

Workshop

EOTC Guidelines
Bringing the Curriculum Alive

Facilitator's Resource

March 2011



An EONZ-NZAEE-MSC project funded by SPARC

Contents

Workshop Introduction.....	3
Programme Summary.....	3
Welcome and Setting the scene.....	4
Chapter 1. Bringing the Curriculum Alive.....	6
Chapter 2. Learning Safely: A Shared Responsibility.....	7
Chapter 3. Planning.....	9
Chapters 4 & 5. Staffing and Supervision; Making Good Decisions.....	32
Chapters 6 & 7. Legal Responsibilities; Codes of Practice & Accepted Best Practice..	16
Chapter 8. Emergency Preparedness.....	19
Wrap up and Evaluation.....	22
Education for sustainability and education outside the classroom.....	23
The Mangatepopo Incident.....	25
Learning from fatalities in outdoor education – some key points.....	28
The National Incident Database (NID).....	30
Leader qualifications.....	33

Workshop Introduction

This resource brings the new EOTC Guidelines (2009) alive, highlighting key components of the Guidelines. It includes a range of activities to explore how these Guidelines can support you to provide EOTC opportunities for your students. The activities are designed to generate discussion in your school or organisation. EOTC is curriculum-based learning that extends the four walls of the classroom. As such, each school needs to develop ways these Guidelines best support them to deliver quality EOTC activities to meet the learning needs of their students.

Education Outdoors New Zealand (EONZ), New Zealand Association for Environmental Education (NZAAEE), New Zealand Mountain Safety Council (MSC) have worked together with funding from SPARC to develop and deliver this resource. Many organisations and people contributed. We would like to thank all of those who have taken the time to comment and give feedback on the earlier drafts of this resource.

The writing team was Arthur Sutherland, Gemma Periam, Robyn Zink, and Stu Allan. Fiona McDonald coordinated the process.

Programme Summary

8.45am–10.45am	15 minutes break	11.00am–12.15pm
<ul style="list-style-type: none">• Welcome• Setting the scene• Chapter 1 <i>Bringing the Curriculum Alive</i>• Chapter 2 <i>A Shared Responsibility</i>		<ul style="list-style-type: none">• Chapter 3 <i>Planning</i>
45 minutes lunch		
1.00pm–3.00pm	15 minutes break	3.15pm–4.30pm
<ul style="list-style-type: none">• Chapters 4 & 5 <i>Staffing & Supervision Making Good Decisions</i>• Chapters 6 & 7 <i>Legal Codes of Practice Accepted Best Practice</i>		<ul style="list-style-type: none">• Chapter 8 <i>Emergencies</i>• Wrap up• Evaluation

8.45am Welcome & Setting the scene

45 minutes

Overarching key messages

- EOTC consists of all curriculum-based teaching and learning outside the classroom, including sport
- The EOTC Guidelines support the national curriculum, both The New Zealand Curriculum and Te Marautanga o Aotearoa
- Each activity requires planning
- Education for sustainability is fundamental to EOTC

Welcome

Welcome everyone and introduce yourself briefly.

Point out the toilets, tea & coffee, and a place to leave coats and bags.

Indicate emergency exits and assembly area, and any hazards in the room, e.g. cables or lifted carpet.

Setting the scene (getting to know the group)

Categories

- What sector of education are you from?
Kura kaupapa, primary, intermediate, secondary, provider
- What is your role within your organisation?
Teacher, senior teacher, syndicate head / HOD, EOTC coordinator, senior manager, other
- How long have you been working in education?
Less than 5 years, 5–10, 10–20, 20+

Yes / No questions

- Did you attend professional development workshops on *Safety and EOTC* in 2004–2005?
Yes / No (count and record)
- Have you used the National Incident database (NID)?
Yes / No (count and record)

Continuums (you need a large space to move about)

- Are you familiar with this document?

Never seen it before today, seen it but haven't opened it, read some parts, used parts of it, read it in detail

- For those who have used it, what do you consider are the main differences?
- Have you reviewed practices in light of this new document?
Yes / No (count and record)
- How, e.g. categorising activities for approval?

Partner share: Underlying theme 'critiquing current practice and being future focussed'.

Different partner for each question? Report out / hear a selection of responses... listen out for / acknowledge commonalities and differences.

- Share something about your programme or system you're proud of.
- Share something you want to work on or revisit.

Administration

Check all participants have signed in checked and amended their **contact details** if necessary.

Reiterate that the workshop runs from 8.45am to 4.30pm and you expect all participants have arranged to stay the whole time.

Please ensure that participants complete the **workshop evaluation** before they leave (including any who leave early).

Expectations of the workshop

This workshop aims to update participants on current practices in EOTC. The focus is on both **learning and safety**. Both will be explored during the day, along with factors relating to EFS.

Take this opportunity to connect with others who run similar programmes or who are dealing with similar issues so you can support each other in developing your programmes. To build on this, we expect participants to return next year for Workshop 2, which will focus on:

1. Working with you on your systems and EOTC programme.
2. Unpacking a toolbox of web-based EOTC resources currently being written.

We strongly encourage **participants to become facilitators** in their own organisations and to share any relevant information. The facilitator package will be available on the EONZ website, enabling you to choose what is pertinent to your organisation.

Introduce the **Participant's Workbook** and the concept of **starter questions**.

Ask participants to answer **questions 1–4**. Get feedback and explain

how these will be used throughout the workshop to critique current practice and consider future action.

An **Action Plan** will be used throughout the workshop to help you determine the steps you will take to update practices in your programme.

9.30pm Chapter 1. Bringing the Curriculum Alive

30 minutes

Whakatauki (5 minutes)

What does the whakatauki mean for you? Share with your neighbour.

Key messages

- Each EOTC activity should have a purpose that relates to the national curriculum
- Consciously identify the best venue for each activity

Starter questions (5 minutes)

Participants individually answer **questions 5–7** in their workbook.

Activity (15 minutes plus 5 minutes for the conclusion)

Reviewing an activity

Objective: Link an EOTC activity to the key competencies. Use the *Teaching as Inquiry* model to understand why and how an EOTC activity meets the learning needs of the students.

Instructions

1. Get into **small groups**.
2. **Choose an activity** that a group member was involved in (from Starter question 3 in the *Participant's Workbook*) and that all members have some understanding of.
3. **Discuss** the following points in relation to that activity and briefly **report back** on the discussion:
 - Why choose this activity to develop the vision, principles, values and key competencies in the national curriculum for your students? **Pages 7–9, paras 10–14**
 - What is most important that is worth spending time on, given where your students are at? (Focusing inquiry). **Page 9, paras 15–16**
 - What strategies (evidence based) are most likely to help students achieve the learning outcomes? (Teaching inquiry).

Pages 10–11, paras 17–26

- What happened and how will I find out? (Learning inquiry).

Page 12, para 27

Personal actions (5 minutes)

1. In this workshop, ask participants to note any actions for their own programme.
2. In your school, identify on a map all possible EOTC venues that might support curriculum delivery within walking distance of your school.

10.00am Chapter 2. Learning Safely: A Shared Responsibility

45 minutes

Whakatauki (5 minutes)

What does the whakatauki mean for you? Share with your neighbour.

Key message

- Learning and safety go hand in hand
- Everyone shares responsibility for quality learning and safety
- Principles of sustainability and cultural practices are integral to quality learning

Starter questions (5 minutes)

Participants individually answer **questions 8 & 9** in their workbook.

Activity (35 minutes)

Note: Acknowledge the shift from the sail boat to the waka and why this has occurred.

Waka analogy

Materials

- PowerPoint slide of a waka.
- Large sheets of paper (A2 minimum), marker pens, blutac.

Instructions

- A. Divide into **eight small groups**. If the group is too small, consider combining government and national bodies, and person in charge and EOTC coordinator.

Give each group one of these **contributing groups**:

1. Person in charge / mata ariki (flag).
 2. EOTC coordinator / tiratū matua (mast).
 3. Activity leaders / hoe urungi and hoe ākau (rudders).
 4. Board of trustees and principal / ngā riu(hulls).
 5. Students / rā matua (mainsail).
 6. Assistants / rā tauaki (foresail).
 7. National bodies / kīato (cross-beams).
 8. Government / ngā takere (keel).
- B. Ask each contributing group to brainstorm some **key responsibilities** of your group for ensuring that:
- Quality learning occurs in an EOTC activity.
 - This learning occurs safely.
 - Principles of sustainability and cultural practices are applied?
- In turn ask one or two people from each group to:
- Stick their sheet of paper on the appropriate part of an image of the waka projected onto the wall.
 - Talk to their list.
 - Invite discussion.
- C. On completion, discuss the **analogy of the waka** to shared responsibility. This discussion is useful in determining how each group has a different key role.
- D. **Summarise.**

Activity explanation

Resources: PowerPoint image of a waka projected on the wall, large sheets paper and markers, blutac.

Don't focus only on safety. Note the participants' responsibilities for learning, education for sustainability, and cultural practices. See the *Education for sustainability and education outside the classroom* background notes.

The waka activity allows for discussion on both the concept and the specific responsibilities of each group. In the staff competence sections, highlight their competence for leading learning.

What does the document say?

- Waka analogy: **Pages 17–18, paras 52–53**
- Specific responsibilities: **Pages 19–24, paras 54–61**
- Summary: **Page 24, paras 62–64**

Personal actions (5 minutes)

1. Ask participants to note any actions for their own role in their programme.
 2. Read the section on specific responsibilities for your role in the EOTC programme.
-

10.45am Break

15 minutes

11.00am Chapter 3. Planning

75 minutes

Whakatauki (5 minutes)

What does the whakatauki mean for you? Share with your neighbour.

- Planning starts with intended learning
- Paperwork should be proportionate to the level of risk, focused on significant risks
- A systems approach is most effective
- Reviews keep systems alive
- Clear communication among all stakeholders is critical

Starter questions (5 minutes)

Participants individually answer **questions 10 to 16** in their workbook.

Note that although chapter 3 is entitled *Planning*, all eight chapters are about planning. Chapter 3 is an overview of the planning process and is primarily about using a systems approach.

Activity 1 (5 minutes)

Objectives: Participants understand the key questions / areas that must be covered when planning an EOTC activity, that planning is a systematic process, and that plans require regular reviewing.

In a small group, **brainstorm** and list the key questions / areas that must be covered in the planning process for an EOTC activity. Leave this list to the side.

Activity 2 (30 minutes)

Sound Log: *Exploring the planning required for an EOTC experience*

In **groups of three**, plan a night activity – The Sound Log – for an overnight camp. For the purpose of this exercise, the camp venue is this workshop venue.

1. **Read** the following scenario for a Year 8 class:

The class has been building towards an overnight camp all term. It's their first overnight camping experience and will occur **in the school grounds** on a Friday night. It will start at 3pm. They will set up camp, do some activities they have been working on during the term, and then they will cook dinner. After dinner, once it's dark, they will do the sound log activity. They go home the following day at 9.30am after breakfast and a clean-up.

A sound log involves students sitting still in one place for 15 minutes recording the sounds they hear. They also need to reflect on how these sounds make them feel.

The aim of the sound log activity is to make them more aware of their environment, to learn how to observe and collect data, use and reflect upon this data for expressive writing. They have also started drawing their responses to the sounds around them. They have conducted this activity in a number of different environments including the classroom, the school grounds, and the local botanical gardens.

The aim of the evening activity is to give them an opportunity to compare the day-time and night-time noises in the school ground.

2. Your group of three will need to go outside to do a **site inspection** as part of this planning process. In the planning the group needs to:

- Organise the activity.
- Identify any hazards, risks with this activity.
- Identify what documentation do you need to support the planning? Why?

Question: Did you address all of the key questions / areas in your brainstorm (if not, why not)? Are there other questions / areas that you need to add to your brainstorm list?

Discussion: One thing that has changed from the previous document is recognition that paperwork must be proportionate to the activity and the level of risk in that activity.

Does your organisation have the right level of documentation?

Approval and consent (5 minutes)

An area that has been of some concern to teachers and schools is around obtaining approval and consent for an activity.

Discuss briefly in groups:

- If you were running this overnight camp in your school / organisation, who would you need to get approval / consent from and why?
- What information would you need to provide people with?

Activity 3 (25 minutes)

Card sorting activity

Use the card sorting activity to get people thinking about these questions of approval – they're not expected to solve this problem here.

Resources (in the *Facilitator's Tool Box*)

A bag containing:

- A grid template.
- Four envelopes: parental consent cards, approval cards, activity cards, and Board of Trustee cards.

Instructions

In **pairs**:

1. Choose a context of either current practice in your organisation or a future practice.
2. Study the grid template.
3. Allocate the activity cards to the appropriate section of the grid template.
4. Allocate the approval cards to the appropriate section of the grid template.
5. Allocate the parental consent cards to the appropriate section of the grid template.

Note that there must be communication between:

- School and parents.
- Staff running an activity.

Page 29, para 78; Page 32, paras 90–97

Ask participants what 'informed consent' means in the context of EOTC, e.g. would the participants / parents know what is involved in the activity you used in the card sort exercise?

Discussion for the whole group:

- Are participants clear on what documents make up their safety plan?
- Do they know where they can go to get further information on this?
- What does it mean to use a systems approach? Note that rather than blaming individuals, accident investigators tend to focus on

how the organisation's safety system failed, e.g. Erebus plane crash, Cave Creek Platform collapse, Mangatepopo incident.

Page 28, paras 70–71

- When do you review your planning documents? What happens with the information gained through review? How's it passed on to others or incorporated into the programme?

Pages 48–49, paras 172–175

Personal actions (5 minutes)

Ask participants to note any actions for their own programme.

Resources

- *EOTC Guidelines: Bringing the Curriculum Alive*. Appendix 4, sample form 24.
- *OutdoorsMark* audit tool: www.outdoorsnz.org.nz
You can use this audit tool to check the safety planning for an organisation's overall programme.

12.15pm Lunch

45 minutes

1.00pm **Chapter 4 & 5. Staffing and Supervision; Making Good Decisions**
75 minutes

Whakatauki (5 minutes)

What do the whakatauki mean for you? Share with your neighbour.

Key messages

- Competent staff and clear roles and responsibilities are the key to learning safely
- Match staff competence and supervision structures to effectively supervise the activity

Starter questions (5 minutes)

Participants individually answer **questions 17 to 26** in their workbook.

Resources

- *Outdoor Activities: Guidelines for Leaders* (2009).
- The Mangatepopo Incident background notes.
- Two examples of supervision structures (in the *Facilitator's Tool Box*).
- The leader competency photos in the *EOTC Guidelines*.

Pages 20, 13, 16, 17, 56

Supervision structure

Explore what is meant by 'supervision structure' and the components of an effective supervision structure through an activity, brainstorming, and examples.

Activity (5 minutes)

Objective: Get people moving after lunch and explore the metaphor that when roles and responsibilities are clear one is less likely to run around in circles.

Instructions

Designate a **flat open area**. This walking-only game requires people to 'look out for each other' and 'touch tag on the shoulder.'

1. Round one: **Everyone is it!**

Each person tags as many other people as possible without being tagged themselves. If someone is tagged, they must turn around on the spot two times before they may carry on and tag others.

2. Round two: **Team leader tag!**

A nominated TIC (tagger in charge) supervises two or three taggers (depending on the size of the group) who are responsible for tagging all the others. The TIC and taggers need to have a 30-second session to plan how they're going to tag the rest of the group as quickly as possible. The TIC stands at a corner of the designated area and coordinates the tagging efforts. Once tagged, a person must stand in an area by the TIC and the game is over once everyone is tagged.

Discussion (5 minutes)

- In round one, who did you look out for?
- Who were you trying to tag?
- What happened in round two?
- How does the game relate to your experience of supervising a group during an EOTC event? The focus is on roles and responsibilities.

Brainstorm the 10 factors of an effective supervision structure (5 minutes)

Compare the brainstorm with **page 42, para 150**. (5 minutes)

Consider the examples of supervision structures provided in **page 43, para 152** and in the **supervision handout** (in the *Facilitator's Tool Box*). 10 minutes

Share (by way of conclusion for the supervision structure section)

A school or an organisation should set a maximum ratio/s for a supervision structure in ideal circumstances after considering all the factors

Note: There are issues raised about the level of supervision associated with the Mangatepopo incident: was the ratio 1:5 (instructor and teacher, and 10 students) or 1:11 (instructor, teacher and 10 students)?

Leader competency

Identify, record, and share in groups the leader competencies for one or more of the photos in **pages 20, 13, 16, 17, & 56** (5 minutes)

Read page 35, para 112 and answer the question through a discussion with your neighbour : What is meant by 'knowledge of **sustainable practices**'? (5 minutes)

Share. The Guidelines provide substantive comment on competent staff and the ways the board can ensure, through the principal, that activity leaders and the person in charge of the event are competent for the job.

Give participants 5 minutes to highlight the points made.

Pages 35–36, paras 110, 111, 114, 115, 116, 117, and 118.

Personal reflection (5 minutes)

Reflecting on your responses to the starter questions and the activities in this session, was the activity you led operating under an effective supervision structure?

Leader qualifications (5 minutes)

Refer to the Outdoor Leader Qualification and the other leader qualifications (see the *Leader qualifications* background notes).

Looking ahead to Workshop 2 (5 minutes)

The Guidelines provide comment on a number of items that participants may want help with in Workshop 2. They are:

- Use of contractors. Page 41, paras 134–135
- Position of Provisionally Registered Teachers (PRTs) as leaders.
Page 41, para 136
- Use of parents, whānau, and community volunteers.
Page 41, 139–142
- Use of students as leaders. **Page 42, paras 145–146**
- Judging a provider. Page 48, paras 171–179

Workshop 2 will be designed based on your requests.

Conclusion (5 minutes)

'To ensure adequate staffing and supervision of EOTC activities it's essential to have competent staff / personnel; clearly defined roles and responsibilities for all involved; and adequate ratios and effective supervision.' **Page 35, para 109**

Regarding the competency of staff there's nothing new in the guidelines. However, recent 'analysis of serious incidents that occurred during EOTC activities shows that a lack of leader competence and ineffective supervision were major contributing factors.'

Page 35, para 110

'...the BOT must ensure, through the principal, that activity leaders and the person in charge....are competent for the job.' **Page 35, para 111**

Personal actions (5 minutes)

Ask participants to:

- Read chapter 5 after the workshop.
- Look at their organisational systems to see what process exists to establish a supervision structure.
- Note any actions for their own programme.

2.15pm **Chapters 6 & 7. Legal Responsibilities; Codes of Practice & Accepted Best Practice**
45 minutes

Whakatauki (5 minutes)

What does the whakatauki for chapter 6 mean for you? Share with your neighbour.

Key messages

- There are legal responsibilities which everyone must observe
- Leaders must be aware of the relevant codes and accepted best practice

Starter question (5 minutes)

Participants individually answer **question 27** in their workbook and share with their neighbour.

Resources

- *The Mangatepopo Incident* background notes.
- Appendix 2 of the *EOTC Guidelines*.
- NZ Outdoor Access Code pamphlet in the *Facilitator's Tool Box*.
- *Outdoor Activities: Guidelines for Leaders*, Mountain Safety Council manuals, and Water Safety NZ River Safety DVD.
- Environmental Care Codes: www.doc.govt.nz/parks-and-recreation/plan-and-prepare/care-codes/

Hierarchy of responsibilities

Note that there is a hierarchy of responsibilities. Refer to the **PowerPoint diagram**:

1. Legislation.
2. Codes of practice.
3. Formal accepted best practice.
4. Informal accepted best practice.

1. Legislation

Lead a discussion based on what the guidelines say about the Education Act and the HSE Act. (10 minutes)

- The **Education Act** – provides the reason for teachers' being and provides for the wellbeing of students.

Page 54, paras 202–205 talk about the NEGS, NAGS and national curriculum.

- The **Health and Safety in Employment Act** (HSE Act) is primarily about employment and volunteers but also states the duty of care owed to others. Consider each of the six bullet points in the guidelines plus a seventh one – *monitor that policy and procedures are implemented*. **Page 54, para 206**
 - DOL charged OPC under the HSE Act in relation to its responsibilities to the instructor (employee) and its responsibilities to visitors to the site (the teacher and students). See *The Mangatepopo Incident* background notes.
 - The HSE Act on workplace. A **place of work** is defined very broadly as 'any place (including part of a building, structure or vehicle) where any person is to work, is working for the time being, or customarily works **for gain or reward**'.
 - Other legislation includes the **Crimes Act** (a duty of care is imposed on those 'in charge of dangerous things' and 'in charge of dangerous acts'), Food Safety Regulations, and the Land Transport Act.

Increasingly, regional authorities are introducing **bylaws**, e.g. the Queenstown Lakes District Council and the Auckland Council require boaties to wear a lifejacket.

2. Codes of practice (5 minutes)

Whakatauki

What does the whakatauki for chapter 7 mean for you? Share with your neighbour.

Starter questions (5 minutes)

Participants individually answer **questions 28 & 29** in their workbook and share with their neighbour.

Read page 56, para 223

Share: You must follow the standards that apply to EOTC activities, e.g. employees using protective clothing and equipment, storing fuel and ropes, operating a school pool, dealing with an incident, and using a ropes course. **Pages 57–59, paras 226–235**

These days, ropes course systems tend to be called 'operating procedures.'

3 & 4. Formal and informal accepted best practice (5 minutes)

Read page 56, paras 224–225

What do you understand by 'accepted best practice' versus 'current

accepted practice'. Record and then discuss in small groups. Facilitator to share their definitions or share what the **Glossary, page 70** says.

Refer to *Outdoor Activities: Guidelines for Leaders*, Mountain Safety Council manuals, and Water Safety River Safety DVD, and links in the *Participant's Workbook*.

Consider the care codes, including the NZ Outdoor Access Code (Walking Access Commission). Refer to the pamphlet.

Refer to the EOTC Guidelines Toolkit Appendix 2

Where do we turn when there appears to be a gap? See **Page 60, paras 238–240**

Governance responsibilities, accountability, and liability

Read and draw from **Page 53, paras 194–199** (5 minutes)

Conclusion (5 minutes)

- In education circles, the legal chapter is highly regarded as succinctly capturing the responsibilities and accountabilities under NZ law.
- With students at the centre there are statutory requirements and obligations for boards.
- Society's expectations around safety are increasing and so you need to understand governance responsibilities, accountabilities, and liability.

Personal actions (5 minutes)

Ask participants to note any actions for their own programme.

3.00pm **Break**

15 minutes

3.15pm Chapter 8. Emergency Preparedness

55 minutes

Whakatauki (5 minutes)

What does the whakatauki mean for you? Share with your neighbour.

Key messages

- An emergency plan is essential
- You should practice and review your emergency plan regularly
- Incident recording and analysis is essential

Starter questions (5 minutes)

Participants individually answer **questions 30, 31, & 32** in their workbook.

Activity (15 minutes)

Scenario role play

In **small groups** set this up outside with appropriate space between groups for them to work independently.

Trip to the zoo (Years 5 & 6 or Year 9):

A student spots a friend from another school across the car park, rushes off the bus, runs across the car park to meet their friend, gets hit by a car, and is in too much pain to get up.

As a group role play this situation and its management.

Discussion (15 minutes)

- Debrief the role play by asking each group in turn to contribute the steps they took to manage the incident. Use the Ngaruawahia High School generic crisis management plan steps as a framework to fill in the gaps:
 1. What did you do first?
 2. What roles did you allocate?
 3. What information did you need?
 4. What course of action did you take?
 5. Who did you communicate with? (How and when? How did you manage others' cellphones?)
 6. How did you resolve the situation?
 7. Did you discuss a debrief, support, incident recording, and review?

- Discuss the need for a plan and people who know how to manage a crisis. Draw from the role play scenario.
- Discuss practising the emergency plan (and whether it shows that the venue is appropriate).
- Discuss the National Incident Database (NID), incident recording, and analysis.
- Provide examples of lessons learnt and changes made: free time, kitchen burns, and gas cookers. See the background notes *The National Incident Database (NID)*.

Personal actions

Find the organisation's Incident Register and see if it:

- Records EOTC incidents and near misses.
- Rates them for severity.
- Has been reviewed regularly and has led to change of policies and / or procedures.

Resources

- Example of crisis management plans: Ngaruawahia High School: www.eonz.org.nz
- Andrew Brookes' research summary notes: *Learning from fatalities in outdoor education*.
- NID reporting form: www.incidentreport.org.nz/resources/NID_recreational_form.pdf
- Severity scale: [www.incidentreport.org.nz/resources/Incident %20Severity_Scale.pdf](http://www.incidentreport.org.nz/resources/Incident_%20Severity_Scale.pdf)
- Incident analysis. See *The National Incident Database (NID)* background notes.

Notes

- If things go wrong, what are you going to do? **Page 61, para 247**
- Planning for emergencies can be part of your safety management plan, or part of more generic crisis management plans. **Page 62, paras 249–250**
- It's also critical to have people leading an EOTC activity who have the ability to respond methodically to manage a crisis effectively.
- Appropriate and timely communication is critical with emergency services, the rest of group, the school, parents, and the media. **Pages 62–63, paras 253–258**
- People must have ready access to a qualified first aider.

Page 66, paras 267–277

- Andrew Brookes' analysis of fatalities suggests that only in rare circumstances can a fatality not be prevented by planning. See the background notes *Learning from fatalities in outdoor education*, which summarises some of his research.
- **Incident recording:** The HSE Act states that 'Every employer...shall record...every accident that harmed (or, as the case may be, might have harmed)...' Each organisation should have a policy indicating what this means in practice regarding the level of severity.

Definition: Page 62, para 248

- Incidents resulting in serious harm must be reported to DOL.
Page 64, para 260
- **The National Incident Database (NID)** provides a central point for any person or organisation involved in leading outdoor activities to record incidents. **Page 64, paras 261–262**
- Why use it? There are lessons to be learnt from incident analysis that help improve our practice. Your school may not have sufficient incidents to identify a trend but the NID may do.
- List incidents (including near misses), identify trends, and identify changes that could be made to practice. Near misses are important to consider (an accident can also be a near miss). Schools should have in place a process to review incidents and act on findings on a regular basis. **Page 66, para 263–264**
- Below are two examples where recording and analysing incidents led to changes in practice:
 - Staff at a large intermediate school recorded the injuries they had on their camps and found a clear majority occurred in unsupervised **free time before dinner**. The school now structures and supervises this time.
 - An outdoor centre noticed over a period of time that they had a number of **burns in the kitchen**. They made a lot more oven mitts available.

Personal actions (5 minutes)

Ask participants to note any actions for their own programme.

4.10pm **Wrap up and Evaluation**

20 minutes **Wrap up** (15 minutes)

Individually:

- Review the points noted in the Action Plan column in the *Participant's Workbook* and transfer to the Follow-up Action Plan
- Note down any additional action points
- Highlight the three points that require the most urgent action
- Identify any support / resources needed to implement these action points

Bring the whole group together and ask:

- Can you identify anything you would like to see in Workshop 2?
- What else would you've liked from this workshop?
- What was the most useful aspect of this workshop?

Evaluation (5 minutes)

Hand out the evaluation sheets and collect them back in before the participants leave.

4.30pm **Finish**

Education for sustainability and education outside the classroom

Education for sustainability (EfS) is learning to think and act in ways that will safeguard the future well-being of people and our planet. It's about maintaining an expectation of, and facilitating learning that empowers students to participate in taking informed action¹. Research into teaching and learning in education for sustainability² has shown that an action orientation brings to life the key competencies of *The New Zealand Curriculum* (p.12), as it requires students to combine *knowledge and understanding, attitudes, and values in ways that lead to action*. In EfS terms, this is about developing student action competence. Action competence is the heart of EfS, and interweaves knowledge, learning how to learn and applying learning in authentic contexts³.

Education outside the classroom (EOTC) contributes to the goal of action competence in EfS. Six aspects of action competence have been identified: experience, reflection, knowledge, vision for a sustainable future, taking action for a sustainable future, and connectedness. EOTC *experiences* are critical in enabling students to explore, examine, and investigate the environment, and through planned and guided *reflection* develop important understandings and *knowledge*. Having a range of *experiences* in the environment is known to engage students, build skills, grow commitment and *connectedness* to support *action taking for a sustainable future*.

Being in the environment also provides opportunities for students to experience a diversity of views, learn to evaluate differing values and opinions with consideration of sustainability from four key angles or aspects: the environmental, cultural, social, and economic⁴. These aspects take the view that people are part of the environment and therefore environmental and sustainability issues are deeply rooted in society. One of the greatest challenges we face today is people's disconnection from the environment and how this manifests in environmental issues within society. For example, do students know where their water comes from, or where it ends up once they've used it? How well do they understand the processes that enable them to eat a ham sandwich for lunch? More simply for young students, it may be knowing that milk comes from a cow as opposed to the supermarket.

EOTC is vital in enabling a re-connection between people and the environment and the world they live in. The notion of connectedness is especially relevant with respect to Māori perspectives of the environment where all life is interconnected through ancestry

¹ For more information on 'taking action', see <http://efs.tki.org.nz/EfS-in-the-curriculum/Taking-action>

² For more information, see <http://tlri.org.nz/investigating-the-the-relationship-between-whole-school-approaches-to-education-for-sustainability-and-student-learning>

³ For more information, see <http://efs.tki.org.nz/EfS-in-the-curriculum/Taking-action/Action-competence>

⁴ For more information, see <http://seniorsecondary.tki.org.nz/Social-sciences/Education-for-sustainability/key...>

and whakapapa, as children of Ranganui and Papatūānuku⁵. Including and developing these perspectives as part of EOTC in EfS needs to be an important facet of learning experiences.

Therefore, from an EfS perspective EOTC should include an exploration of our relationship to outdoor learning places and consideration of how those places contribute to overall learning outcomes. For some this may be an acknowledgement to the place, deciding on an appropriate 'care code' for the exercise, and considering these in the after activity reflection. At this end of the continuum, learning is focused on sustainable practices – while we are here, how can we ensure minimum impact? For others, seeking to understand the place or environment from multiple perspectives, develop knowledge, understanding and skills in order to take action for a sustainable future will be the foremost purpose for being there. At this end of the continuum, learning is focused on questioning, investigating, and knowing – why are things this way? Is there a sustainable alternative? Can we participate in that alternative or make it happen?

Wherever your programme or learning experiences sit on such a continuum, there's a challenge with *The EOTC Guidelines: Bringing the Curriculum Alive* to support students to re-orient their thinking about the environment and sustainability – to take on a longer term view, to show curiosity and concern for the earth, and to develop the ability to make change where it's needed. This in turn will see us all as being responsible for the choices that will shape the kind of earth handed on to future generations.

⁵ For more information, see www.teara.govt.nz/en/papatuanuku-the-land/1

The Mangatepopo Incident

April 2008

Information on the incident can be found at www.opc.org.nz/mangatepopo.php, particularly the coroner's recommendations and the responses from the Sir Edmund Hillary Outdoor Pursuits Centre (OPC).

Discussion of the incident can be found in the *NZOIA Quarterly*, Issue 54.

Most OPC responses relate specifically to Mangatepopo Gorge trips. However, they raise wider issues such as those outlined below.

Does the activity relate to educational objectives?

Although the Mangatepopo Gorge trip may have been driven by educational objectives, a commitment to a 'water day' and the instructor's lack of known options may have been contributing factors to the incident.

The implication is that outdoor leaders need to know the venues and activities that will enable them to achieve their educational objectives, and which ones are appropriate in different circumstances.

Are staff adequately trained?

The health and safety legislation requires staff to be adequately trained or supervised by someone who is. Presumably, the test is whether staff competencies match accepted best practice. The competencies required are indicated by NZOIA, MSC, EONZ, Skills Active, Surf lifesaving, Swimming NZ and other syllabuses, although standards require external benchmarking.

There's debate as to whether focusing on a systematic approach is faulty, and whether the focus should be on employing highly competent staff. It may be more helpful to regard recruiting, inducting, training, and monitoring staff as one part of a systematic approach, possibly the key part.

Since the incident, Department of Labour (DOL) prompting has brought a focus on monitoring, primarily to check that policies and procedures are being implemented.

Is the supervisory structure adequate?

The accompanying teacher wasn't trained to take a leadership role in the gorge, making the leader to participant ratio 1:11. Given the environmental hazards, the instructor's inexperience, and the nature of the participants (some under stress, some non-swimmers, and one with a partial disability), this ratio appears unsuitable.

Counting accompanying adults (especially teachers and parents) as leaders, irrespective of their training and experience, may often occur in outdoor education. The implication is that each person must be assessed as a leader or a participant before determining the ratio.

Are the roles and responsibilities clear?

DOL argued that the OPC Field Manager should have closed the gorge, that is, the

decision to enter the gorge or not shouldn't have been left to the instructor.

The implication is that a 'command model' is most effective. Given the manager's access to updated weather information, that may have been the case in this situation. However, it wasn't OPC's policy for the manager to sanction trips, and staff in the field will often have the best information to make decisions. OPC's review noted it would have been very difficult to '...micromanage instructors in the field by remote control'.

It does point to organisations being clear around who makes decisions. Because there's uncertainty around the exact nature of a discussion between the OPC manager and the instructor, it also illustrates the need to communicate clearly.

Are the weather forecasts sufficiently detailed and up to date?

OPC was criticised for not subscribing to a more detailed weather forecast (the MetService's severe weather warning alerts). How widely applicable this issue is will depend on the vulnerability of each activity to the weather, but it does point to accepted best practice requiring more information than was sought in the past.

Similarly, venturing into the snow without an avalanche advisory or onto the sea without a marine weather forecast isn't accepted best practice.

Also, although OPC received a forecast at 6.15am, that forecast was compiled at 1.18am. Part of it was read to instructors at 8.00am. The group entered the gorge at about 12.30pm, raising the issue of what updated weather information should an activity leader access.

Is the water level rising or falling?

It's accepted best practice to set a maximum river flow level for an activity. The incident points to the need to know more than this – the instructor needed to know whether the river was rising or falling.

Obviously, this applies to a range of activities, not just canyoning.

Are the communications adequate?

Accepted best practice is that a group must be able to communicate immediately where practicable. The coroner suggested that if communications weren't possible, then minors shouldn't be taken on the activity.

However, communications aren't practicable for caving, or for many other activities at times. Accepted best practice is to map 'dead zones' and to mirror the aviation practice of communicating with the base when entering and leaving such zones.

Does the safety planning focus on significant hazards?

OPC hadn't fully identified the hazards associated with an upstream gorge trip despite having detailed planning documents. Lengthy paperwork (including detailed risk management forms) can obscure which hazards are the most significant.

What practicable steps weren't taken?

Although the health and safety legislation requires employers to take all practicable steps, it doesn't prescribe those steps. When there's a fatality, analysis will likely reveal

some practicable steps that could have been taken. The Department of Labour first charged OPC with 18 omissions, which they reduced to these two:

1. OPC didn't obtain adequate weather information.
2. OPC didn't close the upstream gorge.

When staff have become comfortable with an environment, external audits or peer reviews may notice omissions, although they didn't in this case.

Is there learning from previous incidents?

Although OPC often changed its policies after incidents, and regularly reviewed incidents, it didn't fully build the learnings into the induction of new instructors.

Potentially, this applies to all organisations. Shared learnings from use of the National Incident Database could be especially powerful.

Who has final responsibility?

The focus of the court hearings was on OPC's responsibilities as an employer. OPC was prosecuted for breaching its duty of care to an inexperienced employee. The DOL informed the school that it had met its legal requirements and wouldn't be prosecuted.

However, schools do have final responsibility for their students, whether they run the programme themselves or contract an outside provider – see *EOTC Guidelines: Bringing the Curriculum Alive*, particularly paragraphs 193–194, 210, and 171.

Learning from fatalities in outdoor education – some key points

Drawing on the work of Andrew Brookes (2003a; 2003b; 2004).

Some key findings from Brookes' work on outdoor education fatalities in Australia between 1960 and 2002 are summarised. One of his aims was to examine common patterns that might exist across cases. While he describes only Australian cases his findings are useful for New Zealand outdoor educators. Three points will be discussed here. The first is why it is important to analyse these cases. Second is the need for planned supervision structures. Third is the need to plan for emergencies.

Why analyse fatalities

Brookes (2003a) makes the point that fatalities in outdoor education are rare and most of us will never deal with one. Lessons learnt from everyday outdoor education practice are essential to quality programmes. But fatalities can arise from a specific set of circumstances that are not necessarily recognised through common-sense or experience. There are patterns common to many programmes.

Supervision

- Supervision is not just about student – staff ratios. It is about what staff are expected to do. What they understand their roles and responsibilities to be. Given all of the demands placed on them, what they are actually competent to do.
- There is a difference between supervision and expert judgement.
- The most striking area (in relation to fatalities) of loose or absent supervision (either planned or unplanned) is of teenage boys around moving water or steep drops.

There are several considerations for supervision.

- Outdoor education requires a special emphasis on supervision structures and practices, both during planned activities and in the spaces in between.
- There must be tight supervision around moving water or steep ground
- Periods of general supervision should be planned to take place where there is no steep ground or moving water (Brookes notes that it is probably not educationally desirable to have constant close supervision, but levels of supervision must be planned)

Emergencies and rescues

Better planning for emergencies and rescue could have saved lives.

- Rescue or emergency situations involve a sudden change of state from normal operations. Situations can change very quickly from one where teachers feel comfortable to one they are uncomfortable in and have no experience of.
- Planning for a rescue or emergency requires deliberate attention.

- There is a strong case for calling assistance sooner rather than later. A precautionary view of any potentially serious incident should be taken.
- Emergency communication should be planned and tested.
- Know local organisations that operate in the area. They may understand the situation and be able to offer more immediate assistance.

References

- Brookes, A. (2003a). Outdoor education fatalities in Australia 1960–2002. Part 1. Summary of incidents and introduction to fatality analysis. *Australian Journal of Outdoor Education*, 7(1), 20–5.
- Brookes, A. (2003b). Outdoor education fatalities in Australia 1960–2002. Part 2. Contributing circumstances: supervision, first aid, and rescue. *Australian Journal of Outdoor Education*, 7(2), 34–42.
- Brookes, A. (2004). Outdoor education fatalities in Australia 1960–2002. Part 3. Environmental circumstances. *Australian Journal of Outdoor Education*, 8(1), 44–56.

The National Incident Database (NID)

www.incidentreport.org.nz

The National Incident Database (NID) is a central database to record incidents and near misses that occur on outdoor programmes. It allows you to quickly summarise and analyse your incident data and compare it to national trends. The NID provides:

- A standard method for collecting and analysing outdoor incident data.
- An easy to use incident-reporting format that meets health and safety legislation requirements.
- Identification of incident trends.
- Data to inform on current and emerging practices.
- An opportunity to contribute to New Zealand's outdoor safety culture.

You can find a comprehensive guide on how to register with the NID and how to log incidents at: www.incidentreport.org.nz/resources/OER_NID_Guide.pdf

What is an incident?

'An incident is an event where there is, or might be, harm to people, damage to property, or interruption to process. Incidents include any event where intervention is required, for example, a fatality, a near miss, an injury, an illness, property damage, or a behavioural problem that leads to, or might lead to harm.' (MoE, 2009, p. 71).

How NID can help you

Incident reporting is part of a good review system. An annual report is produced summarising the incidents for the year. The New Zealand Mountain Safety Council is launching a quarterly newsletter with up-dates based on data from the NID. NID helps you to identify any incident trends in your own organisation and compare your incidents to other organisations.

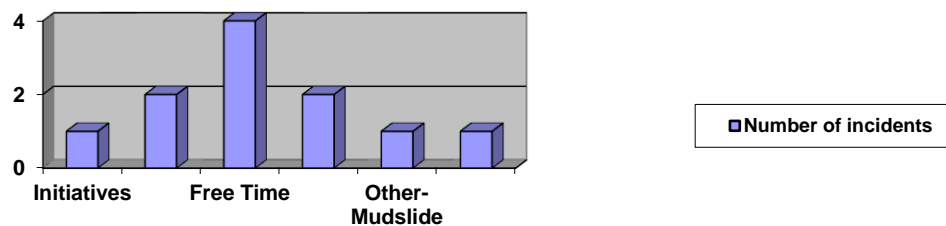
Here are two examples of how the National Incident Database (NID) can help you deliver good quality EOTC activities. The first example comes from a New Zealand Mountain Safety Council (MSC) 2010 newsletter. The second is drawn from data in the 2010 NID report.

What's happening in your organisation?

It's an interesting exercise to ask yourself or your colleagues when they think incidents are occurring, and similarly in which activities incidents occur. People are often surprised to learn of the number of incidents that occur in non-structured time / free time.

The reporting features added to the NID last year makes analysing incidents quick and easy. It is an excellent tool to graphically illustrate to staff, BOT etc, your incidents and trends. For example, the time of day filter, which just requires the ticking of a box, illustrates the time of day in which your incidents are occurring.

Below is an example drawn from the database of an organisation who contributed 11 incidents last year. (This chart was achieved by simply ticking the filter box on the generating reports area of the NID). The graph clearly indicates the majority of incidents occurred during free time. There are a number of things that should be taken into consideration when looking at this chart including, the percentage of time that participants spend in free time, as this may be the largest portion of time, and the severity of the incidents that occurred.



If you are a small organisation or club who do not enter many incidents it may seem that this reporting feature is less relevant. However, it is important to remember that over time these incident reports can paint a picture that allows you to understand your incidents better. It helps maintain a long term record keeping institutional knowledge of incidents.

(Adapted from Dignan, 2010).

What's happening in other organisations?

The NID also lets you look at incidents other organisations report. The nature of many school programmes means that a particular EOTC activity only occurs once a year with a small number of students. Given this scenario you would expect few incidents so it is difficult to identify any patterns. You might have an incident that does not seem very significant by itself. A burn caused by spilling hot food or liquids, for example, can easily be attributed to inattention by an individual. It is not until you look at incident data from other organisations that you see your particular incident may not be such an isolated case. This could lead you to re-think how you plan, teach or manage a particular activity.

An example from the 2010 NID report brings together data on burns from 2007–2009 (Cessford, 2010, p. 62–63). Four of the burns cases are related to hot food or liquids. While this is not a high number it indicates that the incident in the example above is not an isolated case. Each of these incidents occurred at the end of the day when students are tired and hungry, and more easily distracted. This is useful information when it comes to reviewing programmes. Some of the questions that these four cases might prompt are about the supervision and instruction when cooking and handling hot food and drinks. It is a reminder that preparing food should be planned as an integral part of the day, not an afterthought.

References

Cessford, G.R., 2009. National Incident Database Report 2007-08. Research Programme, New Zealand Mountain Safety Council, Wellington, New Zealand. Accessed 13/01/11

at www.incidentreport.org.nz/resources/NID_report_2009.pdf

Dignan, A, (2010). National Incident Database Members Update, New Zealand Mountain Safety Council.

Ministry of Education, (2009). *EOTC guidelines: Bringing the curriculum alive*. Learning Media: Wellington.

Leader qualifications

Outdoor Leader

This qualification is offered by EONZ, MSC, and NZOIA. It's designed for teachers and other youth leaders who lead day walks on formed tracks with or without an overnight.

Competencies

The Outdoor Leader Qualification holder has demonstrated competency in:

- Planning overnight outdoor camps and tramps.
- Designing a route card based on a specific map and a specific group of students.
- Reading and interpreting a topographic map.
- Weather, hypothermia, safety around water, and food and nutrition.
- Selecting and managing a campsite: hazard identification and management, managing waste products, and hygiene.
- Selecting appropriate clothing and equipment for the individual and the group, and the packing of a pack for a one-day journey.
- Managing the initial stages of a crisis.
- Managing a group: risk identification and disclosure, team work, pace-setting, controlling the group, and relating the map to reality.
- Caring for the environment.
- Being aware and sensitive to the cultural and special needs of a group.
- Briefing and debriefing a group.
- Motivating a group.
- A first aid certificate.

Requirements

The qualification consists of written tasks, which are done first, and a 24-hour practical, which is usually done during a weekend. Candidates must hold a first aid certificate.

For detailed information, see the EONZ website: www.eonz.org.nz

For more information, contact Fiona McDonald (Outdoor Leader Programme Manager): fmcdonald@clear.net.nz

Other Leader qualifications

Skills Active and the NZ Outdoor Instructors Association (NZOIA) offer Abseiling, Bush Walking, Climbing, Kayaking Leader, and Sea Kayaking qualifications. See www.skillsactive.org.nz and www.nzoia.org.nz

Skills Active and Mountain Bike NZ have a mountain bike leader qualification. See www.skillsactive.org.nz