



CASARA OTTAWA POLICIES AND PROCEDURES

Last update: 2015-04-05

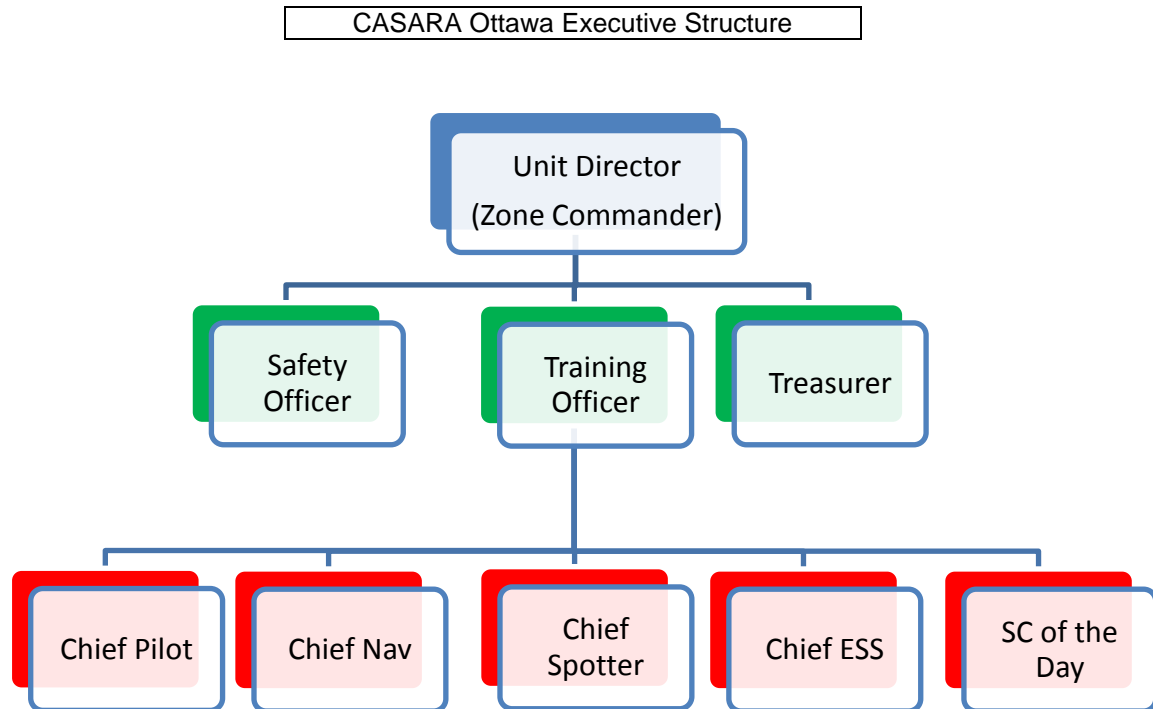
CHANGES

Release 2007.01.14	<ul style="list-style-type: none"> Created new document to replace the CASARA Ottawa Member Handbook 2006, and is based on a combination of the Terms of Reference, Sequence of Events, and Reimbursement Policy documents, and also the Nomination form issued with the annual letter.
Release 2007.01.14	<ul style="list-style-type: none"> Changed '6 in 90' to '8 in 120' for pilot recency requirements
Release 2008.01.20	<ul style="list-style-type: none"> Modified pilot recency requirements to include methods to regain currency
Release 2009.10.29	<ul style="list-style-type: none"> Multiple changes with regard to the executive positions, removed the SAREX SOP section, added an organization chart of the executive positions
Release 2010.01.12	<ul style="list-style-type: none"> Added "challenging abnormal/unsafe procedures", Operational – 2.0
Release 2011.01.14	<ul style="list-style-type: none"> Added procedures on the membership application process in CASARA Ottawa Clarified recency requirements for CASARA Ottawa pilots Multiple editorial changes made to clarify the responsibilities of the Chiefs, claims process, and CASARA Ottawa Executive structure.
Release 2011.02.22	<ul style="list-style-type: none"> Modified recency requirements in accordance with new policies established by CASARA Ottawa Clarified that all members have the right and responsibility to challenge abnormal/unsafe procedures
Release 2011.05.02	<ul style="list-style-type: none"> Added requirements and clarification on calculating fuel factors for aircraft operating cost reimbursement Clarified the requirements for 'potential' and 'probationary' members in completing their membership applications.
Release 2011.10.26	<ul style="list-style-type: none"> Clarified recency requirements for pilots on training flights
Release 2015.04.05	<ul style="list-style-type: none"> Deleted Chief Search Coordinator as executive position. Minor editorial changes to Chief Pilot and Chief Nav responsibilities. Minor editorial change to Treasurer responsibilities regarding electronic delivery of expense payments. Minor editorial changes to Member responsibilities. Minor editorial changes regarding Operational Safety. Added SOP regarding sign-in procedures, debrief requirements and reporting requirements. Clarified reimbursable expenses. Deleted "Multiple Fuel Sources" statement. Changes to election process for executive.

TERMS OF REFERENCE	1
POLICIES AND PROCEDURES	4
TRAINING, REGENCY, AND OPERATIONS	4
OPERATIONAL SAFETY	4
ADMINISTRATIVE	5
Standard Operating Procedures	5
CASARA Ottawa Membership Requirements	5
CASARA Ottawa Membership Application Policy	5
CASARA Ottawa Reimbursement Policy	6
ELECTIONS AND NOMINATIONS	9

TERMS OF REFERENCE

CASARA OTTAWA is the only CASARA unit in Zone 12 (Ontario), and the DIRECTOR, CASARA OTTAWA, is also the ZONE TWELVE COMMANDER.



The DIRECTOR is responsible to CASARA Ontario for the maintenance of a properly trained, properly administered and operationally effective Search & Rescue Unit. The DIRECTOR is responsible to the Joint Rescue Co-ordination Centre (JRCC), Trenton, for the provision of aircraft with trained crews, spotters for military aircraft and, as the need arises, operations control staff for search operations. The DIRECTOR is responsible for liaison with all organizations external to CASARA OTTAWA with which it is necessary to maintain contact. In particular the DIRECTOR maintains, or arranges to maintain, contact with the JRCC on a 24 hour a day, 7 days a week basis. The DIRECTOR represents CASARA OTTAWA at CASARA Ontario meetings. The DIRECTOR also holds final responsibility for all matters relating to CASARA OTTAWA activities, will ensure that membership information will be maintained for all members, and will ensure the safe keeping of that information in adherence to the principles and practices for the protection of personal information as set out in CASARA Policy. Furthermore, the Director will ensure that members are included in the normal lines of communication on matters pertaining to their roles and responsibilities. The Director, or their designate, acts as the Chair of the Executive Committee and of the general meetings. The DIRECTOR's actions are governed by the CASARA National and Provincial Policy Manuals, and by CASARA Ontario By-Laws.

The TRAINING OFFICER is responsible to the DIRECTOR for training and monitoring the effectiveness and operational readiness of members. The TRAINING OFFICER has a staff of four: the Chief Pilot, the Chief Navigator, the Chief Spotter, and the Chief Electronic Search Specialist. The TRAINING OFFICER is generally responsible for establishing training and performance objectives for all members of CASARA Ottawa and determining member's competencies in their respective area(s) of training. The TRAINING OFFICER is particularly responsible for:

- a) preparing an annual training schedule, and arranging for the conduct of the training, that meets the minimum requirements set out in policies at local, provincial, and national levels of the organization.
- b) scheduling First Aid and any other recommended (or requested) specialized training
- c) ensuring the record of individual training activity in CMS

The CHIEF PILOT is responsible to the TRAINING OFFICER for:

- a) monitoring the training status of all CASARA pilots in the unit, their initial flying qualifications, and their currency in flying hours, in night qualification, and in CASARA training flights.
- b) Provide and/or assist in pilot training specific to CASARA.
- c) arranging that each pilot is given a personal check-out to ensure that his flying ability meets appropriate standards of safety and competence to CASARA standards.
- d) assisting as required in the preparation of qualifying examinations for pilots and administering this exam as required.
- e) acting as an advocate for the pilots' interests.

The CHIEF NAVIGATOR is responsible to the TRAINING OFFICER for:

- a) monitoring the training status of all CASARA navigators.
- b) Provide and/or assist in navigator training.
- c) assisting as required in the preparation of navigator qualifying examinations and administering these examinations as required.
- d) performing evaluations of navigation accuracy.
- e) acting as an advocate for the navigators' interests.

The CHIEF SPOTTER is responsible to the TRAINING OFFICER for:

- a) monitoring the training status of all CASARA spotters.
- b) providing assistance in spotter training.
- c) assisting as required in the preparation of the spotter qualifying examination, and administering the exam as required.
- d) acting as an advocate for the spotters' interests.

The CHIEF ELECTRONIC SEARCH SPECIALIST (ESS) is responsible to the TRAINING OFFICER for:

- a) monitoring the training status of all ESS personnel.
- b) providing assistance in ESS training.
- c) assisting as required in the preparation of ESS qualifying examinations and administering these examinations as required.
- d) acting as an advocate for the ESS personnel's interests.

The SEARCH COORDINATOR (S/C) OF THE DAY is responsible to the TRAINING OFFICER for the implementation and management of a SAREX. This is a rotating, volunteer position and is intended to provide a training environment to prepare for managing a SAR Actual. In partnership with the TRAINING OFFICER, the S/C of the DAY is generally responsible for the development and implementation of a SAR scenario that addresses particular training objectives set out by the TRAINING OFFICER. The S/C of the DAY is particularly responsible for acting as Search Coordinator (S/C) in the Operations Room and:

- a. for arranging to have targets, including exercise ELT transmitters, placed for air and/or ground crew's use
- b. to prepare taskings and briefing material for all air and ground crews

- c. the provision and supervision of Ops Room equipment
- d. that communications equipment used during operations is manned by competent operators.
- e. the co-ordination of transportation of personnel, equipment and/or supplies required by the unit during operations

The TREASURER is responsible to the DIRECTOR for the following tasks:

- a) maintain a bank account for the unit.
- b) collect annual fees from members of the unit.
- c) maintain a record of the financial standing of the unit, including all receipts and expenses.
- d) prepare cheques for the signature of the appropriate executive members for all payments approved by the executive or electronically deliver approved payments.
- e) prepare and submit all claims to CASARA Ontario resulting from authorized activities, and arranging payment to the individual CASARA members as appropriate.
- f) prepare financial and budgetary statements for the executive as required, including statements on the budget provided by CASARA Ontario, the budget based on CASARA Ottawa fees, and expenditures occasioned by SAR actual operations covered by JRCC, OPP, or any other agencies as needed.
- g) hold and maintain hard-copy records of attendance and activity for all Unit events.

The SAFETY OFFICER operates independently and promotes safe operations of both air and ground resources. The SAFETY OFFICER may raise safety concerns with anyone in the Unit. The SAFETY OFFICER has access to the DIRECTOR on issues of safety without impediment. The SAFETY OFFICER may also communicate directly with the Provincial Safety Office as the need arises. The SAFETY OFFICER is responsible for developing and maintaining an Emergency Response Plan for use by Operations Room staff and has a duty to advise CASARA Ottawa's executive of any member exercising continuous unsafe practices.

A UNIT MEMBER is responsible for upholding the principles of CASARA and adhering to the policies set out at the National, Provincial and local unit level. In order to be tasked, members are responsible for the following:

- maintain currency in each role for which they hold certification
- Currency in Standard First Aid is recommended if a member of the operational air or ground crew roster
- report any safety related concerns to the Safety Officer, the Unit Director, or the Provincial Safety Officer, as appropriate. Reports can be made anonymously.
- maintain a record of their activity in a CASARA Ottawa Logbook
- secure SAR documentation. All documents (sketches, debrief notes, maps, electronic track data, etc.) are the property of CASARA Ottawa and may not be released without the consent of the DIRECTOR or designate.

POLICIES and PROCEDURES

CASARA Ottawa is bound by policies set out in the CASARA National Policy Manual and the CASARA Ontario By-Laws, furthermore, CASARA Ottawa sets out the following policies and procedures for its members and activities:

TRAINING, RECENCY, AND OPERATIONS

CASARA Ottawa is committed to providing safe and effective crews and staff to respond to SAR operational tasks. The Chiefs and Officers of CASARA Ottawa plan training and monitor members' participation in order to provide a reasonable distribution of activity throughout the year. In particular, CASARA Ottawa ensures that an appropriate level of flying activity is regularly undertaken by all qualified CASARA Ottawa pilots by conducting monthly reviews of training records and/or pilots' logbooks. In addition, CASARA Ottawa sets the following minimums for qualified CASARA Ottawa pilots:

- 1) Before accepting a tasking to fly as PIC on a SAR Actual Tasking each qualified CASARA Pilot must meet the requirements outlined in CMS, CASARA Policy and Transport Canada regulations. In addition they must also have the following:
 - a) a minimum of 1 hour as PIC on an approved CASARA Search Activity (training or Actual) within the past 90 days

A SAR Actual Tasking is any activity directly or indirectly associated with or in response to a SAR Actual initiated by JRCC, OPP or any other appropriate authority who has requested assistance of CASARA Resources.

- 2) Before accepting a tasking to fly as PIC on a CASARA Tasking, each qualified CASARA Pilot must meet the requirements of CASARA Policy as well as Transport Canada Regulations. In addition they must also have the following:
 - a) a minimum of 24 hours flying as PIC, as defined in CMS, within the past 365 days
 - b) a minimum of 1 hour as PIC flight time, of any type, in the past 90 days

A CASARA Tasking, in this context, refers to activity associated with CASARA Flying Training.

It is expected that each CASARA Ottawa Pilot will undertake and meet the requirement of maintaining applicable currencies, before accepting any tasking, independent of reimbursed CASARA activities. It is expected that each CASARA Ottawa Pilot will maintain an accurate accounting of their flying activities in CMS.

OPERATIONAL SAFETY

1. CASARA members, upon determining an impending abnormal or potentially unsafe operational procedure, have the responsibility to challenge the procedure, request normal or alternate procedures be used.
2. The successful outcome of a SAR task or training event depends on the safe and effective efforts of all members involved. To ensure safe and effective operations no CASARA Ottawa member will act in any operational CASARA capacity:
 - a. within eight hours after consuming an alcoholic beverage;
 - b. while under the influence of alcohol; or
 - c. while using any drug that impairs the person's faculties to the extent that either the safety or effectiveness of the operation is compromised in any way.
 - d. when under any physiological(*) or psychological(**) burden

The senior executive officer present (the Unit Director, Operations Manager or other designate) will challenge and if necessary disqualify from operations any person for whom faculties are in doubt until such doubt is allayed.

Every CASARA Ottawa member will bring to the attention of the senior member present, or the Unit Safety Officer or designate, any member (including himself/herself) who they believe to be impaired by any of (a) through (d) above.

This policy recognizes that CASARA members may not be professionally trained to assess physical or psychological impairment, but also that the safety of the members and effectiveness of the operation are paramount. Any person challenged or disqualified must bear this in mind when dealing with the feelings that a challenge or disqualification will bring about. Any challenge should be made with due consideration of the challenged member's dignity and right for privacy.

(*) Physiological burdens include but are not limited to: insufficient food and water; insufficient rest; sunburn; heat exhaustion; motion sickness; washroom facility availability.

(**) Psychological burdens include but are not limited to: stress; emotional state; relationship problems; interpersonal conflict."

ADMINISTRATIVE

Standard Operating Procedures

CASARA Ottawa requires that all members sign in on CASARA Form P100 when arriving at all CASARA events. This includes academic meetings, training events and actuals. Where a limited number of members are involved, the team leader shall be responsible for completing the P100 Sign-In sheet and ensure that the sign-in sheet is submitted to management for entry into CMS. All members are expected to sign out when departing from the event.

For all flying and ground events, crews are required to conduct a full operational debrief without delay after returning to base.

For all JRCC taskings, crews are required to complete a SAR Ops report without delay after returning to base and promptly submit to JRCC.

CASARA Ottawa Membership Requirements

CASARA Ottawa looks for the following qualities in our members:

1. an ability to work collegially with others,
2. a commitment to safe and effective operations,
3. a willingness to learn, to share and impart knowledge
4. a willingness to work in support of the goals and objectives of our local Unit and of CASARA in general.

Acceptance, or continuance, of membership in CASARA Ottawa is based solely on the actions of applicants within the operational scope of the Unit for the duration of the membership period.

CASARA Ottawa Membership Application Policy

The CASARA membership period is from April 1st to March 31st of the following year. CASARA Ottawa receives membership applications throughout the year and focuses on membership renewals in January of each year, in advance of the official membership period.

New applications - upon submission of a signed application form, the applicant will be considered to be on probation, may participate in any CASARA activities they choose, be issued training material and logbooks, and be covered under the CASARA insurance policy. The potential member will be granted access to on-line policy and training documents and shall familiarize themselves with the contents before signing the membership application form. Once accepted, the new member will be issued a CASARA Ottawa ID card, a CMS log-in, granted access to their electronic records, and may participate in CASARA Ottawa elections. CASARA Ottawa will endeavour to perform a review within 3 months and can accept the new member with a simple majority vote of the CASARA Ottawa Executive.

Renewing applications – renewals are normally submitted in January but can be submitted at any time through the year. Renewals may be subject to a review and acceptance of the membership renewal application requires a simple majority vote by the CASARA Ottawa Executive.

CASARA Ottawa Reimbursement Policy

Expenses to be reimbursed are intended to offset the cost of operating aircraft and ground vehicles and, in some cases, meals and accommodations. The purpose of this policy is to clarify for the members which expenses will be reimbursed and when. There are three occasions on which CASARA Ottawa members can expect to be reimbursed for certain expenses:

- A locally held training exercise
- A remotely held training exercise
- A 'SAR Actual' or tasking issued by JRCC or OPP

Details:

1. Locally Held Training Exercises
 - The definition of 'local' is any location within a 30 nautical mile radius of Ottawa International Airport (CYOW) and includes such airports as Rockcliffe, Smiths Falls, Arnprior, and Carp.
 - Aircraft Expenses (only those aircraft identified as SAR resources will claim operating expenses):
 - Transit flights – debrief form required
 - Target placement flights – debrief form required
 - Air tasking flights – debrief form required
 - Comms platform flights – debrief form required
 - Other flights may be reimbursed at the discretion of the Unit Executive
 - Ground Vehicle Expenses (only those vehicles identified as SAR resources will claim operating expenses):
 - Ground taskings – debrief form required
 - Comms platform – debrief form required
 - Other activity may be reimbursed at the discretion of the Unit Director
 - Meals and Accommodations
 - Expenses will not be reimbursed unless pre-approved by the Unit Director
2. Remotely Held Training Exercises
 - Aircraft Expenses (only those aircraft identified as SAR resources will claim operating expenses):
 - Transit flights – debrief form required
 - Target placement flights – debrief form required
 - Air tasking flights – debrief form required
 - Comms platform flights – debrief form required

- Other flights may be reimbursed at the discretion of the Unit Director
- Ground Vehicle Expenses
 - Vehicle rental charges, including all extra insurance fees – bill directly to CASARA Ontario, include customer copy of agreement
 - Fuel costs – receipts required
 - Expenses for the use of personal vehicle will not be reimbursed unless pre-approved by the Unit Director
- Meals and Accommodations
 - Only reimbursed at the discretion of the Unit Director
 - Expenses will not be reimbursed unless pre-approved by the Unit Director

3. JRCC or OPP Tasking

- **Claims can only be made if a Case Number has been issued.**
- Aircraft Expenses:
 - Transit flights – debrief form required
 - Air tasking flights – debrief form required
 - Comms platform flights – debrief form required
 - Other flights at the request of JRCC or OPP
- Ground Vehicle Expenses:
 - Transit from home to rendezvous point or commence search point and return – record kms on claim form, reimbursement to all personal vehicle(s) for all participants
 - Ground taskings – debrief form required, reimbursement to the tasked vehicle(s) only
 - Other activity at the request of JRCC or OPP
- Meals and Accommodations
 - All participants to claim the current per diem rates for meals – sign-in sheet required and record duty day on claim form
 - All participants to claim any accommodation costs – receipts required and sign-in sheets

Reimbursement Calculations:

In recognition of the many factors influencing the calculation of aircraft reimbursement rates, CASARA Ottawa publishes the following guidelines for its members. In cases where these guidelines are not applicable, the member shall refer the matter to the Unit Director and/or Executive for clarification.

1. Aircraft Operating Costs

- It is recognized by CASARA Ottawa members that the reimbursement rate does not necessarily cover the full cost of all aircraft operations, nor is CASARA required to cover the full cost of maintaining operational currency of its pilots. However, best efforts will be made to ensure a fair and equitable distribution of reimbursement amongst CASARA Ottawa members.
- The process of reimbursement for aircraft operating costs is applied equally to single-owners, multi-owners, renters, and “borrowers” regardless of the type of aircraft used or the level of participation of members.

2. Use of Automotive Fuel (mogas)
 - In keeping with the Safety Standards set by CASARA Ontario, CASARA Ottawa pilots will not use mogas for CASARA flights. It is recognized that mogas may be present in a member's aircraft (as allowed by STC and/or TC) but that any "top-ups" or "fill-ups" in preparation for, or during the course of, CASARA events will be of an appropriate aviation fuel.
3. Fuel Rates
 - Retail Fuel: CASARA Ottawa members shall perform their aircraft reimbursement calculations using the cost of fuel as provided by the FBO *before* any discounts are applied. That is to say:
 - club members, non-members, and renters will use a non-member FBO rate of fuel
 - regardless of the payment method (credit, credit card, or cash) the member will use the undiscounted, non-member rate of fuel
 - Wholesale Fuel: members who use non-FBO fuel shall provide a "statement of cost" to support a fuel rate that reflects the cost of fuel plus a mark-up that covers any incidentals associated with maintaining private fuel storage.

ELECTIONS AND NOMINATIONS

The CASARA Ottawa Executive consists of the elected Officers the Unit: Unit Director (Zone Commander), Training Officer, Chief Pilot, Chief Nav, Chief Spotter, Chief ESS, Chief Search Coordinator, and Treasurer.

CASARA Ottawa holds elections every year. The annual elections alternate between the following positions:

Odd Numbered Years	Even Numbered Years
Unit Director (Zone Commander)	Training Officer
Chief Navigator	Chief Pilot
Chief Spotter	Treasurer
	Chief ESS

Any active, paid member of CASARA Ottawa may be nominated and seconded for any position by any other current, paid member. The deadline for submitting nominations shall be one week prior to the February meeting.

Every member who has paid dues for the current fiscal year may vote. The vote shall be taken by secret ballot at the March meeting. In the event that a member cannot attend the meeting they may give their proxy to another member, or directly to the ELECTORAL OFFICER, to vote on their behalf. The person carrying a proxy will present it to the ELECTORAL OFFICER the night of the vote. The ELECTORAL OFFICER may hold multiple proxies and a member may carry only one proxy.

Pertinent information such as the nomination form, the identity of the ELECTORAL OFFICER, all nomination deadlines, and the date of the vote will be provided with the annual letter issued during the January meeting. Completed nominations will be accepted by mail, email, or by hand. Nominations must be received by the ELECTORAL OFFICER, on or before the date listed in the annual letter. For a nomination to be valid it must contain the name of the person making the nomination, the name of the member who has seconded the nomination as well as the position for which the individual has been nominated.

The ELECTORAL OFFICER will disseminate the identity of the candidate(s) to the membership on or before the February academic meeting. Dissemination of this information will occur as each nomination is submitted by the most practical means available, such as:

- a) posting to the Unit's website
- b) distribution of an email
- c) telephone
- d) mail-out

All candidates will have the opportunity to speak for up to five (5) minutes at the February meeting at which time members will be encouraged to ask questions of the candidates.

A description of the duties of each position is listed under the section "Terms of Reference" found in this document.