

68. Key to adequate staffing and supervision of EOTC events are staff competence for the task; ratios; professional development of staff; and preparation of volunteer assistants. This section addresses these cornerstones of *Safety and EOTC*.

69. Ministry of Education and former Department of Education policy has emphasised the importance of ensuring enough suitably experienced and skilled staff lead and assist with EOTC events. Yet analysis of the deaths and serious injuries in outdoor activities (both school and recreational) over the last decade has shown inadequate supervision to be a major contributing factor.

70. Successful and safe EOTC events can be assured when a school has:

- competent staff;
- adequate supervision of the event; and
- adequately briefed volunteer assistants.

► **Competence**

71. Staff competence is critical to safety in EOTC. Effective leadership of and assistance with EOTC events are inextricably linked to safety. If the school does not have staff with the required competence for a planned activity, they should adjust the activity to match staff competence. Alternatively, they could contract an outside provider in order to meet the desired learning outcomes and safety requirements.

72. The following are recommended **core competencies** for leaders of EOTC activities:

- ability to teach/instruct;
- outdoor pursuit skills: qualification OR attestation of equivalent skills/experience to match selected activities;
- current first-aid certificate;
- ability to identify and manage risks;
- crisis management skills;
- leadership skills;

- group management skills;
- environmental skills; and
- cultural values.

73. The following are **desirable personal attributes** of EOTC leaders:

- empathy;
- communication skills;
- flexibility;
- motivation;
- self-concept;
- sound judgement;
- problem-solving ability;
- physical fitness;
- being safety conscious;
- being approachable;
- assertiveness; and
- ability to say no.

► **Competence for outdoor pursuits and adventure education activities¹⁸**

74. The board of trustees must ensure that the leader and other supervisors are suitably competent when running outdoor pursuits and/or adventure activities. Competence can be demonstrated when the leader holds the relevant award, where it exists, or it can be attested that they have equivalent skills and experience. Where an award does not exist for an activity, for example, river tubing, possession of best practice requirements for running that activity must be demonstrated. Awards and best practice for different outdoor activities are covered in Section 7.

¹⁸ See Appendix II, EOTC – Related terms.

Ratios

75. A ratio compares the number of skilled/experienced supervisors with the number of novices involved in an EOTC event. It is important that the ratio is high enough to ensure a high quality learning experience and safe event. Ratios for EOTC are hard to prescribe as they will vary according to student needs, age group, activity, location and competence of staff involved.

76. If in doubt, be conservative and/or seek professional advice when deciding on ratios. A list of professional outdoor bodies is included in Appendix VI, Resources and contacts. Decisions on ratios should take the following into account as part of the risk assessment:

- competence of staff;
- competence of volunteer assistants;
- first-aid cover;
- sex, age, behaviour and ability of students;
- special needs of students (medical, educational);
- duration and nature of activity – land-based, water-based;
- nature of site;
- site requirements (for example, permits);
- contingency options;
- access to emergency services; and
- season, weather forecast.

Ratio case studies

77. A very important point to keep in mind when deciding on ratios is that not all adults have the experience and skills to be a supervisor. Here are some examples to illustrate this.

1. A kayaking trip on a grade two river involving:
 - one instructor holding New Zealand Outdoor Instructors Association Kayak 1 Award;
 - one teacher with 10 years experience leading and participating in kayak trips up to grade three;

- one parent with no kayaking experience;
- seven novice year 12 students.

After considering all the factors in paragraph 76, this school decided on a supervisor to novice ratio of 1:4 (one skilled supervisor per four novices).

Note: The parent was counted as a novice in this activity.

2. A walk through the Botanical Gardens involving:

- one teacher;
- three parents with previous experience supervising students on local excursions;
- 28 year three students.

After considering the factors in paragraph 76, this school decided on a supervisor to novice ratio of 1:7 (one adult supervisor per seven children).

Or

The ratio could be 1:9 (one adult supervisor per nine children) with the teacher remaining free to supervise the overall group.

Note: All parents are counted as supervisors in this activity. If a parent had a pre-schooler with them, then they should not be counted or used as a supervisor.

Person in charge

78. In general, one person should be in charge of the EOTC event. This should ideally be a teacher employed by the board, who has proven competence in leading such events. (See also, contracting outside providers below.) With a large group, this person should be free of directly supervising students to maintain an overview. In addition to the person in charge, there should be enough supervisors to cope in an emergency.

79. During the planning phase of an EOTC event, the person in charge should have an under-study (deputy). This person should be familiar with all aspects of planning, in case the person in charge is unable to attend the event at the last minute, or has to leave the event while it is in progress. Clear role definitions should be developed during the planning phase and lines of responsibility established.

80. When events are run in remote areas or involve hazardous activities, the ratio should match the higher level of risk involved.

▶ **Staff development and training – from the reality to the ideal¹⁹**

81. While some individuals possess some (or many) of the core competencies and desired personal attributes, the person who has them all is, of course, rare. This being the case, how can schools run quality programmes without perfect leaders?

82. Staff development and training are an effective means of improving leader competence in EOTC. There are many ways to achieve that training. Three major components are:

- personal experience in the activity (relevant to New Zealand conditions);
- co-leading – under supervision; and
- formal training, for example, outdoor first-aid, activity skills courses, safety management courses.

83. Schools can also make efforts to promote staff development and help staff move beyond present competencies toward perceived ideals. The following eight strategies can go a long way to acknowledging and addressing the realities of school EOTC programmes:

- tailor programmes according to available expertise whilst striving for the ideal;
- aim to hire the best staff available, looking for those who are keen to learn and grow, thereby having long-term potential;
- contract competent providers. Develop a long-term relationship with them. Apprentice less experienced staff alongside them to strengthen their skills/experience base;
- keep programming flexible in order to incorporate existing staff strengths;
- match staff with complementary strengths to make the staff ‘as a whole’ closer to the ideal;
- adjust variables such as location, ratios, trip goals and activities to staff competence for programme success;
- offer training in the core competencies and desired personal attributes; and
- keep staff up-to-date with EOTC issues through professional reading and involvement in professional associations. Schools can subscribe to appropriate journals and publications.

▶ **Contracting outside providers**

84. If outside providers are required in order to meet best practice requirements for running an EOTC event, the school should have procedures in place to contract them. A check should definitely be made to ensure they are reputable and meet best practice requirements. Sample form 14 (Appendix V) can assist with this. The school should also prepare a contract for services and clarify the provider’s roles and responsibilities in writing. Sample forms 15 and 16 (Appendix V) may be helpful with these aspects.

85. *Even when an outside provider is contracted by the school to provide services, the board of trustees is still responsible for student safety. So a teacher involved in the event should be delegated to carry out this responsibility. To assist in a situation where there may be disagreement between the teacher and provider, a mechanism should be put in place to resolve the difference in the field. The following is a suggested addition to the agreement between the school and provider (sample form 16, Appendix V):*

86. Dispute between provider and school staff. If there is a dispute between instructor/s and school staff regarding a decision before or during an activity, the most conservative view must be the one followed (that is, the one that provides the highest standard of safety and care to students).

▶ **Parents and other volunteers**

87. Some EOTC events require extra supervisors to supplement school staff. These people should be carefully selected by the school. Ideally they should be well-known to the school and student group, and have proven supervisory skills. In most cases, schools should not plan to leave students in the sole charge of voluntary assistants.

88. Selection and screening of volunteers who wish to be supervisors or drivers should be done by the teacher in charge and the principal at an early stage. If there is any doubt about the suitability of an adult volunteer, further investigations should be made. If doubt remains, that adult should not be approved to assist with the event. Some schools may wish to have police vetting carried out on volunteers, especially for residential events.

¹⁹ Adapted from Teschner, D. P., and Wolter, J. J. (1990). Beyond minimum competencies: Toward an integrated model of staff growth and development. In J. C. Miles, and S. Priest, (Eds), *Adventure education* (pp 275-284). Venture Publishing Inc., State College, P.A.

89. For safety reasons, it is not advisable for volunteer supervisors (or school staff) to bring extra children on EOTC events. They cannot effectively supervise a group of students when their focus is elsewhere.

▶ **Student leaders**

90. There are sound educational reasons for involving senior secondary and tertiary students as leaders in programmes for junior students. This is an excellent opportunity for them to develop their leadership skills. They can be supervisors of groups provided they have the appropriate skills, experience and maturity for:

- the activity;
- the group; and
- the environment.

91. Student supervisors should not be put in a sole charge role. They need to be adequately briefed and trained beforehand and be under the direction of a competent supervisor during the activity.

▶ **General supervision guidelines**

92. All supervisors of EOTC activities should have clearly identified roles and responsibilities within their capabilities. It may be helpful to have this in writing (see sample forms 9 and 10, Appendix V).

- All supervisors should be fully briefed on the activity and safety procedures.
- For the safety of both adults and students, no supervisor should be alone with a student at any time.
- Supervisors should be assigned to a specific group of students where possible.
- All supervisors should:
 - know what the safety plan is;
 - have an opportunity to get to know their group early on;
 - carry a list of the names of all students in their group;
 - be aware of students who require closer supervision;

- have appropriate information about special needs or behavioural problems;
 - involve students in safety systems; and
 - set up buddy or team support structures.
- The person in charge should have readily accessible lists of all students and supervisors, with medical profiles and other pertinent information.
 - Head-counting of students should happen regularly on all types of EOTC event.
 - There is no place for alcohol or illegal drugs on a school EOTC event. Responsibility for supervision extends into recreation times and overnight on some EOTC events. Alcohol impairs a person's ability to provide a high level of supervision and to respond to an emergency at any time.

▶ **How a school determines the staffing and supervision requirements of its EOTC programme**

93. This can be done in a number of ways, depending on the size of the school and extent of its EOTC programme. Whatever way is chosen, the following information is needed:

- an inventory of EOTC events run over a year, identifying the skills and experience required to run each activity safely;
- a stock-take of staff skills and experience; and
- finally, the two should be matched to identify any gaps between existing and required competence of staff.

▶ **EOTC event inventory**

94. An inventory of EOTC events should be compiled that identifies the competencies required to run each activity safely (using accepted best practice). This may be done by the EOTC co-ordinator and a few key staff using a year planner. In larger schools, each department may need to complete their own inventory and submit it to the EOTC coordinator for collation. A review process may be required to add or delete activities on a term-by-term basis. This allows for opportunities to meet student needs and take advantage of spontaneous opportunities and the “teachable moment”.

95. This process should be carried out well in advance. The final inventory could take the following form:

Month/date/s	Curriculum area	EOTC event	Skills/experience required ²⁰

▶ **EOTC staff skills and experience stocktake**

96. This can specifically focus on EOTC or be part of a general stocktake of staff qualifications, skills and experience for professional development purposes. Sample form 9 in Appendix V could be adapted for this purpose. The information in the fourth column in the table above would be useful for adapting sample form 9.

▶ **Identifying the gaps**

97. The information collected in the EOTC event inventory and EOTC skills and experience stocktake need to be compared in order to identify any gaps in staff competence and desired personal attributes to run EOTC programmes. Once the gaps are identified, the school has several options.

98. Short-term, the school could:

- adjust the activity to fit within existing staff competence; or
- contract expertise to run the activity.

99. Long-term, the school could:

- encourage and support staff to gain more logged experience and attend training courses to upskill in the activity to an appropriate level of competence; and
- as vacancies arise, employ staff with the desired skill set.

▶ **EOTC training and qualification providers**

100. A number of organisations provide training and qualifications/awards suited to teachers of EOTC.

• **Education Outdoors New Zealand (EONZ)** offers a range of safety management training opportunities to teachers and boards of trustees.

This training is school-specific and generic in nature. It can be applied across the entire range of EOTC events a school may run, from a farm visit to a multi-day journey. EONZ also offers the Outdoor I Award. This is a baseline award for teachers leading groups overnight on clearly formed tracks.

• **New Zealand Outdoor Instructors Association (NZOIA)** offers awards in abseiling, bush, caving, kayaking, wall and rock climbing, canoeing, outdoor safety management and outdoor.

• **New Zealand Mountain Safety Council (NZMSC)** offers awards in abseiling, alpine, bush, firearms, hunts, outdoor first aid, outdoor leader and risk management.

• **Water Safety New Zealand (WSNZ)** offers training in water safety in beach, pool and river environments.

• **Project Adventure New Zealand (PANZ)** offers training in adventure-based learning, facilitation skills, leadership skills and safety skills and standards.

• **Sir Edmund Hillary Outdoor Pursuits Centre of New Zealand** offers training in skills for outdoor leaders and various outdoor pursuits such as tramping, rock climbing and kayaking.

• A number of polytechnics offer one, two or three-year courses in outdoor leadership, outdoor education, or adventure tourism.

• Some colleges of education offer training in EOTC.

101. For contact details of training organisations, see Appendix VI, Resources and contacts. For further information on training and development opportunities related to EOTC, see www.safeoutside.org

²⁰ Must be consistent with best practice for the activity. See Section 7.