

NZOIA Quarterly

NEWSLETTER OF THE NEW ZEALAND OUTDOOR INSTRUCTORS ASSOCIATION

Issue 36

March 2006

ASPECTS OF OUTDOOR LEADERSHIP

PART 1

by Ray Hollingsworth

WHAT IS OUTDOOR LEADERSHIP?

I learned to kayak on a course at OPC many moons ago; my first day was spent in the pool, learning the ins and outs of rolling. Surprisingly I nailed that skill pretty quickly and was moderately happy to spend the next morning spinning around in circles on a lake trying to follow my group, and that afternoon bumbling my way down a grade 2 section of the Tongariro River.

Every eddy I cut into I leaned the wrong way and fell over. I would roll up laughing, bulletproof. I hit a few rocks, got pinned a few times and, on a couple of occasions, I couldn't roll because of where I'd ended up in the river - either beside a bank or against a rock - and ended up suffering an unpleasant swim. My bulletproof façade was dented but unbroken.

The next day we were scheduled to paddle a grade 3 section of the Rangateiki River. The instructor invited the better paddlers in the group to do the short grade 4 section above our put-in as a warm-up. Being bulletproof and curious, I asked if I could go too. Nobody said 'No'. Nobody took me aside and said that my skills aren't up to it, that I'd have a really nasty time. They let me go, perhaps figuring my enthusiasm and their skill would get me through.

They were wrong. I had multiple spine-crunching swims in the first few hundred metres; every time I got back in my boat the river seemed to laugh and roar louder. My vision narrowed to a tunnel defined by the nose of the boat and the water surging past it. Hopelessly out of my depth in all meanings of the word, I cascaded down the rapid until the instructor managed to get me to the true right bank and said 'walk'.

Unnerved, psyched-out, the rest of my time kayaking was spent sitting in big eddies, venturing anxiously into the current, paddling with grim determination and no joy. It was a deep end experience that took years to overcome and was a lesson to me in leadership and learning zones.

LEADERSHIP IS AN ART NOT A SCIENCE

What is outdoor leadership? Ask any group of outdoor practitioners and they'll give you as many different answers as there are people in the group. Likewise,

books such as Priest and Gass' "Effective Leadership in Adventure Planning": and Colin Mortlock's "The Adventure Alternative" offer lists of desirable skills and attributes that leaders should have. But commonalities will resonate. Themes will emerge such as technical proficiency across a range of outdoor skills; being well organized; having the ability to synthesize information and make decisions under pressure; having the ability to impart information, knowledge and experiences in a beneficial way; being able to move a group forward positively through an experience...

John Graham, in "Outdoor Leadership" talks about leadership being an art; that it requires more than a book or a course; that it requires time and an ability to build relationships; that it is "...not merely skills and techniques but a subjective blend of personality and style...leadership requires intuition, compassion, common sense and courage."

Graham gives his own definition: "Leadership is the capacity to move others towards goals shared with you, with a focus and competency they would not achieve on their own."

Let's reflect upon the leadership offered in my kayaking baptism. Did the instructor share my goal of me learning to kayak? Yes. Was the instructor focused on that goal? Perhaps, but that focus was probably clouded by the disparate needs of the group - some absolute beginners like me, some grade 3 kayakers eager to be pushed. Did I have the competency to be on that section of river? No.

THEORY COMPLEMENTS PRACTICE

The decision that instructor made that day may have been different if they had had a little theoretical knowledge of how people learn, and the comfort zones that they learn in. Most people's learning styles can be lumped into three boxes: Visual - meaning you need to see something to understand it; Aural - meaning you learn best by hearing information; and Kinesthetic - meaning you learn best by doing. When asked what the grade 4 section was like, the instructor, understandably, described it to me. But it was not until I saw it (visual) and was getting thrashed by it (kinesthetic) that I actually comprehended what he had been saying. Unfortunately I didn't see it until I was in it!

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The NZOIA Quarterly

Issue 36 - March 2006

ISSN 1175-2068

PUBLICATION:

The NZOIA Quarterly is published four times a year by:

New Zealand Outdoor Instructors Association Inc.
PO Box 11090, Manners Street
Wellington 6034, New Zealand.

CONTRIBUTIONS:

The NZOIA Quarterly welcomes articles, letters, news and bits and pieces from all readers. All submissions may be edited. Opinions expressed in the NZOIA Quarterly are those of the writers and may not necessarily reflect those of the NZOIA Executive or the editorial team.

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SUBSCRIPTIONS:

The NZOIA Quarterly is distributed free to members of NZOIA.

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**OUTDOORS
NEW ZEALAND**

Te Whakaminenga
O Nga Mahi Ngahau
O Waho Aotearoa

NOTICES ~ NOTICES ~ NOTICES ~ NOTICES

ONZ Annual Forum and NZOIA AGM

Advance notice is given that this year's forum and AGM will be held in Christchurch on 15-16 September. Full details will be provided nearer the time.

Sea Kayak Awards – some clarification

There is a bit of confusion about the sea kayak awards and assessments so we've changed the assessment calendar to clarify things.

- If you already hold the SKOANZ Guide award you can upgrade to the Sea Kayak 1 instructors award by completing a one day upgrade assessment.
- If you are not a SKOANZ Guide the 4 day Sea Kayak 1 assessment is for you. This includes the 3 day Guides award plus the one day instructor upgrade.

Both these assessment options are now on the calendar.



Executive Report

CHANGES IN THE EXECUTIVE COMMITTEE

Following my resignation as President on commencement of my new position working for the Association, the Executive elected Steve Milgate to act as Chairman until a new President can be elected at this year's AGM. This is in accordance with the Constitution which allows for the appointment of a Chairman in the absence of the President, and seemed like a practical solution that avoids the need to hold a Special General Meeting. Sincerest thanks to Steve for stepping up and taking on this important role.

MEMBER SURVEY

Thanks to everyone who responded to the survey and in particular to those who took time to write additional comments. Mike Boyes who is collating and analysing the results, tells me we received 242 returns from 520 forms sent out. This is an outstanding response and far more than we anticipated. The volume of information is going to take Mike and his team a while to sort through, particularly the comments. This should all be completed so we can provide you with feedback in the next Quarterly.

PROMOTION

The Executive are keen to promote members wherever possible. To this end you will find new advertising material in forthcoming copies of Wilderness magazine. Let us know what you think and especially if any work comes from the advertising.

LIAISON

A great deal of my time and also that of other Executive members is taken up liaising with our funders, allied organisations and government bodies. It's all about maintaining the profile of NZOIA, the status of the award scheme and having input into the management and direction of our sector, as well as specific projects. We're currently: working to progress the Outdoor Leader / Outdoor 1 joint award with EONZ and NZMSC; developing closer relations and cooperation with SFRITO and NZMSC; progressing a variety of initiatives with NZ Mountain Guides; and combining with Water Safety NZ in a joint approach to kayak retailers aiming to improve the quality of guidance and advice that purchasers receive when they buy from non-specialist shops.

REGIONAL VISITS AND MEMBER FORUMS

Later this year I'll be touring the country to visit employers, other organisations and you as members. In each region an informal forum will be held for members to attend. Like the forums we ran a few years ago, the purpose is to give you an opportunity to discuss issues that are important to you, and for me to update you on what is going on in the bigger picture. I'm looking forward to this opportunity to know more of the membership as well as meeting employers to both survey their needs and promote the organisation and its awards. Look out for the schedule in the next Quarterly.

SECTOR UNIFICATION

At the 2005 ONZ Forum clear direction was provided by you and many other members of our sector, that greater unification among the varied outdoor organisations was needed. To this end SPARC funded a meeting of ONZ member organisations at the end of last year. Following on from this the ONZ Board members have made a commitment to support an external review of the outdoor sector with a view to rationalisation and structural change. For our part NZOIA strongly supports this initiative and looks forward to contributing to the review process.

QUALIFICATIONS ALIGNMENT

NZOIA is also represented on this working party which is again coordinated by ONZ and funded by SPARC. Stu Allen has been appointed to research current qualifications in a broad range of disciplines. From this he will produce a map of what currently exists and the various pathways to employment. Following on from this, opportunities for alignment or rationalisation will be identified and recommendations for change will be made. NZOIA is keen to see the unnecessary duplication of qualifications challenged and the complexity of what currently exists both simplified and demystified for the end user.

KAYAK TRAINING

Funding to this end from Water Safety NZ has increased this year and you will all have received a flyer advertising the courses on offer. Places still remain so get onto this quickly if you wish to take advantage of the low prices available to full members. Enrollment is via the website and the schedule is reproduced on the back cover of this newsletter in case you've lost yours.

QUARTERLY

As our primary interface with you as members, the quarterly is an important document. We have received good feedback about the new format of the newsletter and will continue with this. What we require is material from you to lift the value and relevance of what is between the covers! So, send in your letters, articles and opinions; your instructional tips, interesting anecdotes and photographs; technical discussion and updates, new ideas and gear or book reviews; and if you find something interesting that's published elsewhere let us know so we can get hold of it for everyone's benefit.

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... continued from pg 1

Perhaps he could've shown me a video of the run. Perhaps he could've walked me down the river and pointed out the dangers. Whatever, it didn't happen; the result was a negative experience and puts me smack at the top of Colin Mortlock's pyramid, which describes the various Stages of Adventure (see fig 1.)

The base of the pyramid relates to the 'Play' stage, meaning people are doing activities well below their normal abilities, sometimes resulting in boredom. Stage Two is the 'Adventure' stage whereby people learn skills within known limitations, often resulting in feelings of confidence and being in control. In other words, they feel safe to give things a go.

The third stage, according to Mortlock, is that of "Frontier Adventure", where there is a thin line between success and failure. There is uncertainty and stress and this is where skills that were honed in the previous stages are put to the test. This is the stage that people get the most 'buzz' out of, when their perceived skill level turned out to be real enough to allow them to meet the challenge of the activity. For example, the much practiced grade 3 paddler successfully negotiating their first grade 4 rapid.

"Misadventure", the top of the pyramid, is where it all comes crashing down, where the adventure is beyond the person's abilities, where the results will range from dissatisfaction and self-rebuke through to terror, panic and physical or psychological damage. That's where I was at.

THE RECIPE

Outdoor leadership, leading in the outdoors, requires more than technical competence in pursuits and logistics; it involves a seasoned understanding of the environment one is working in, an understanding of the people one is working with, an ability to build positive relationships, and the wherewithal to make the hard decisions.

There is no doubt in my mind that that instructor had the technical abilities required to lead a group kayaking at that level. But if that instructor had had an understanding of Mortlock's pyramid and where people will experience the greatest amount of learning – stages two and three - and how people best learn, perhaps they would have realized exactly what was at stake that day. And further, if they had had the common sense, compassion and courage outlined earlier by Graham, then surely they would have made a different decision. Ray Hollingsworth is a lecturer at Auckland University Technology and holds Rock and Kayak awards. This is the first of a series of articles.

*Ray Hollingsworth holds **Rock 2 and Kayak awards** and is a **Tutor at Auckland University of Technology**.*

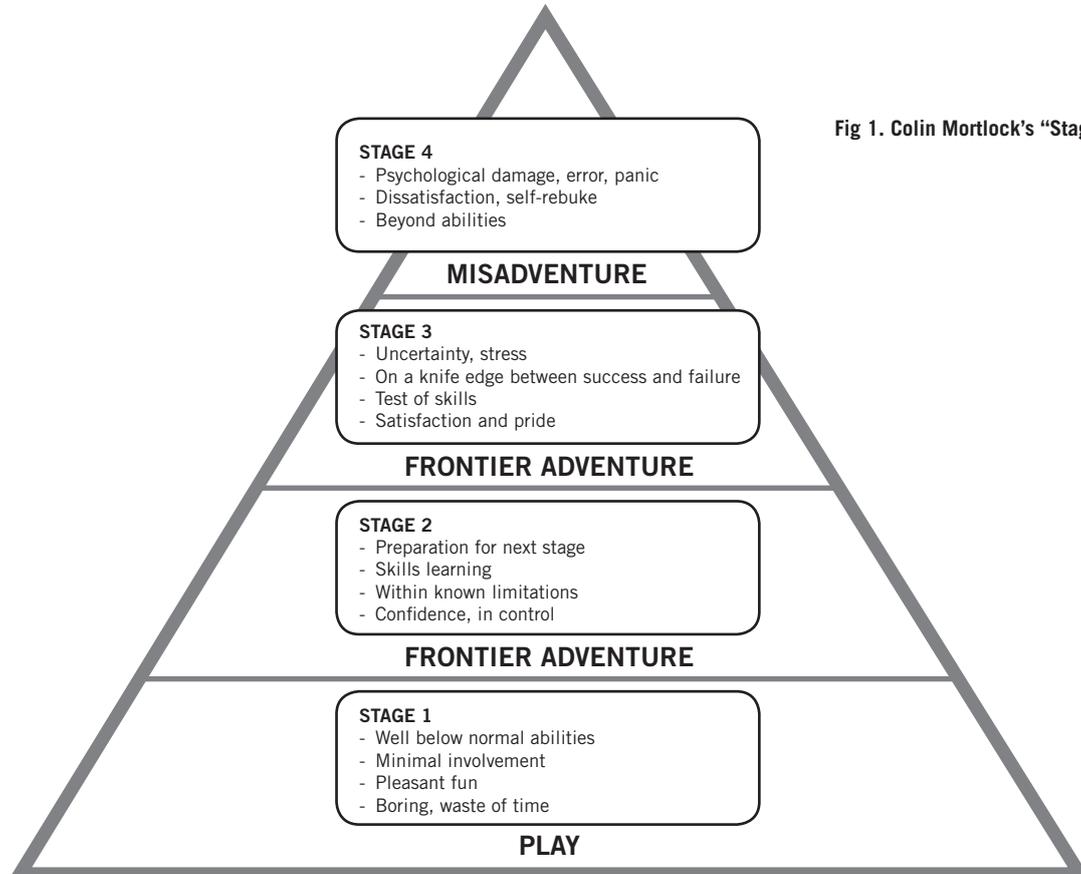


Fig 1. Colin Mortlock's "Stages of Adventure"



Tech Notes >>>

WHEN DO YOU NEED A BACKUP BELAYER?

by Chris Burtenshaw

What's the worst belaying you've ever seen? Does my name come up? I'd like to think not, but one never knows. I was once described as a very "zen" belayer, whatever that is, and I can think of at least one person who wouldn't think much of my belaying, but at least he didn't get hurt, just a little scared.

So how bad a belayer does someone under your care need to be before you team them up with a backup belayer?

Perhaps I'll start by telling you the answer to my own question:

There isn't one student who stands out as the worst; I've had no confidence in the belaying of a few students. It's when the belayer is actually looking like they're doing OK that they can be at their most dangerous. They've maybe just been introduced to leading, they've done a few leads and lead belays, their technique is smooth but I've never seen them hold a fall and I have no confidence that they will keep their hands on the rope when the leader takes an unexpected tumble.

So, when do I think a backup belayer is needed? When is everyone else doing it? What is the best way to do it? And do I have any tricks I use (some salacious muck for critics to get their teeth into and write letters about)? Let's pull this apart and have a look at it:

Here's what I've seen other instructors doing and why I think they do it.

Often a backup belayer is used when a student is learning to belay a top rope with a manual locking belay device. And a backup belayer is usually used until they show their confidence taking in the rope and lowering the climber. This is usually provided by another student. So long as it's well managed and supervised it's all good. Most instructors recognise that when the transition from top rope to leading happens there's a whole new set of hand actions to learn and they usually utilize a backup belayer until they're comfortable with the students belaying. Some times there's a time when a student who's been seen to be competent might need a backup belayer e.g. they've become inattentive or forgotten how to belay and a backup belayer is temporarily assigned. This is all pretty standard these days and is what I'd regard as sound practice.

Perhaps now is a good time to mention an exception to the "normal" practice of using a backup belayer with beginners:

When a Gri Gri is used, a lot of instructors regard this as a fairly fail safe device and have students belaying a top rope without a backup right from the start. Instructors who have employed this technique fairly well have made the following considerations and offered the following briefing:

Students ability to remain attentive and follow instructions "keep pulling the rope through the Gri Gri until the student is at the top", "Call me over when the student is at the top" (instructor then provides a backup belay for the lowering or does the lowering themselves), "Whatever you do, don't touch the black handle unless I'm there"

So, enough of what everyone else is doing. What do I think?

Be conscious. As an instructor this is the single biggest thing that's helped me stay out of A & E.... most of the time. So, I generally do those things that other instructors' do that I've mentioned above. But, the times when your belayer is most prone to the dangers of dropping a student is when they're just gaining experience and along comes a surprise, like someone about to take their first lead fall.....while clipping the next bolt!!! It happens. This is the most stressful time for me as an instructor, when folks are starting to lead belay without backups, or maybe they're learning to lead belay without backup from scratch (something I've done with attentive students who are competent top rope belayers, starting with very easy leads). At this part of the program my eyes are everywhere (some would say they're usually everywhere anyway but we won't go into that) I'm often on the move giving discrete backup belays to one or more belayer at a time. Why discrete? Because at this stage in the students climbing career I think it's important for the student to feel like they're taking responsibility. Perhaps if they get it wrong, then realize I was there and that I had predicted it would happen, it'll be a wake up call for them. One sure-fire way I use for assessing whether a belayer needs a backup is to imagine myself on the other end of their rope in a similarly stressed state to the climber. Would I feel comfortable?

continued...



So what are the ways of providing a safe back up? What's my rationale?

Firstly let's define between 'holding the student down' and 'backup'. Backup is when a second precaution is taken to ensure the belayer won't drop the climber. Holding the student down is just that, it doesn't stop the belayer from dropping the climber. I'd go on to say that a light belayer is better off learning how to deal with their lightness than



being held down by someone. Either they learn to stay on the ball when they're launched or they learn to anchor themselves at the bottom of the cliff. The classic backup that I think works well is having a second student hanging onto the brake end of the rope, who is just as attentive as the belayer should be (this means not engaging in or being engaged in conversation). The backup belayer is positioned at 5 o'clock from the belayer (imagine a bird's eye view of the situation: A clock face is imposed over the belayer, 12 o'clock is directly in front of the belayer, the backup belayer stands at the 5 o'clock position, down by the belayers brake hand) or 7 o'clock if they're left handed. The reason they're here is that if the belayer can't provide an effective brake then the backup belayer is positioned to make use of the belay device's locking abilities. The rope between the belayers brake hand and the backup has a 'reasonable' amount of slack in it (though sometimes it winds up tight, no biggie, usually). Good backup belayers act as a rope manager for the belayer too, removing any tangles or loops from the rope.

On to other trickier things:

I've already mentioned my 'sneaky' incidental backup belaying, that just leaves backup belaying of me: So, I've started climbing with a young guy in Takaka who's ten years old. I can't walk to the top of the cliffs to set climbs up for him, so what do I do? Firstly I choose routes I'm not going to fall off then I give the following briefing: "This is how the rope goes through this metal stuff and it all fit's together like this" (demonstrate) "Now as I go up I'll need you to feed rope out to me, you'll work it out. Got that?" "Try not to let go of this end of the rope, just do your best" (Demonstrate not letting go of the brake end while feeding rope out) "If anything goes wrong, try to remember to hold onto this end of the rope like this (demonstrate). This is the brake position". So, I do the climb, set up a top rope and when I'm ready to be lowered I call out "OK make the rope tight to me and hold it in the brake position. Remember that?" This happens and then what I do is hold onto the rope going down to the belayer, get them to lower me and give myself a backup by holding onto the rope going to them. It's easy to hold my own weight like this and I can easily lower myself down, if needed. After about 3 outings like this, each about 2 hours long this guy can now lower me effectively by himself. I don't know how heavy he is but he is now unfazed by getting pulled off his feet by me (he thinks it's quite fun) so who knows, I might start anchoring him to the ground and I'll start taking some falls.

This style of teaching harks back to the days of apprenticeships and children getting introduced to climbing through parents and friends. I think it has a lot going for it. If you work with groups you could get your students working together to provide a safe belay while you set up the climbs.....Or just go climbing while they master the skill of belaying. Have fun experimenting.

Au revoir, Chris (currently residing in Quebec....It was -30° yesterday!)

Chris Burtenshaw is a Rock 2 award holder, Rock Assessor and former convener of the Technical Sub-Committee.

EDITORS NOTE: Rock 1 candidates are expected to demonstrate instructing safe belay skills including the use of back-up belayers. Group management techniques suitable to the client group and to the use of back-up belayers must also be demonstrated.

OVERVIEW OF SPORT CLIMBING INSTRUCTOR AWARDS

The issue of where instructing sport climbing fits in NZOIA rock syllabi came up at the assessors training and moderation weekend 2005.



Currently there is the Climbing Wall Award. This is for people taking clients top rope climbing on artificial climbing walls, where fixed anchors are easily accessed. There is also a lead endorsement which can be added on as well. So where does teaching sport climbing on natural crags fit in? There seems to be a lot of people with Rock 1 who are instructing sport climbing. The scope of the Rock 1 syllabus currently doesn't cover teaching leading on bolts and in a lot of cases it is unrealistic to think that someone has to get NZOIA Rock 2 to do this.

Below is an outline of the new Sport Climbing Instructors Awards ...

SPORT CLIMBING INSTRUCTORS AWARD

Level 1 (SCI 1)

- Instruct top rope climbing at both artificial and natural crags.
- Where fixed protection is used to create anchors (no placed protection)
- Personal lead climbing to grade 15 in line with NZOIA Rock 1
- 1 day assessment with half day personal skills and half day instructing model students

SPORT CLIMBING INSTRUCTORS AWARD

Level 2 (SCI 2)

- For people who instruct and coach all aspects of sport climbing.
- Single pitch where climbs are no longer than half a rope in length (i.e. 25-30 metres)
- Includes artificial and natural crags where anchors are fixed – bolts and no placed protection on the climb itself or in anchor construction
- Personal climbing up to grade 20 (in-line with Rock 2) on bolts/fixed anchors
- 1 day assessment with half day personal skills and half day instructing model students

Hopefully these awards will encourage those who teach sport climbing – either top roping or lead climbing to gain the most appropriate qualification.

The full syllabi will be on the website soon.

Cheers – Mike Atkinson

Mike Atkinson holds Rock 2 and Alpine 2 awards and is a Rock Assessor.

EDITORS NOTE: These awards will be added to the assessment calendar once the syllabi are completed and will replace the Climbing Wall award. Rock 1 remains the award for those teaching top rope climbing and abseiling where placed protection and anchors are required. Rock 2 remains the award for those instructing lead climbing on placed protection, and all multi-pitch climbing.

SHORT ROPING

By Chris Prudden

Background...

While I am not a member of the Mountain Guides Association I have had many years experience as a guide, and short roping on snow/ ice slopes between 25 and 40 degrees angle has been my bread and butter. I started the first professional guiding company on Mt Taranaki in 1986 continuing to 2002, when I moved to Queenstown and am now a part time guide/instructor with Independent Mountain Guides (Dave 'Spoon' McLeod). Over a 30 year period I made more than 1300 ascents of Mt Taranaki, mostly with clientele in tow and on snow slopes. During this time I never had a guiding accident and none of my clientele was ever injured. My guiding techniques were based on some work as a guide in the European alps but mainly as demonstrated by NZMGA guides from 1980 to today. While based in Taranaki I was only too aware of my professional isolation and I made the effort on many occasions to invite NZMGA guides to Taranaki to instruct and mentor. Also when visiting the Southern Alps I always made the time to actively measure my skills and techniques with those of other guides when the opportunity arose.

BASELINES

A few simple rules were presented to me very early in my career, starting with "keep 'em close and keep 'em tight", this was my base line and it never failed me. There are a few key physical attributes in my favour and I can remember many situations on many surfaces when they obviously came into play. I am 193cms tall and have always weighed above 90kgs as a guide and this puts most situations with a single client physically in my favour. I was always very focused while short roping and made every endeavour to stay directly above the client on the fall line, although this is not always possible. I had very few incidents while engaged in up hill travel, clients were always instructed to follow my steps, even when crampon penetrations were barely visible, I requested them to concentrate and follow my path. That way I knew what was under their feet and if they want to look at the scenery then we would stop. For all travel, up or down, soft snow is your enemy. It is far more physically demanding for the guide to be creating and compacting steps, and even then foot placements for guide and or client are unreliable. Soft snow can suddenly collapse causing loss of balance for guide and client, sharp aggressive reactions are need to neutralize the forces, a strong and heavy guide is generally more effective. I always spent a lot of effort making a good foot platform for the client, it made the journey a lot safer and was still

faster than fixed belaying. Taranaki is famous for its rime ice slopes, just like a tilted ice rink. There is only one way to deal with these conditions, with aggression and focus. It was very common for a mid winters day to be 1000m vertical up and down on a completely frozen surface, slopes 25 to 40 degrees. Pace and focus is paramount, rest is very important so that the client does not lose focus, if you are going to descend the same route, cut rest benches on the way up, so that you can rest the 'screaming quads' on descent. If there is any doubt of your ability to hold the client or the reliability of your own foot work, start running the rope out and pitching. I would often short rope on ascent with two clients up, but take the safer option on descent and pitch them down the steeper areas. A soft layer, particularly new snow, over a hard surface is a difficult condition to manage short roping on a moderately steep slope. In most cases where the snow could cause regular slips for both guide and client, fixed belays and lowering was the preferred choice.

Incidents and successful reactions while short roping snow slopes on descent:

Technique =
If possible,
always above
client on fall
line, rope length
1- 1.5m from
hand loop to
client. Rope
always firm or
tight. Rope arm in down hill position usually bent 50%.
Always assist client by reminding them of 'feet apart' and 'point your toes down hill'



INCIDENT TYPE = 35 deg Rime ice surface, client slipped off, resting on legs, crampons not on surface.
Reaction = Saw the clients poor footwork and anticipated the result, sharp retrieval of rope facing directly down fall -line in strong compressed position, crampons 10 pointing.
Extreme weight ! (with the absence of friction) request the client immediately regain purchase with crampons.

INCIDENT TYPE = 35 deg soft, unstable new snow.
Client loses footing in collapsing snow.
Snow not quite holding my purchase.
Reaction = Use client as a counter balance with rope and lift, therefore assisting in driving my feet down and creating a platform and allowing me to arrest the down-hill movement.

INCIDENT TYPE = 35 deg slope, granular, loose spring snow over a hard old rime layer, client unable to control feet sliding, but still in balance.
 Reaction = Maintain tight rope and strong compressed position, tip toes forward and apply an aggressive shuffle working crampons through the granular snow to the firm gaining control of downhill movement (dynamic arrest)

INCIDENT TYPE = 35 deg slope, hard wind packed 'squeaky' snow, client catches crampon on opposite gaiter pitching forward.
 Reaction = Unexpected, pulled forward of balance point, Immediately 'frog jump' down the fall line retrieving rope sharply and regaining full purchase on slope, boots facing directly down the fall line, 10 pointing, low compressed position pulling client into slope.

ROCK AND OTHER SURFACE TRAVEL

If I am using my hands for my own security or balance I would never short rope on rock. I prefer to do quick short belays where I can easily communicate directly with the client and assist with movement advice. Scree slopes are usually a case of 'confidence roping' because of the mobile surface, but I have used fixed belays when exposed to threatening run outs. Steep vegetated slopes can be very slippery and unpredictable, particularly when there is a lack of hand holds (usually scrub) short roping with out good foot placements (some sort of a trail) is usually impractical. Crampons for personal security have worked well, and with long slopes and threatening run outs a fixed belay is the safest.

SUMMARY

I have found short roping to be a safe and effective technique to provide a dynamic and high level of insurance for clientele on the mountainside. I have always made every effort to gain assistance from the clientele by keeping active and clear communication. I am always quick to change to fixed belays when the situation or conditions underfoot do not 'fit' with my short roping parameters.

*Chris Prudden is an **Alpine 2 award holder***

EDITOR AND TSC NOTE:

The above article on short roping has been contributed by Chris Prudden and is a personal statement by him. This is very much a current and controversial issue, particularly among the mountain guiding community in the light of recent tragic events. Short roping is an element of the Alpine 2 syllabus, though not a major part of the award. This article relates to the extreme end of what an Alpine 2 instructor is qualified to do and is clearly a guiding rather than instructional technique because it is the predominant mode of travel. It is a technique that has been



Above and left:
Guide Instructor (NZOIA) Dave Bolger with clients on Mt Taranaki.

award was accepted by DoC as suitable for commercial guiding operations on Mount Taranaki. The need for a full mountain guides qualification was waived because of the limited glacial terrain. Essentially Chris has been working in a gap that exists between Alpine 2 and the Guides qualification. Both NZOIA and NZMGA are aware of this gap and are discussing ways of better preparing members to work in this terrain. Those who wish to use this technique to the extent that Chris has should, like Chris, undergo further training and gain considerable experience beyond their Alpine 2 award.

NZOIA Alpine 2 is aimed at those instructors working in the limited glaciated areas of the North Island and the non-glaciated mountains of the South Island. At this level, short roping is a term applied to:

- Providing a confidence rope where the student requires assistance or reassurance, but where the consequences of a slip are unlikely to be serious (safe run out).
- Shortening the rope to cross easy ground between pitches or abseils.
- Ridge travel either on opposite sides of a ridge or with placed protection.
- Crossing a short (less than 100m), steep slope above a serious drop (steps normally kicked / cut to aid safe passage)



“Outdoor Instructor required, must have Bush 1, Rock 1, Kayak 1 or equivalent experience...”

Equivalence is a bit of a hot topic for me and is an issue that affects us all to some degree. Despite the fact that we have a well established system of determining competency of outdoor leaders that has been running now for almost 20 years, there are still those who maintain that they are competent yet have never fronted up to be assessed. Within the education system there are many individuals who are responsible for assessing the skills and knowledge of their students, yet have not themselves undergone assessment. This is an issue that arose for me personally before I went through the assessment process. Like many of you, I was allowed to work professionally both overseas and here without qualifications, but saw the need to verify my competence.

Recently the matter of equivalence has been on the table for discussion through development of the new ‘Outdoor Activities - Guidelines for Leaders’ (SPARC 2005); through accident investigations; and because particularly in schools, teachers are being asked to attest to the ability of their outdoor education peers. Let’s have a look at some of the issues this raises:

The recently published ‘Outdoor Activities – Guidelines for Leaders’ states:

“...there is a trend towards outdoor leaders holding qualifications that provide an independent assessment of competence to current, accepted, practice... Organisations should prepare for a future where there are higher expectations of training and qualifications requirements... Sometimes people can demonstrate equivalent knowledge and skills.”

And goes on to define equivalence as:

“An alternative to a qualification which indicates that an outdoor leader meets the requirements listed in the relevant qualification’s syllabus.”

Now I can assure you that there was heated debate around the table when the advisory panel met to write this document. NZOIA is of course quite clear on it’s position, that instructors should either be award holders or be working towards award assessment under the supervision of an award holder. This view is not shared by the whole outdoor community, and there are of course many competent, unqualified leaders. It is worth noting however, that OSH holds a similar position to NZOIA.

In a recent investigation they stated their expectation that where a qualification is available, they expect the instructor to hold it or at least be able to clearly demonstrate that they are working towards it and are receiving training.

The Guidelines go on to explain the responsibility of employers and other bodies:

“Organisations should be able to justify any equivalence decisions they make, including the documentation that has been considered in making their decisions.”

And then lists 10 possible ways by which equivalency might be established:

“Attestation. Referees’ statements. Logged, recent experience comparable to the qualification requirements. Training record. Incident record. Other relevant qualifications. Observation. Field check. Appraisals. A similar overseas qualification.”

Now this is all very well in theory, but not so easy in practice. In fact I would suggest that the only way to establish that someone is at the level of one of our awards is for them to be assessed by us. First of all let’s consider the scope statements for each of our awards. None of these provides for the assessment of aspirant instructors. The only people who are permitted to assess to NZOIA standards are NZOIA assessors, working for NZOIA on one of our assessments. We use two assessors on each assessment and these people are trained, moderated and work within the clearly defined guidelines of the Assessor Manual. This is why we are able to maintain standards and why our awards are so well regarded. In short, if you are not a NZOIA assessor you cannot assess to our standard and, to a degree, only our assessors know what the current standard is.

Lots of award holders are involved in the assessment of clients or students or other instructors as part of their job. This assessment might be of Unit or Achievement Standards or of a local certificate or diploma. In many workplaces assessment of competency takes place before an employee is able to head out and instruct.

Many outdoor providers have well established systems whereby qualified and experienced staff provide training

and establish competency of new staff either in a site specific or generic way. NZOIA fully supports these training pathways as an essential component of gaining experience prior to undertaking an assessment.

So what's the problem? Well, as usual, problems tend to arise when things go wrong. Early on in an accident investigation the question will be asked. "Was the instructor qualified?" If the answer is no, then the next question is likely to be: "Well who authorised them to lead this activity?" All of a sudden some of the focus goes onto the person who established competency or equivalence. Now it may well be that the person was indeed competent and this was not a causal factor in why the accident occurred. However, if they are shown to be less than competent the process by which competency was established will be in the spotlight. No-one wants to be in this position.

There are other things to consider too:

- Why would an award holder who has fronted up for an assessment and paid their subs for years, say that someone else is at the same standard as themselves?
- Does this not undermine the award system?
- Isn't this undervaluing the process and expense the award holder went through in gaining their award?
- Is the unqualified person free-loading? And do they really understand the position they are putting the award holder in?
- Is NZOIA going to back-up the award holder should things go wrong?
- Do the actions of the award holder support NZOIA and are they in line with our Code of Professional Practice?

Most of our level 1 assessments are 3 days long. As an award holder you will recollect that there is much to cover in that short time, and that some parts of the syllabus may not receive full attention because of time constraints. Does it not, therefore, follow that to accurately establish competency is a very time consuming process?

So, if you are asked to verify the competency of an unqualified instructor, no matter how well you think you know them you might like to ask yourself:

1. Am I current in my own skills and in a position to make a valid assessment to a given standard?
2. Do I have the resources, time and experience to accurately assess this person's ability and knowledge?
3. Will my assessment be based on a thorough and well documented system that is supported by my employer, and does this system meet industry endorsed current accepted practice?

4. Am I supporting my own position as a qualified instructor?
5. Am I supporting this person on a pathway to gaining qualifications?
6. Will I be able to justify my assessment and provide a detailed record of how I reached my decision should this person be investigated following an incident?

Signing off someone as being competent is not to be taken lightly. It can have serious implications for the individuals concerned as well as for the industry as a whole and for NZOIA as our professional body. Give it some thought if you find yourself in this position and be prepared to decline if you feel compromised.

The Executive and Technical sub-committee are happy to provide advice if needed. And, if you've got an opinion on this then lets hear from you and we'll put it in the next Quarterly.

Matthew Cant

Organisations should be able to justify any equivalence decisions they make, including the documentation that has been considered in making their decisions.

*Outdoor Activities - Guidelines for Leaders.
SPARC 2005*

CONGRATULATIONS! CONGRATULATIONS!

The following members recently gained NZOIA Awards:

ABSEIL

Christopher Baker
Adam Dickson
Veece Gear
Simon Worsp

ROCK 1

Daniel Childs
Nick Flyvbjerg
Sam Russek
Jo Wilson

BUSH 2

Nicci Mardle
Joanna Parsons
Keith Riley
Heather Tate

FOR SALE

via the NZOIA website: www.nzoia.org.nz

- **NZOIA LOGBOOKS**
Every instructor needs to maintain one - its your professional CV
- **WATERPROOF NOTEBOOKS**
No more soggy notes after that 'wet' day outdoors.
- **NZOIA THERMAL MUGS**
Keep that drink /soup hot for longer.
- **GETTING IT RIGHT**
How to successfully run your outdoor business.
- **NZOIA T-SHIRTS**

Contributions to the NZOIA Quarterly

The NZOIA Quarterly welcomes articles, photos, letters, news, details of coming events and bits and pieces from all readers. Submissions may be edited.

Articles should be submitted in Word format. All photographs must be supplied individually in jpg format and cannot be used if embedded in a Word document.

PLEASE FORWARD ALL ITEMS TO:
Administration Officer, PO Box 11-090, Manners Street,
Wellington 6034, or email to: ao@nzoia.org.nz

LEGAL INFORMATION WEBSITE

Here is a useful link to simple, easy to use legal information for the non-profit sector.

<http://www.nzfvwo.org.nz/keepingitlegal>

AND CHECK OUT THE NZOIA WEB SITE AT

www.nzoia.org.nz

...your comments and suggestions are welcome!

ADVERTISE WITH US ...

HALF PAGE: 170mm wide x 125mm high OR 85mm wide x 245mm high \$100 + gst

QUARTER PAGE: 85mm wide x 125mm high \$70 + gst

Send your advertising copy to:

The Editor NZOIA
PO Box 11-090
Manners Street
Wellington 6034

Email:

ao@nzoia.org.nz

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 KIPPAX – RECIPIENTS OF THE 2005 CMC
 MACPAC NEW ZEALAND MOUNTAINEER
 OF THE YEAR AWARD.

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BOOKING FOR A NZOIA ASSESSMENT

BOOKING ROUTINE

You must have completed the prerequisites before applying for an assessment; check the syllabus - they are all available on the NZOIA website at: www.nzoia.org.nz.

You must also be a current member of NZOIA as at the date of the assessment.

To apply for a place on an assessment, obtain an assessment application form, from the website (or the administration officer) and forward it to NZOIA by the closing date with:

- a \$100 deposit
- a copy of your logbook
- a copy of your current first-aid certificate
- application* form

*APPLICATIONS normally close six weeks before the assessment date.

We allocate places on assessment courses on a first-in, with deposit, first-accepted basis. After the closing date, we will confirm that the assessment will run. You then need pay the balance of the course fee before the assessment. If we cancel the course, we will refund all fees.

The deposit will be refunded in full if you withdraw from a course four weeks or more before the course starts, (or you can transfer to another course). Deposits will not be refunded where the withdrawal is within four weeks of the course, but may be transferred to another course. Where a withdrawal occurs within two weeks of the course 50% of the course fee will be charged.

COURSE FEES:

Two day \$370

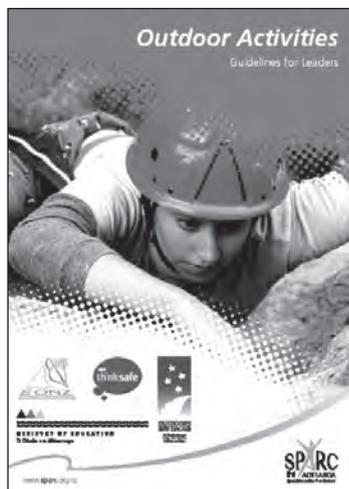
Three day \$495

Four day \$640

ASSESSMENTS BY SPECIAL ARRANGEMENT

It is possible to arrange assessments on dates other than those scheduled (generally subject to the availability of assessors). Please contact either the Assessment Co-ordinator (email - assessment@nzoia.org.nz); or Administration Officer (email - ao@nzoia.org.nz). Telephone 04-385 6048.

Outdoor Activities – Guidelines for Leaders (5th Edition)



This edition replaces the 1996 publication Outdoor Pursuits – Guidelines for Educators (4th edition)

The resource can be ordered from Outdoors New Zealand (ONZ) by downloading an order form from www.sparc.org.nz

- Book \$20 (includes GST and P&P);
- CD \$5 (includes GST and P&P), or
- Download for FREE.

NEW ZEALAND OUTDOOR INSTRUCTORS ASSOCIATION
2006 Assessment Calendar

COURSE DATE			Closing Date **		
Kayak FW					
Auckland	October 28-29	Sep 13			
Christchurch	November 4-5	Sep 20			
Kayak 1					
Christchurch	November 10-12	Sep 25			
Central North Is.	November 17-19	Oct 2			
Multisport Kayak					
Auckland	October 14-15	Aug 30			
Christchurch	October 28-29	Sep 13			
Kayak 2					
Central North Is.	on request				
SKOANZ Guide & Sea Kayak 1					
Christchurch	May 11-14	Mar 31			
Auckland	May 25-28	Apr 14			
Christchurch	May 25-28	Apr 14			
Auckland	October 14-17	Sep 1			
Christchurch	October 14-17	Sep 1			
Sea Kayak 1					
Christchurch	May 14	Mar 31			
Auckland	May 28	Apr 14			
Christchurch	May 28	Apr 14			
Auckland	October 17	Sep 1			
Christchurch	October 17	Sep 1			
Canoe					
South Island	December 2-3	Oct 18			
Cave 1					
Central North Is.	April 21-22	Mar 17			
Cave 2					
	on request				
Rock 1					
Auckland	May 13-14	Mar 29			
Christchurch	May 27-28	Apr 12			
Christchurch	October 28-29	Sep 13			
Dunedin	November 18-19	Oct 3			
Central North Is.	November 25-26	Oct 10			
Auckland	December 2-3	Oct 18			
Christchurch	December 9-10	Oct 30			
Rock 2					
Christchurch	April 7-9	Feb 24			
Bush 1					
South Island	April 8-10	Feb 21			
South Island	October 14-16	Aug 30			
Central North Is.	November 11-13	Sep 27			
South Is.	November 25-27	Oct 9			
Bush 2					
Central North Is.	April 7-9	Feb 20			
South Island	November 24-26	Oct 9			
Alpine 1					
South Is.	September 2-4	Jul 11			
Central North Is.	September 9-11	Jul 24			
South Island	October 7-9	Aug 23			
Alpine 2					
South Island	September 16-18	Jul 31			
Climbing Wall					
	on request				
Abseil 1					
Auckland	December 9-10	Oct 20			

Closing Date ** ~ assessment applications, associated documentation and assessment deposit (\$100) must be received by closing date. Assessment applications received after closing date may be declined.

There are a minimum number of candidates required for each assessment.

PLEASE check the NZOIA website for additional assessments that may have been scheduled since the publication of this Quarterly. The current Assessment Calendar is on the NZOIA website at: http://www.nzoi.org.nz/qualifications/assessment_calendar.asp

Website: www.nzoi.org.nz
 Email: Administration Officer - ao@nzoi.org.nz
 Assessment Co-ordinator - assessment@nzoi.org.nz
 Postal address: PO Box 11-090, Manners Street, Wellington 6034
 Telephone: 04 385 6048 Fax: 04 385 9680

Kayak and Sea Kayak Instructor Training 2006

All courses are open to both NZOIA members and non-members through funding from Water Safety New Zealand.

Sea Kayak Level 1 Training / Refresher

Auckland 25-26 March
Wellington 1-2 April
Nelson 8-9 April

COST: Full Members \$75
Non-members \$150

- This course is designed for those people wishing to prepare for the joint NZOIA / SKOANZ / KASK Sea Kayak 1 assessment.
- It is suitable for those who are already competent sea kayakers with some leadership experience.
- The course focuses on personal skill development, instructional technique, and group and risk management.
- See the award syllabus on our website for further details.

White Water Kayak Level 1 Training / Refresher

Murchison 22 April
Queenstown 22 April

COST: Full Members \$45
Non-members \$90

- Level 1 kayak training is for instructors who are preparing for the NZOIA Kayak 1 assessment.
- For existing Level 1 award holders this course will provide an opportunity to update and refresh your skills.
- See the award syllabus on our website for further details.

White Water Kayak Level 2 Training / Refresher

Murchison 23 April
Queenstown 23 April

COST: Full Members \$45
Non-members \$90

- Level 2 kayak training is for existing Level 1 instructors who are preparing for the NZOIA Kayak 2 assessment.
- For existing Level 2 award holders this course will provide an opportunity to update and refresh your skills.
- See the award syllabus on our website for further details.

Course Application Forms can be downloaded from our website where online payments can also be made. Follow the links from the home page.



NOTE:

We still have places remaining on some of the above courses.

We also have resources available to run more training this year.

If you can get together a group of at least 4 people we will do our best to provide an instructor at the time that suits you, and run a course at the above rates until the funds run out.

THIS OFFER IS AVAILABLE TO ANYONE !