or more. Parts of track may be entirely in a wash with loose sand and large rocks. Side hill terrain up to 20 degrees or 36%. Moderate grades of 15 degrees or 27% or more.

- **Tour Route:** Each off-road driving tour follows a specified route as planned by the tour leader and documented in written (or electronic) driving directions.
- **Tour Leader:** This person is responsible for the overall planning and safe execution of the off-road driving tour, including communicating the type of conditions expected for the route, pre-running the route, and making decisions about whether it is safe to keep going, to change to an alternate/easier route or to turn back. The tour leader shall be sufficiently experienced in off-roading on the type of planned road surfaces and will be relied upon to keep the group safe, including in inclement conditions. The role of the tour leader includes planning the tour route and coordinating the tour start point, end point, rest stops and regroup points. Additionally, the tour leader is responsible for ensuring an adequate participant safety briefing is conducted in accordance with these Minimum Off-Road Driving Tour Standards.
- **Tour Group:** A number of cars, assigned by the Tour Leader, that will drive together behind the tour/group leader and in front of the sweep/trailing car(s) with the goal of remaining as one organized group from the tour starting point until the advertised destination.

- **Group Size:** The number of cars in each individual group. The purpose of limiting group sizes is to avoid impeding other traffic and annoying members of the public, safely control the group(s), reduce the risk of becoming separated and enable effective communications. Group sizes shall be managed based on the area to be travelled (sparsely populated country/rural routes vs. urban/populated routes with numerous stoplights/signs), visibility between cars within the group and the driving experience of the group.
- **Group Leader:** For driving tours with multiple groups, the group leader(s) are responsible for leading their respective groups in compliance with all instructions outlined by the tour leader and these Minimum Off-Road Driving Tour Standards. Group leader(s) are responsible for assisting their group through more challenging terrain as may be required.
- **Sweeper:** Also called the trailing or following vehicle, the sweeper is at the tail end of the tour or group. The sweeper's duties include assisting any participants who may encounter car or health difficulties, advising the tour/group leader if vehicles became separated from the group and advising the tour/group leader about any unsafe driving practices by a tour participant so the tour/group leader(s) can take appropriate action to curtail such unsafe driving practices.
- **Insurance Certificate:** The official liability insurance certificate issued by PCA showing the insurance coverage, date of the event, the off-road rating category and the start and end points for the event. Category 4 and 5 off-road tours are not acceptable to PCA.
- **Waiver Forms:** In the event of an incident, the PCA waiver provides an initial level of protection for PCA and all PCA persons from liability in connection with the incident. "Release and Waiver of Liability" forms for both adults and minors are published on the PCA.org website and in the Region Procedures Manual (RPM). Alternatively, PCA has approved the use of electronic waiver forms developed by MotorsportReg.com and Club Registration in lieu of the paper forms, except for Minor Waivers which must be in paper form.

## **PCA MINIMUM OFF-ROAD DRIVING TOUR STANDARDS**

- **Waivers and Insurance**
  - A PCA liability insurance certificate shall be requested from PCA National on the insurance request form published on PCA.org and in the RPM. A hard copy shall be available when participants check in and carried by the tour leader on the tour.
  - PCA National shall be notified within 24 hours if an off-road driving tour is cancelled.
  - PCA National shall be notified prior to the tour date if the start or end location is changed.
  - There shall be an established method to ensure ALL participants, including passengers, sign the waiver(s) and receive the safety briefing prior to the start. If other participants join at an intermediate point or start from an alternate location, they shall also sign the waiver form(s) and receive a safety briefing prior to participation. If electronic waiver

- forms are used, there shall still be a method established to ensure all participants have electronically signed the waiver. This includes procedures for minors on the tour.
- At least one parent/guardian shall be present to sign the "Minors as Observers Only Form" for each participant under the age of 18, if applicable. Alternatively, a notarized waiver may be presented at the event.
  - Off-road driving tours shall use the waiver forms printed in color (with red type).
  - All drivers shall be at least 18 years old.
- **Tour Planning**
    - Off-road driving tours shall be limited to SUVs, trucks and off-road rally cars with AWD/4WD (not stock sports cars/sedans).
    - An off-road driving tour self-inspection safety checklist shall be circulated to all drivers at least 2 weeks prior to the event.
    - Prior to the event, pre-run the route in order to confirm the suitability of the route and the accuracy and completeness of the route directions.
    - In order to avoid impeding other traffic, safely control the group(s) and reduce the risk of becoming separated, group sizes shall be managed based on the area to be travelled, visibility of cars on the tour and the off-road driving tour experience of the group.
    - Group sizes shall be dependent upon the type and condition of the road/trail with the objective of drivers maintaining visual contact with the vehicle ahead and behind during the driving tour.
  - **Tour Conduct**
    - If an off-road driving tour includes any segments using public roads, the PCA Minimum Driving Tour Standards shall apply to such segments.
    - Each off-road driving tour shall have an assigned leader and sweeper per group, each of whom shall have a two-way radio.
    - The cell phone numbers and radio channels of two-way radios of all tour/group leaders and sweepers shall be provided to all participants.
    - In order to reduce the risks associated with distracted driving, each tour/group leader and sweeper car shall have a minimum of 2 occupants primarily for the purpose of safely navigating the route and conducting safe/legal communications. A solo driver in the sweep car is allowed ONLY if they have pre-run the entire route, or have voice turn-by-turn electronic route directions/commands.
    - Route directions shall be provided for all vehicles.
    - For the off-road portions of the driving tour, participants shall obey all off-road safety signs and cautions.
    - Each tour/group leader and sweeper vehicle shall have a safe method of communicating within the group in compliance with local laws.
    - The tour/group leader shall conduct a formal participant/safety briefing for all off-road driving tour participants prior to departure, including all items specified in the safety briefing section below.
    - If it becomes necessary to use a tow strap/cable, put a tarp or blanket over the strap/cable to minimize the whip-effect if the hook/strap/cable releases unintentionally. Advise all participants to keep a safe distance.
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- PCA subscribes to the principles of the environmental leadership demonstrated by the T.R.E.A.D. Lightly organization. Their principles must be followed to the maximum extent possible: [www.treadlightly.org/recreation\\_tips/4x4ing/](http://www.treadlightly.org/recreation_tips/4x4ing/). In spirit and practice, the objectives of PCA’s off-road driving tours are to enjoy back-country roads while having minimal impact on the surroundings.

▪ **Post-Event Reporting**

- All post event reporting shall be completed using the online forms on PCA.org.
- The tour leader shall complete and submit the Post Event Report to PCA within 5 days of the event.
- The tour leader shall assign someone who is not involved in planning or organizing the event to complete and submit the Observers Report for Off-Road Driving Tours to PCA within 10 days of the event.
- The tour leader shall complete and submit an Incident Report to PCA, if needed, within 5 business days of the event (the next business day if bodily injury is involved).
- Incident reporting: In addition to completing an incident report, the tour leader shall notify the region’s safety Chair if an incident occurs.

A Region's repeated failure to comply with these Minimum Standards after warnings of non-compliance or refusal to adhere to these Standards could prevent the Region from obtaining PCA insurance for future off-road driving tour events.

**MINIMUM SAFETY BRIEFING FOR OFF-ROAD DRIVING TOURS**

The following points shall be communicated during the safety briefing for all participants, including passengers prior to tour departure. Most points can be read as a script. Additional points to consider are included in “PCA’s Additional Recommendations for Driving Tours and Off-Road Driving Tours” at the end of this document.

- *Welcome:* PCA's Off-Road Driving Tours are intended to be fun and safe events, with minimal environmental impact.
- *Introductions:* [Introduce all tour/group leader(s) and sweeper(s) and identify their vehicles.]
- *Waivers:* Have all tour participants signed the relevant waiver form(s)?
- *Insurance:* It is assumed each participating driver has a current driver’s license and automobile liability insurance. PCA also provides liability insurance that covers PCA, the Region, the event organizers and each participant while on the tour. If you intentionally separate yourself from the group, you may not be covered by PCA’s insurance.
- *Insurance certificate:* Inform attendees that the tour is covered under PCA Liability insurance and that the certificate is available for viewing at the time of the safety meeting.
- *Self-Inspection Checklist:* Ensure that all drivers have handed in the off-road driving tour self-inspection checklist for Category 3 Tours.

- *Emphasis on Safety:* Safety is paramount. Off road driving tours are NOT competitive or high-speed driving events. Off-road driving tours can be dangerous and involve increased risk. Each driver is responsible for operating their own vehicle safely, in all road conditions.
- *Laws:* Obey speed limits and all other traffic laws when driving on paved and/or named roads. When driving off-road, obey all off-road signs and cautions. Obey local laws regarding the consumption of drugs and alcohol.
- *Expected Conditions:* *[Inform the participants of the category of this driving tour and explain what type of conditions they can expect.]*
- *Route Directions:* The driving directions contain details about the route, regroup points, rest stops and any safety concerns or areas where the tour may have to slow to maintain safety. (The tour leader shall discuss any specific areas of concern in the driving directions.) *[Provide highlights/details about the route, rest stops and any safety concerns or areas where the off-road driving tour may have to make special allowances to maintain safety.]*
- *Waiting for the Car Behind:* When driving off-road, each driver is responsible to wait for the driver behind you – NEVER leave anyone behind – each car waits for the next vehicle to get through each intersection and each rough section of the route.
- *Following Distance:* Leave a safe distance between vehicles, which will be determined by the road conditions and terrain, with the primary factor being the ability of a following vehicle to safely avoid the vehicle in front in all conditions. When driving on paved roads, a safe distance is generally at least 2-3 seconds behind the car in front, however, do not leave excessive gaps between vehicles within the group.
- *Separation from the Group:* If you become separated from the group, inform the driving tour/group leader or sweeper.
- *Headlights:* Drive with headlights on to increase visibility to other vehicles.
- *Passing on Road:* No passing is allowed of the tour/group leader(s). They set the pace. Pass cyclists, pedestrians and other non-motorized traffic SLOWLY, giving a wide berth.
- *Passing Off Road:* Be patient when driving off-road. If it becomes necessary to pass another vehicle, only pass when the other vehicle is stationary. For vehicles passing on a hill, uphill has right-of-way. If there are other users of the trail who are driving faster than your group, pull aside to let them pass. Yield or give a wide berth to ATVs, mountain bikers, hikers and horses.
- *Spotters:* If it becomes necessary to use a spotter, the driver must follow the instructions of the spotter regarding how to safely clear any particularly challenging areas. Only one spotter shall be used at a time. A spotter must never be positioned in “harm’s way”. *[Review hand signals for turning right, left, straight, very slow and stop.]*
- *Route Safety:* If any of you have concerns about the safety of the route, let the *tour leader* know. It is their responsibility to decide whether it is safe to keep going, use an alternate route or turn back.
- *Departing Early:* If anyone chooses to depart the tour early, let the tour leader know so they can figure out a way to get you out safely. If you leave the group on your own, you may not be covered by PCA’s insurance.

- *Emergencies:* In an emergency, pull over, stop in a safe location, turn on emergency flashers and advise the tour/group sweeper.
- *Sweeper Role:* The sweeper plays an important support role and shall advise the tour/group leader of any issues within the group.
- *Communications:* [Provide cell phone numbers and radio channels of two-way radios of all tour/group leaders and sweepers to all participants or refer to them in the driving directions.]
- *Drones:* The use of drones must follow the PCA minimum standards for drone usage as outlined in the Drone Minimum Standards.
- *Safety & Fun:* Responsibility for maintaining PCA's excellent history of safe and enjoyable events rests with each participant. Have fun and be safe!

## **Attachment 1: Additional Recommendations for Off-Road Driving Tours**

These recommendations are provided in addition to the Minimum Driving Tour Standards and are based on past experience to enhance the success of regional tours. Region members charged with planning and executing such tours should read these additional recommendations and consider whether they would improve their tours.

### **□ Driving Tour Management**

- Every region conducting PCA driving tours should appoint a Driving Tour Chair, who should be identified on the Region's committee list submitted to PCA National.
- Regions that conduct driving tours should establish a tour leader training/mentoring program including, at a minimum, a training outline or webinar to brief new driving tour leaders.
- PCA's webinar "How to Conduct a Successful Driving Tour" provides useful information for new and returning tour leaders that is a good starting point for regional tour leader training.
- Driving tour leaders should read and follow the "PCA Insurance and Risk Management" guidance on PCA.org.

### **□ Tour Planning**

- Start planning early, especially if hotel and meal reservations are required.
- When planning the route, select a starting point and rest stop(s) that will facilitate the safe parking and controlled departure of all cars on the tour. Plan for a rest stop every 60-90 minutes. Make sure facilities can support the group(s).
- For tours that do not use electronic driving directions, driving tour directions should include each turn direction, leg distances and cumulative mileages after each leg, planned rest stops and notes/caution information along the route.
  - Establish regroup points and identify them in the driving directions (e.g., soon after leaving the starting location and thereafter at 4-way intersections/stoplights, etc.).
  - In addition to driving tour directions, provide a route map (from Google, MapQuest, etc.).
  - In order to avoid impeding other traffic and annoying members of the public, safely control the group(s), reduce the risk of becoming separated and enable radio communications, group sizes should be managed based on the area to be travelled, visibility of cars on the tour and the off-road driving tour experience of the group. Based on experience, group sizes of up to 20 cars work best for unpaved country/rural routes; group sizes of up to 15 cars are better for more challenging routes as the tour Categories (2, 3) increase.
  - In the week(s) prior to the event, pre-run as much of the route as possible in order to confirm the suitability of the route, and the accuracy and completeness of the route directions. In addition, search for online road closure information prior to the tour date to minimize surprises such as construction, road closures, poor road conditions, etc.
  - Consider contacting one of your sponsors, advertisers or local dealers to ask if they would like to provide a support vehicle, personnel or other support for the event.



## □ **Registration & Pre-Event Communications to Participants**

- Use a formal registration process to collect key information from each participant prior to the event, including: driver and passenger names; minor names (if any); cell phone number to be used on event day; email address; emergency contact information of someone not at the event. Established registration sites are useful for this purpose (e.g., MotorsportReg, Club Express, ClubRegistration, Eventbrite) and some online registration sites can be used to generate pre-printed waiver forms.
- Inform everyone to arrive at the starting point with sufficient fuel or fully charged EV's to complete the route.
- Tour leaders should notify participants of the total mileage and time that the tour will take.
- Notify all participants in advance that they must check in, sign the waivers, obtain the route instructions, and attend a safety briefing at the staging area.
- Provide all participants the opportunity to read the waiver forms (adult and minor) in advance via a link on [pca.org](http://pca.org), or by including it as a link on the registration site.
- Driving tours with more than one group get started more smoothly if attendees know in advance how the run groups will be organized at the staging area.
- The tour leader should assign the run group leader(s) and sweeper(s) prior to the date of the event and advise them regarding what is expected of their role prior to the tour date.
- The tour leader should inform the person(s) responsible to complete the Observer's Report regarding the Observer's role prior to the participant/safety briefing, where the form can be accessed online (must be logged on to [pca.org](http://pca.org) with user name and password).

## □ **Additional Points for the Safety Briefing**

- When driving as a group, it is not acceptable to take added risks, such as illegal passing, running red lights or cutting off another driver in order to stay with the group. Safety is more important than the need to stay together.
- In order to maintain the integrity of the group and enhance safety:
  - Don't lose sight of the car(s) in front or behind you.
  - Regularly check rear-view mirrors to confirm that the car behind is still following. If not, slow down until the car(s) behind you have caught up and it is safe to continue.
  - Do not allow excessive spacing to develop within the group. If you're lagging behind, try to keep pace with the car in front of you.
  - Beware of the accordion effect. Control your acceleration and deceleration in order to safely keep the group together.
  - Two-way radios or other communication devices should be in the lead and sweep cars and will be used to communicate about tour group issues.
- Be prepared to lead the group behind you if you become separated from the rest of the group in front of you.