EOTC Guidelines 2016

BRINGING THE CURRICULUM ALIVE

HE WAKA EKE NOA
A CANOE ON WHICH EVERYONE CAN EMBARK

MINISTRY OF EDUCATION
TE TĀHUHU O TE MĀTAURANGA

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INTRODUCTION

WHAKATAUKĪ

Tirohia kia mārama
Whāwhāngia kia rangona te hā.

Observe to gain enlightenment;
participate to feel the essence.

Education outside the classroom

Taking students outside the classroom to learn has been part of schooling in New Zealand for over a century (Lynch, 2006). Education outside the classroom (EOTC) is still a key component of primary and secondary school life in New Zealand (Haddock, 2007a and b).

EOTC is a generic term used to describe curriculum-based learning and teaching that extends the four walls of the classroom. EOTC can range from a museum or marae visit to a sports trip, an outdoor education* camp, a field trip to the rocky shore, or a visit to practise another language. EOTC can take place in the school grounds, in the local community, or in regions further afield, including overseas.

Effective teaching and learning

The links that students are able to make between the classroom and real-world experiences can be critical to their long-term learning (Alton-Lee and Nuthall, 1990). Accordingly, school policies and practices that enable students to participate in well-designed, curriculum-based experiences outside the classroom assist with their learning. Positive EOTC experiences* can also counter educational disadvantage (Robinson et al., 2009).

Learning safely

Learning and safety are paramount in EOTC. While EOTC provides opportunities for positive learning outcomes in a student's education, alongside these gains is the potential for mishap if programmes are not effectively managed.

Schools have legal responsibilities to keep learning environments safe for students and staff. These guidelines clarify schools' responsibilities with regard to EOTC and provide ideas and examples of how schools can safely meet their legal obligations/requirements.

The degree of risk* inherent in many EOTC activities makes effective safety precautions necessary. These guidelines emphasise that the level of risk management (and the level of paperwork) should be in proportion to the level of risk associated with the type of EOTC activity*.

Who are these guidelines for?

These guidelines are for the use of state and state-integrated primary, composite, and secondary schools. Independent schools might also wish to adopt these guidelines. Organisations other than schools may also find them useful.

These guidelines aim to help boards of trustees, principals, and teachers to provide quality educational experiences, outside the classroom, that maximise learning and safety and that meet the relevant statutory requirements and good practice guidelines.

Purpose

The primary purpose of these guidelines is to support teaching and learning of the national curriculum, which includes The New Zealand Curriculum for English-medium Teaching and Learning in Years 1–13 (2007) and Te Marautanga o Aotearoa (2008). The guidelines may also be applied more broadly as a good-practice guide for other activities that schools are associated with. They should* be used to review a school's EOTC policy and procedures and to update them where necessary. The guidelines include a Tool Kit for EOTC Management. It is important to note that not all forms are required for each EOTC activity.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Where these guidelines fit

The EOTC guidelines 2016 Bringing Curriculum Alive (Ministry of Education 2016) update and replace the *EOTC Bringing the Curriculum Alive* (Ministry of Education 2009).

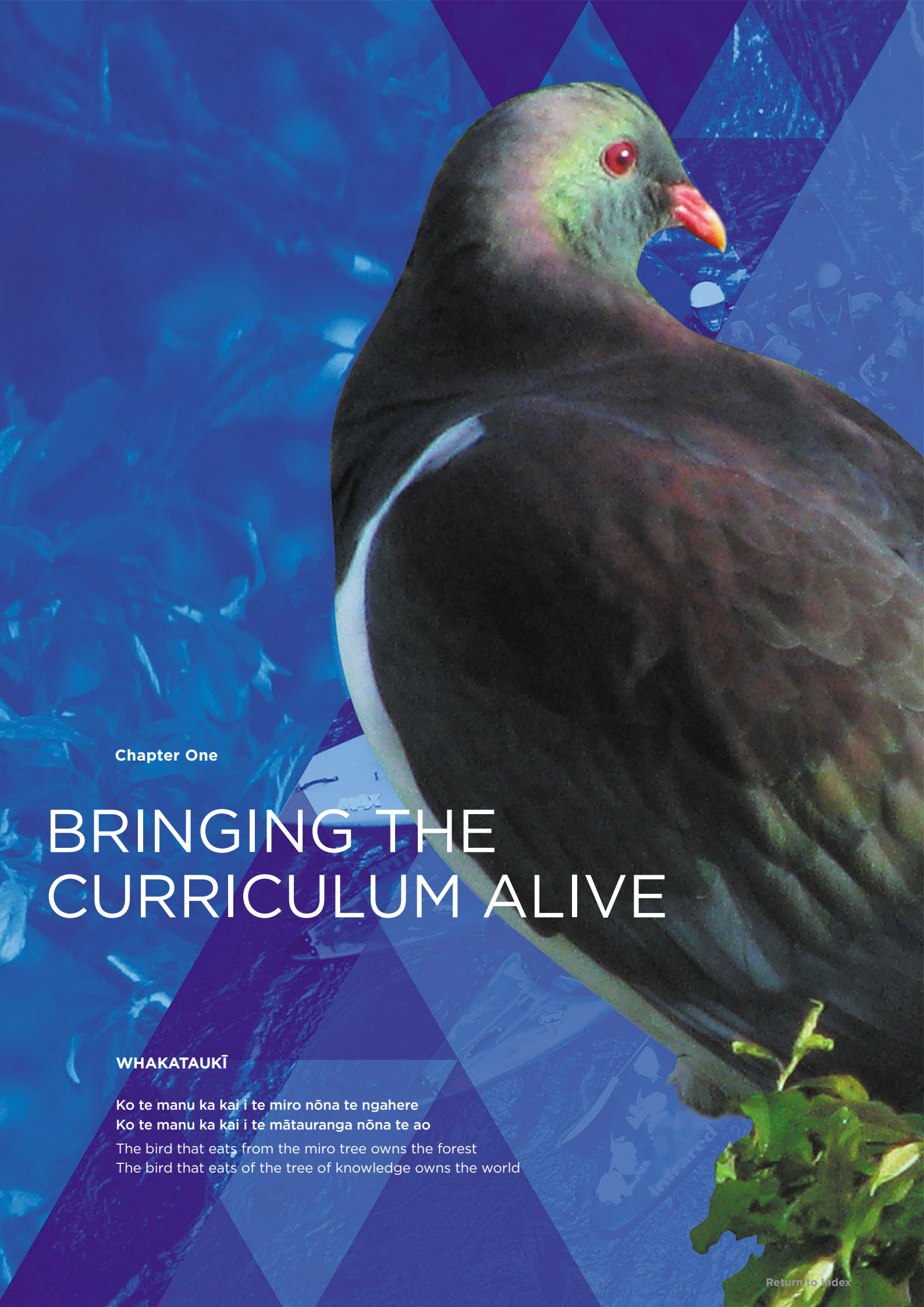
In relation to other Ministry of Education resources, these guidelines:

- support the national curriculum, which includes The New Zealand Curriculum and Te Marautanga o Aotearoa;
- are aligned with Ka Hikitia – Accelerating Success: *the Māori Education Strategy 2013-2017, the Pasifika Education Plan 2013-2017 (2012)*, and *The New Zealand Disability Strategy 2016-2026*;
- supplement *Health and Safety at Work Act 2015 – A practical guide for boards of trustees and school leaders*;
- are a companion to Traumatic Incidents: Managing Student And Staff Wellbeing. *A Guide for School Incident Management Teams (2016)* available at *Traumatic Incident guidelines*
- are a companion to the LEOTC Provider Guide (2008), available at *http://leotc.tki.org.nz/for_providers*;
- are a companion to *Physical Activity for Healthy, Confident Kids (2007)*.

These guidelines are a companion document to the following related resources developed by other agencies.

- *Guidelines for Risk Management in Sport and Recreation* (Sport NZ and ACC, 2010);
- *Outdoor Activities – Guidelines for Leaders* (Sport NZ, 2005);
- *Outdoor Safety – Risk Management for Outdoor Leaders* (New Zealand Mountain Safety Council, 2013);
- Running Secondary School Sport (Sport NZ) *http://www.sportnz.org.nz/managing-sport/guides/running-secondary-school-sport*.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines



Chapter One

BRINGING THE CURRICULUM ALIVE

WHAKATAUKĪ

Ko te manu ka kai i te miro nōna te ngahere
Ko te manu ka kai i te mātauranga nōna te ao

The bird that eats from the miro tree owns the forest
The bird that eats of the tree of knowledge owns the world

Unfactored

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What is EOTC?

1. EOTC is curriculum-based teaching and learning that extends the four walls of the classroom.

Why is it important?

2. It's recognised learning both inside and outside school encourages young people to be capable and knowledgeable citizens, who are involved with the communities they live in. EOTC enables every young person to be able to participate in learning beyond the classroom, whatever their age, ability, or circumstances.

3. Parents of children with additional support needs have provided feedback to the Ministry of Education that their children are too often excluded from EOTC programmes. While the parents acknowledge that participation of children in EOTC programmes may be challenging, it is important that their children are not excluded from participation. Many schools are meeting this challenge and through careful problem solving are able to make reasonable adaptations and accommodations to include all children in EOTC programmes. Human Rights legislation, the New Zealand Disability strategy and "inclusive education" all reinforce the involvement of all children in all aspects of the school curriculum.

Within the EOTC context, it is important to understand that EOTC is for all children.

4. Learning outside the classroom has the potential to support learning in ways that are consistent with the vision, graduate profile, principles, values, attitudes, key competencies, and effective pedagogy statements in the national curriculum (The New Zealand Curriculum and Te Marautanga o Aotearoa).

5. In addition, EOTC can support the aspiration for broad and deep learning in real-life contexts within and across the learning areas of the national curriculum.

Learning can take place anywhere

The school grounds

6. The school buildings and grounds are a rich resource on the doorstep, offering opportunities for formal and informal learning and play.

For example, students can:

- study spiders on the school fence;
- grow vegetables or native plants;
- play sports on the fields or courts;
- learn about energy use and waste.

The local environment and community

7. Learners can develop the skills and confidence to explore their local community, which may be within walking distance of the school or accessible by car, local bus, or train ride.

8. Exploring landscapes and streetscapes, scientific reserves, heritage sites including sites of significance to local iwi, sports and recreation facilities, places of worship, and theatres, attending live music events, and involvement in volunteer and citizenship projects can enrich all areas of the curriculum.

> "You can talk about something, plan for something, and show them photos, but nothing beats the real deal."
>
> **Teacher**

Places further afield

9. As young people mature, they gain confidence and appreciate more distant and challenging environments that stimulate their curiosity and imagination. For example, students can explore:

- rural or urban environments that contrast with their own environment and possibly involve an overnight stay;
- bush and water environments within a few hours from a road end or accessible by vehicle;
- theatre workshops, places of worship, farms and gardens, museums and galleries, and places that reflect the world of commerce, science and technology.

Residential experiences

10. Staying away from home for a few nights or more is a powerful way of developing key life skills and provides opportunities for learners and teachers to strengthen their relationships. Learners can stay at residential camps, outdoor education* centres or marae; they can be billeted by another school community; they can take part in cultural and arts festivals; they can go on an outdoor journey, sports trip, or geography or biology field trip; or they may travel overseas for a cultural, classics, or language learning experience. Such experiences contribute to deepening students' awareness of the key competencies, principles, and values while bringing the learning areas alive in real-life contexts over an extended period of time.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Curriculum vision

The vision of New Zealand's national curriculum cannot be achieved inside classrooms alone.

11. The New Zealand Curriculum and Te Marautanga o Aotearoa both emphasise a vision for learners in Aotearoa New Zealand that has implications for the design of learning experiences beyond the walls of the classroom. If students are to be confident in their own identities, learning should occur in places where that sense of identity is strong and can be developed – and those places are not limited to the classroom or school. If students are to be connected to the land and environment, they need opportunities to engage in learning beyond the classroom walls.

12. If students are to be actively involved participants in a range of life contexts and contributors to the well-being of New Zealand (social, cultural, economic, and environmental), they need opportunities to actively participate in those contexts during their schooling. Schools are not preparing students to be actively involved later or when they are grown up – students are capable of participating actively in a range of contexts, including those beyond the school, now. This is one of the pathways to becoming lifelong learners.

13. The remainder of this chapter illustrates how EOTC can give effect to the national curriculum. Paragraphs 14-37 focus on The New Zealand Curriculum for English-medium schools. Paragraphs 38-55 focus on Te Marautanga o Aotearoa for Māori-medium schools.

EOTC and the New Zealand Curriculum

EOTC and the principles of The New Zealand Curriculum

14. The principles of The New Zealand Curriculum can be embedded in the design and implementation of each school's own curriculum involving learning experiences outside the classroom. Many of the people and places that can strengthen students' understanding of and commitment to the Treaty of Waitangi are beyond our schools and classrooms, as are many of the sources of knowledge of te reo Māori me ōna tikanga. Through learning outside the classroom, we can reflect New Zealand's cultural diversity, and the places we take students to can signal the value of diverse histories and traditions. The interactions that take place while students are involved in learning outside the classroom are rich opportunities for implementing an inclusive curriculum that is non-sexist, non-racist, and non-discriminatory and inclusive of all student disabilities. The places we take students to, and the roles we engage them in while "outside", can recognise and affirm all students' identities, languages, cultures, abilities, talents, and learning needs. The principle of community engagement has special implications for EOTC. Where better to connect with students' wider lives and develop partnerships with families, whānau, and communities than in the community?

15. Similarly, the principle of coherence is fundamental to learning outside the classroom because any "beyond school" experience inevitably crosses learning areas and can potentially support transitions and pathways to further learning. The national curriculum emphasises the importance of dealing with future-focused issues, such as sustainability, citizenship, enterprise, and globalisation.

16. Moving beyond the classroom, students are able to directly engage with key authentic resources that relate to those issues, including people, organisations, and places. Learning beyond the classroom also enables students to reflect on and gain insights into their learning processes so that they are learning to learn. Learning sites outside the classroom provide opportunities for high expectations to be realised. All students, regardless of their individual circumstances, can learn and can achieve personal excellence in the context of EOTC experiences*

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

EOTC and the values in the New Zealand Curriculum

17. EOTC provides opportunities to develop the following NZC values:

- excellence, aiming high and by persevering in the face of difficulties;
- innovation, inquiry, and curiosity by thinking critically, creatively, and reflectively;
- diversity, as found in our different cultures, languages, and heritages;
- equity, through fairness and social justice;
- community and participation for the common good;
- ecological sustainability and care for the environment;
- integrity, which involves being honest, responsible, and accountable and acting ethically;
- respect (for) themselves, others, and human rights.

> "The key competencies sit naturally within most aspects of EOTC programmes."
>
> **Principal**

18. EOTC can enable students to:

- encounter the values of diverse groups and cultures as they occur in real-world contexts;
- experience values being demonstrated by others in authentic ways;
- strengthen their understanding of what values are;
- understand or explain how values influence their own interactions with people and places beyond school;
- consider a range of types of values (cultural, moral, social, aesthetic, and economic);
- have a basis for learning the skills needed for inquiring into values – exploring, empathising, critically analysing, and discussing.

EOTC – the key competencies and the learning areas

19. The New Zealand Curriculum identifies five key competencies: thinking; managing self; using language, symbols, and texts; relating to others; and participating and contributing.

20. Settings beyond the classroom are rich sites for developing, practising, and demonstrating the key competencies in a range of contexts within and across learning areas.

- Authentic contexts are essential for developing the key competencies. Since it is important for students to develop and demonstrate their capabilities, where better than in authentic contexts beyond the classroom?
- Students need to apply the key competencies and use them to transform learning. They are a means of transforming the way in which students engage with and use their knowledge and understandings. Where better to apply and transform new learning than in relevant, authentic contexts beyond the classroom?
- Students need to develop the disposition to use the key competencies. Attitudes are important as well as knowledge, skills, and values. Learning beyond the classroom prompts students to demonstrate that they are ready, willing, and able to use the new competencies that they are developing.
- The future-focused aspect of the key competencies can be reinforced through EOTC, through experiences in which students encounter future issues that are a current concern in contexts beyond school. Refer to *TKI Key Competencies* for more information about these aspects of the key competencies.

Teaching as inquiry and EOTC

21. Teaching as inquiry (The New Zealand Curriculum, page 35) is about the thinking that teachers do as they consider what is most important, given:

- their students' learning needs and aspirations (focusing inquiry);
- the teaching approaches they intend to use (teaching inquiry);
- the impact previous teaching has had on their students' learning (learning inquiry).

22. These considerations are important for all teaching and learning but are critical in EOTC because teachers need to inquire into both learning needs and safety needs.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Focusing inquiry

23. What matters most?

- What are our students' learning needs? What do they need to learn and do?
- What kinds of learning experiences will help them to learn?
- Will this learning include learning beyond the classroom?
- What previous EOTC experiences* have our students had? How can we build on what they already know and can do?
- What, therefore, is most important for them to experience and learn outside the classroom walls?

For each student, consider their:

- age;
- experiences;
- stage of developmental readiness;
- level of capability;
- level of confidence;
- skills;
- limits;
- needs.

Teaching inquiry

24. What is the best way to teach and learn?

- What is the most appropriate learning environment for my students' learning needs?
- What EOTC activities are appropriate for the developmental needs of my students?
- What approaches have others (both teachers and researchers) found to be effective?

25. Teachers should carefully design learning experiences, including EOTC experiences, by using effective pedagogy. Evidence shows that students learn best when their teachers:

- make connections to prior learning and experience;
- create a supportive learning environment;
- facilitate shared learning;
- enhance the relevance of new learning;
- provide opportunities for students to set goals and identify personal anxieties and challenges;
- provide sufficient opportunities to learn and encourage reflective thought and action. The opportunities should* be carefully aligned and sequenced. Progression of learning has particular importance in the context of EOTC (see paragraphs 30-35).

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Supportive and inclusive relationship

Create a supportive learning environment

26. EOTC provides an ideal context to develop supportive relationships between members of a learning community, through learning in real social and cultural contexts that are inclusive of all learners. The need for a supportive learning community is important at all times and in all contexts but is particularly critical when students move beyond the classroom and school. Relationships can also be built with members of the wider school or local community and beyond.

Shared experience

Facilitate shared learning

27. The experiences students have together beyond the classroom are important not only because of the learning that occurs for each of the individuals involved but also for the shared experience that teachers can draw on afterwards. The shared experience becomes a platform for subsequent activities and tasks. EOTC can also help to develop partnerships in which learning is seen as a reciprocal activity (ako), involving students, teachers, family members, and others in the wider community. EOTC experiences* confirm that many people are learners within this community and that not only teachers have expertise to offer.

Relevance

Enhance the relevance of new learning

28. When students engage in learning opportunities beyond the classroom, they relate their learning to real contexts in the wider world. In familiar and unfamiliar EOTC contexts, students' curiosity can be stimulated, promoting opportunities for further learning. Contexts beyond the classroom are also rich places to learn because they are not typically confined to any one learning area. Rather, EOTC provides contexts where connections can be made across curriculum learning areas, to students' lives and prior experiences, and with the wider world. A variety of people and places beyond school are sources of information and ideas and provide opportunities for students to apply their learning in authentic ways.

Authenticity

Provide sufficient opportunities to learn

29. Learning is enhanced when students encounter a variety of new experiences. Providing multiple opportunities for learning with people and places beyond the classroom helps students to engage with and remember the learning.

Progression: For learning and safety

30. The foundations for safety are laid when the progression of learning tasks, activities, and events is carefully designed to gradually increase complexity in relation to students' capabilities. Progression is important in a school's EOTC programme*, both across activities and within each EOTC event* or activity*. A well-sequenced EOTC programme can ensure that students and assistants do not find themselves out of their depth but that they have the knowledge, skills, and attitudes to cope in the EOTC environment.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Provide sufficient opportunities to learn

Aligning experiences to students' existing capabilities

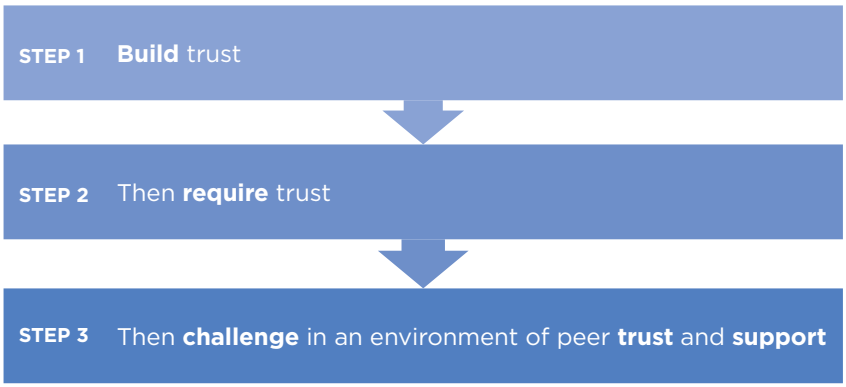
31. Learning and safety are enhanced when careful consideration is given to alignment between students' existing capabilities and the design of the learning experience.

Progressive sequences

32. Careful consideration should* also be given to the sequence of tasks, activities, and events that students experience in EOTC to ensure that a sequence involves an appropriate progression that scaffolds learning.

i. Progression within an EOTC activity

33. Sequencing a specific EOTC activity enables students to build confidence and skills together. This can make learning fun while giving students the ability to keep themselves safe.



ii. Progression across activities within an EOTC event

34. Planning the progression in any sequence of activities is also important during EOTC events (such as camps). It is important to make sure learning is planned and purposeful rather than just a smorgasbord of rostered activities. Well-sequenced learning activities are safer for students and build their confidence in ways that enable them to exceed their previously perceived limits.

- Does the roster of activities ensure that all groups of students experience only activities within their limits early in the event?
- Are the activities early in the event likely to build, rather than damage, students' confidence?
- Is there continuity in terms of the people teaching or instructing? Using the same person across activities enables that person to facilitate progressive group and individual development.
- Is the EOTC co-ordinator, Person in Charge, or activity leader involved in the planning, running, and evaluation of the EOTC experience*? If so, this will increase the potential for meeting educational and safety outcomes.
- Is the sequence of activities designed to build confidence and skills over the duration of the event? For example, a sequence of activities might begin with an activity to develop a foundation skill, like building trust, then progress to activities that require trust, and then to those that require it in a more challenging context.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Provide sufficient opportunities to learn

iii. Sequencing across learning programmes that include EOTC experiences*

35. Ask yourself these questions:

- Do EOTC experiences at each level build on the knowledge, key competencies, skills, and attitudes developed in previous year/s, including those developed at other schools?
- Do EOTC experiences early in the year form a foundation for learning over the rest of the year?
- Do EOTC experiences at the end of the year build on and extend the knowledge, key competencies, skills, and attitudes gained throughout the year?

Example 1
Learning area: health and physical education/ outdoor education*

"The teachers aren't feeding knowledge into you – you're doing it more for yourself."

Year 8 student

TASK 1 **Learn** how to get in and out of a kayak on dry land.

TASK 2 **Practise** wet exits with a buddy in a swimming pool.

TASK 3 **Learn and practise** various paddle strokes on flat water.

TASK 4 **Venture** onto Grade 1 moving water.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

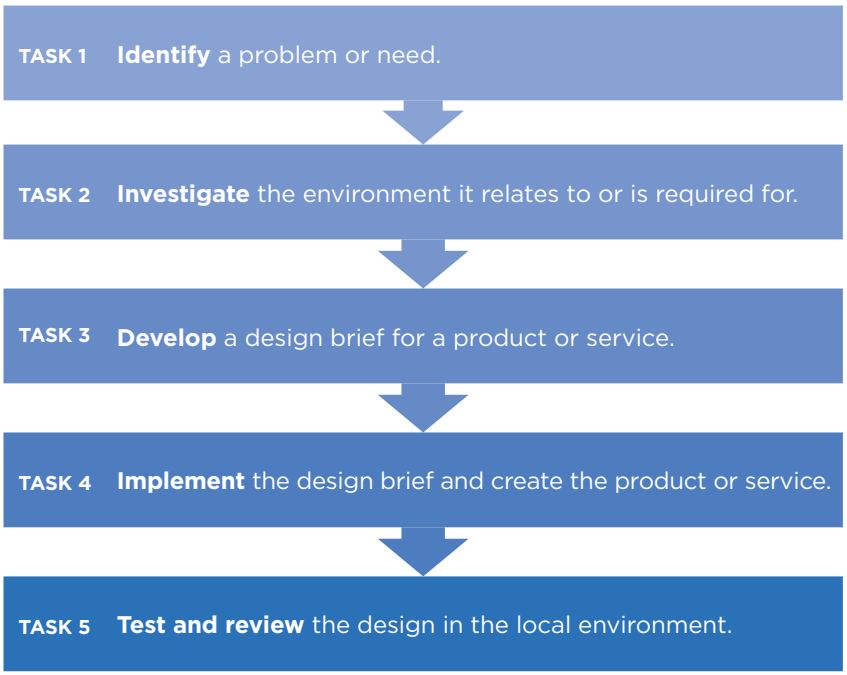
Provide sufficient opportunities to learn

"At first I didn't think I'd be able to finish the walk, but we worked hard to make sure we were well-prepared and fit."

Year 6 student

Example 2
Learning area: technology

36. If observation during the EOTC experience suggests that the planned learning progression is not appropriate for a group, the activity leader must take action. By exercising good judgement and altering the planned sequence to meet students' needs, the activity leader facilitates learning without compromising safety.



Learning inquiry

37. What happened for the students?

The third inquiry in the Teaching as Inquiry model involves using a range of assessment approaches to consider the impact of the EOTC experiences and find out how far each experience has promoted student learning and well-being.

- What impact did the teaching have? How successful were the students in achieving the prioritised outcomes while learning outside the classroom?
- What do we know now about changes to the students' capabilities?
- Which teaching approaches were most evident in the teaching and learning, and how did that impact on the outcomes for the students?
- Which approaches, on reflection, should have been emphasised more? How could the teaching approaches be changed or improved?
- Given the students' achievement, what are the next steps for teaching and learning? What, if any, EOTC activities* and events* could be part of the programme*?

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Te Akoranga Taiao me Te Marautanga o Aotearoa

Ko te Oranga Taiao, He Oranga Tangata

38. Ko te akoranga ki waho i te akomanga he whakaakoranga matua ki ngā tauira e haere ana ki te kura Māori. Ehara te akoranga taiao i te mea hou ki tā te iwi Māori. Ko te mahi māra, te mahi hī ika, te mahi whakairo, te mahi raranga, te mahi hākinakina, te mahi whakauka whenua hoki ētahi momo akoranga ki te taiao nō te ao kohatu o ngā mātua tūpuna. Ka noho ngātahi te akoranga i te akomanga ki roto ki te akoranga taiao.

Ko Te Marautanga o Aotearoa

39. Ko te tāhū o *Te Marautanga o Aotearoa i* whakaūkia i runga i ngā wawata kia tū tangata te ākonga, kia tupu hei ākonga mātau, hei ākonga pakari, hei ākonga whakawhiti kōrero i roto i te ao Māori, e whai oranga ai tōna hinengaro, tōna tinana, tōna wairua, me tōna pūmau hoki ki tōna tuakiri, ki tōna tūrangawaewae. Kei a ia ngā pūkenga, ngā mōhiotanga hoki e whai wāhi atu ai ia ki te hāpai i te iwi Māori me te ao whānui.

40. Kua whārikihia te akoranga taiao i *Ngā Mātāpono Whānui o Te Marautanga* arā:

- Ko te ākonga te pūtake o te ako
- Kia pūmau te ākonga ki a ia anō
- Kia eke te ākonga tōna taumata
- Me mahi tahi te kura, te whānau, te hapū, te iwi me te hapori
- Ko te oranga taiao, he oranga tangata.

41. E ai ki te mātāpono *Ko te oranga taiao, he oranga tangata*, ka whakamana te Marautanga i te urunga atu a te kura, te whānau, te hapori, te hapū, me te iwi e arotahi ana ki te tū a te tamaiti, ki roto i tōna ake ao. Nō reira, ka pūmau te marautanga ā-kura:

- Kia toitū te taiao;
- Ki te whakawhanake i ngā huarahi ako e whai take a te tū a te tamaiti ki te taiao;
- Ki te whakarite kaupapa hei honohono i ngā wāhanga ako;
- Ki te whakamana i te mahi a te tipuranga ki tōna ake ao.

He Rauemi Awhina

42. Kei te *kete āwhina* ngā puka pūnaha haumaru. He tohutohu ēnei mo ngā kaiako whakahaere o te ngohe akoranga taiao rātou ko te tumuaki, te poari whakahaere, te kairuruku, ngā mātua, ngā ākonga, ngā tūao, ngā kaiwhakarato-ā-waho hoki. Kua takoto ēnei puka hei āwhina i ngā kura ki te whakatakoto i a rātou ake pūnaha, kia whakatutuki hoki i ō rātou kawenga i raro i tēnā ture, i tēnā ture.

- He tohutohu noa ngā puka, ā, he pai te whakarerekē kia hāngai pūmau ki tōu ake kura
- Ki te whakarerekē i ēnei puka, kia maumahara me hangai ki ngā ture haumaru
- He pai te tārua i ngā puka nei.

43. **Hei tauira:** He tauira noa tēnei i Te Kura Mana Māori o Whangaparāoa. Kāore e kore, kei ia kura ā rātou ake kōrero hei tauira.

Nā Te Kura Mana Māori o Whangaparāoa (Whangaparāoa)

44. Ko te haerenga mai o ngā manuhiri a Te Whare Wānanga o Hawai'i i Hilo (ngā mātua, ngā kaumatua, ngā kaiako, ngā kaiāwhina, ngā tauira hoki) tētahi tauira akoranga taiao. He mea hou te manaaki iwi taketake nō Hawai'i ki tā te kura o Whangaparāoa.

45. Ka tū tētahi pōwhiri, whai muri i tērā e haere ana ngā mihi. Ko ngā tamariki e mihi ki te manuhiri, katahi ka waiata hei kinaki mo tō rātou waiata. I uruuru atu anō hoki ngā tamariki ki te karakia Ringatū i whakahaeretia e te minita.

Akoranga Taiao

46. I mua i te haerenga ki tātahi, ka aratakina te karakia e tētahi o ngā kaumātua. Nāna i tuku whakamoemiti, i tuku inoi kia whakawātea te huarahi, kia manaakitia te rōpū kia kaua e pā atu te āhuatanga kino.

"Ko te mea pai ki ahau ka puta te hari i ngā mahuhiri ki te hīkoi ki te ākau"

He ākonga o te kura tuatahi.

47. I a mātou ko ngā tamariki me ngā manuhiri e haere ana ki te taiao i puta kōrero i ngā tamariki o Whangaparāoa mo ngā wāhi tūpatotanga, ngā wāhi noho tapu, ngā wāhi hei manaaki whenua o tō mātou taiao. He mea mīharo ki te hunga Hilo kia rongo i ngā tamariki o Whangaparāoa e mau tonutia ngā tikanga me ngā kōrero tuku iho.

48. I a mātou e hīkoi ana i raro i te maunga kūrae rongonui o Whangaparāoa ko Tihirau, ka kitea te pīngao e tipu ake ana. Ko te whakamārama a ngā tamariki, ko te pīngao hei ārai atu i te ngahae o te moana. E ai ki ngā pakeke, hei te rewanga rawa ake o te whetū ko Autahi, i te pae moana, ko tērā te wā e āhei ai te tangata te hī moki. He tikanga tuku iho o Kauaetangohia e mau tonutia ki ēnei rā.

49. Nā te ngaru o te moana me tōna karekare mai, ka whakamārama mai te tumuaki o te kura i ngā kōrero o te taunga mai o ngā waka o Te Hekenga Nui o te Māori mai i ngā motu o Te Moana-nui-a-Kiwa. Ā, ka puta te take i tapaina te hapū o Whangaparāoa me tō rātou whare tūpuna ki te ingoa ko Kauaetangohia. Mutu ana, haere ake ana te rōpū ki te toka whakamaumahara ki te ūnga mai o ngā waka. Nā te tumuaki hoki te hītori o te kōhatu whakamaumahara i whakamārama, arā Te Haika o Tainui.

50. Katahi ka haere tā mātou ope ki te wāhi hopu tuna, ā, nā te kuia i kōrero mō āna hopu tuna i a ia e tamariki ana. Ka hīkoi haere tonu, ā, ka haere ngā kōrero o ngā kōwhaiwhai o te marae. Mutu ana ka ākona te hunga Hawai'i ki te waiata mō te moki. Kātahi ka whakaakona ngā tamariki ki te hula e te hunga Hawai'i, arā, te waiata-ā-ringa a Ngoi Pewhairangi ko "whakarongo ki te reo Māori".

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

"He iwi kē rātou, he reo kē tō rātou ahakoa i taea e mātou ki te whakarongo ki tō rātou"

He ākonga o te kura tuatahi

51. I te hokinga atu ki te kura, ka pōwhiritia te iwi o Hawai'i ki te hakari, nā te mea ko tēnei tō rātou pō whakamutunga. Ka horahia ngā tēpu ki ngā kai Māori o Kauaetangohia, otirā, o Te Whānau-ā-Apanui. Puhake ana te kai reka, arā, te kōura, te pāua, te poaka puihi, te tuna, te pūpū, te kānga kōpiro me te aha noa atu o ngā kai Māori.

52. I te mutunga o te hākari, tūtū mai ngā tāngata o Hawai'i ki te mihi i te reo taketake o Hawai'i me te reo Pākehā hoki. I puta ngā kupu whakanui mō te manaakitanga i horaina mai e Kauaetangohia me te miharo a ngā tamariki e pūmau tonu ana te reo me ōnā tikanga Māori, ā, e kore e wareware i a rātou te pai o ngā tamariki e tino mōhio ana ki ngā āhuatanga huhua o tō rātou taiao. I te mutunga o ia whaikōrero, ka hula rātou – te mutunga kē mai o te pai! Mutu ana ka whakatakoto koha mō te kura. Ka whakahokia te mihi e te kura o Whangaparāoa, te mihi anō hoki ki te mahi whakaora i te reo taketake o Hawai'i. Otirā, kua whakapakari anō te hononga ā-reo, ā-iwi hoki i waenga i te Māori me te iwi o Hawai'i.

53. I te ata, nā ngā tamariki i tuku taonga. Katahi ka tuku whakmoemiti kia pai te takatū o te hunga o Hawai'i i Aotearoa.

Te Marautanga o Aotearoa me te Akoranga Taiao

54. I tauiratia mai e ngā tamariki o Te Kura Mana Māori o Whangaparāoa ngā mātāpono o Te Marautanga o Aotearoa i roto i te manaaki manuhiri me tā rātou mōhiotanga ki tō rātou ake taiao e whakaahua i te reo o ngā matua tīpuna. Tēna rā koutou, ngā mokopuna o Kauaetangohia. He rangatira tō iwi i a koutou.

"Ko ōku whakaaro he tino pai...ko au tētahi i manaaki, i hīkoi, i kai tahi i te taha o tēnei manuhiri. He tāngata pai, he tāngata humārie, he tāngata pīrangi ki te kōrero ki a mātou"

He ākonga o te kura tuatahi

55. Ko te reo Māori te reo o te tangata whenua o Aotearoa. He taonga i roto i te Tiriti o Waitangi, ā, he reo whai mana i raro i ngā ture o Aotearoa. Otirā, koia nei te whainga a Te Kura Mana Māori o Whangaparāoa, arā, kia matatau anō hoki ā mātou tamariki ki te reo Māori me ngā mahi a ō rātou tīpuna, ahakoa i te kāinga, i te kura, i te taiao rānei.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Chapter Two

LEARNING SAFELY A SHARED RESPONSIBILITY

WHAKATAUKĪ

Ko Tangaroa ara rau

Tangaroa of the many pathways of the sea

Everyone must be alert, know their roles,
and also be willing and able to assist others.

Return to Index

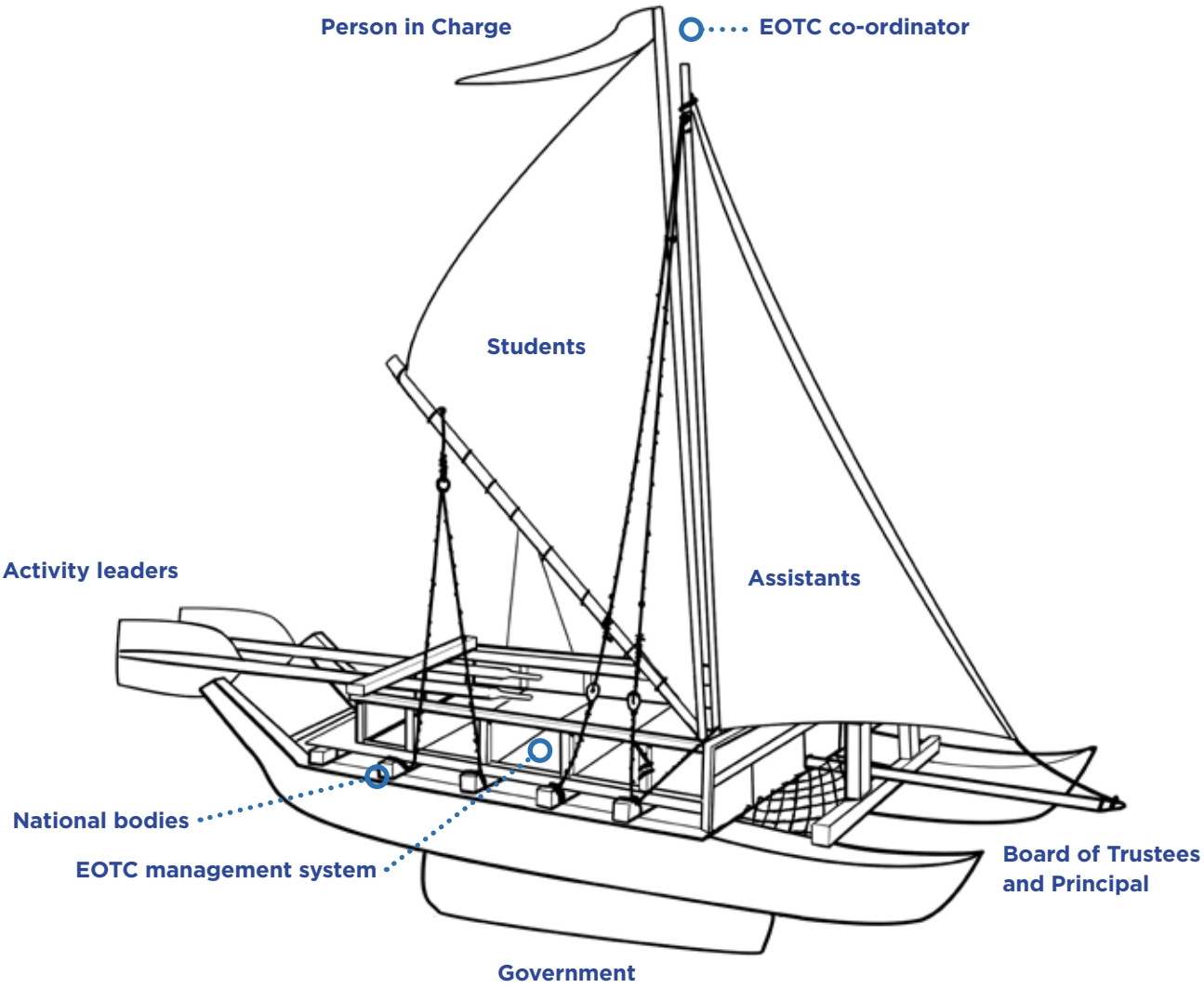
Shared responsibility

56. While the board of trustees is responsible for the health and safety of all participants in EOTC, and for ensuring that learning outcomes are met, the board can only achieve this with the help of everyone involved. This includes effective delegation of responsibilities to relevant people.

The following waka analogy depicts the shared responsibility of all the people or groups involved.

Figure 2.1
The Waka of Learning ... Safely

Adapted from Periam (2002)



Waka analogy

57. As when sailing a double-hulled waka, everyone needs to work together to achieve effective learning experiences outside the classroom. While all of the groups involved in EOTC are in control of different aspects, they have a shared, not sole, responsibility for the quality of the learning and safety outcomes.

58. Figure 2.1 above shows how the waka is directed, steered, propelled, stabilised, and supported by different groups of people.

59. The students are the rā matua – the mainsail. Their learning drives the experience. Learning in an authentic context brings the curriculum alive for students – it puts wind in their sails. Involving students in the planning and organising of EOTC activities*, including taking genuine responsibility for implementing safe practices, impacts significantly on their learning outcomes and the safety of the activity.

60. The Person in Charge is the mata ariki – the wind indicator. Situated up high, the Person in Charge has an overview of the activity, with overall responsibility for the students, activity leaders, and assistants involved at all times. They have a handle on the overall programme and can see where the group has come from and where it is going to next.

They ensure that all relevant information about responsibilities and obligations is clearly communicated to students and teachers, activity leaders, assistants and volunteers.

61. The activity leaders are the hoe urungi and hoe ākau – the dual steering paddles. The activity leaders work with the Person in Charge to steer the desired course, respond appropriately to changing weather and sea conditions, and navigate around obstacles. They ensure students' needs and learning outcomes are met, and they maintain safety during the EOTC experience*. Their judgement, based on skills and experience, is critical for the safety of all. Therefore, it is imperative that the activity leaders are competent to do the job.

62. The assistants are the rā tauaki – the mizzen sail. This secondary sail can help maximise the performance of the waka but only if well trimmed to do so. If appropriately selected, briefed, and supervised, assistants can contribute to the students' learning outcomes and overall safety and so enhance the EOTC experience. If not, they can become a sloppy, flapping sail, hampering the performance of the waka.

63. The EOTC co-ordinator is the tiratū matua – the mainmast. This mast provides the framework for the mainsail to propel the vessel along towards achieving quality learning outcomes. The EOTC co-ordinator has a central role in ensuring that the framework of the school's EOTC management systems is consistently applied school-wide and that everyone is involved in the safety process.

64. The board of trustees and principal form ngā riu – the double hull of the waka. Working side by side, they ensure that a robust structure of effective EOTC management policy and procedures is in place and that pedagogical practices support quality learning and safety outcomes for students. The double hull provides stability to reduce the chance of capsizing.

65. Where schools contract an outside provider, this provider may supply a management system for an EOTC activity* or event*, but the principal and board are responsible for checking that the EOTC management system is in place.

66. The government statutory requirements form ngā takere – the keels. These guide the direction of the double-hulled waka and further add to its stability. National bodies' good practice* and schools' and providers' policies and procedures are based on statutory requirements set by the government.

67. The national bodies form the kīato, here, and aukaha – the cross-beams and tight lashings that bind the two hulls of the vessel together. National bodies set standards by summarising good practice into codes of practice, guidelines, and manuals. These give the waka stability and reduce the chance of capsizing.

68. When schools follow these, they stabilise their whole EOTC programme*, increase the quality of students' learning, and decrease the likelihood of incidents*.

69. The EOTC management system is the kaupapa – the platform or decking, which connects the various parts and provides a foundation and meeting place for all. The school's EOTC management system is the kaupapa or basis for all EOTC learning experiences and contains everything, from the school's philosophy and rationale for taking students outside the classroom to learn, to safety management and emergency procedures and the post-event review process. Just as the kaupapa is built over the lashed beams, the EOTC management system closely follows good practice.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Specific responsibilities

70. Key groups involved in EOTC have specific responsibilities to ensure quality EOTC learning experiences are safe for all participants and schools' statutory and good practice responsibilities are met. The Board of Trustees and Principal will fulfil these responsibilities via delegation of responsibilities and through having policies and procedures in place.

71. The following order reflects the level of responsibility for each group:

- Boards of trustees and principals;
- The EOTC coordinator (at school-wide level);
- Person in Charge (at an EOTC event);
- Activity leaders (an EOTC event);
- Assistants;
- Students;
- Parents of students who participate in EOTC.

Responsibilities of the board of trustees and the principal

72. Under the Health and Safety at Work Act 2015, the board of trustees, as an entity, is a Person Conducting Business or Undertaking *(PCBU)* and has the primary duty of care.

As a PCBU, the Board's specific obligations are (so far as is reasonably practicable):

- providing and maintaining a work environment, plant and systems of work that are without risks to health and safety;
- ensuring the safe use, handling and storage of plant, substances and structures;
- providing adequate facilities at work for the welfare of workers, including ensuring access to those facilities;
- providing information, training, instruction or supervision necessary to protect workers and others from risks to their health and safety;
- monitoring the health of workers and the conditions at the workplace for the purpose of preventing illness or injury.

73. In the context of EOTC events, the board of trustees through the principal must ensure that policies and procedures are developed, implemented and reviewed which ensure that:

- risks are managed to prevent serious harm during EOTC events;
- equipment is safe to use during the event;
- students are supervised by competent staff; and
- emergency procedures are planned and followed.

74. Individual board members are officers of the PCBU and have a duty to carry out due diligence.

75. There are many other practical and legal responsibilities that may be relevant to an EOTC event*, such as those that relate to employment, food safety, transport, and privacy.

76. The responsibilities for boards of trustees and principals fall into three major areas: staff competence and best practice, health and safety, and equipment and resources.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Staff competence and best practice

77. The board of trustees and the principal must ensure that:

- an activity leader's competence is assessed against good practice*;
- only competent activity leaders are approved to lead EOTC activities;
- assistants have the appropriate skills, knowledge, and/or experience for their assigned role;
- contractors, parents* and volunteers have been screened for their suitability to work with students and where the Vulnerable Children Act 2014 applies, children's workers safety checked.
- all staff, contractors, volunteers, and students are involved in safety management planning and have been instructed in the health and safety procedures to be used during EOTC events; ensure that roles and responsibilities of all outside providers involved are clarified, understood and accepted. See the *Health and Safety at Work Act* 2015 for situations where more than one PCBU is involved;
- all staff, volunteers, and students consider utilising sustainable practices in the planning and implementation of EOTC (see appendix 1);
- staff have professional learning opportunities to develop the competence required to run the activities they are responsible for.

Health and safety

78. The board of trustees and the principal:

- understand and comply with their legal responsibilities;
- ensure that the school has a health and safety policy and procedures and that these are in place and implemented effectively;
- ensure that valid informed consent from parents and caregivers is obtained;
- ensure that all risks to health and safety are identified and to eliminate these risks so far as reasonably practicable through the application of appropriate safety management procedures; (See *Management of risk*)
- for example see appendix 4, sample form 2);
- ensure that responsibility for co-ordinating EOTC in the school has been assigned to competent staff (the principal, the EOTC co-ordinator, a senior staff member, or a committee) and adequately resourced;
- act appropriately to address any risks reported to the board in writing;
- maintain a register of incidents that either harmed or might have harmed any staff member, volunteer, or student;
- ensure plans to respond to emergencies or traumatic incidents are in place, including a clear process for dealing with media, and that all staff are familiar with them;
- regularly review the school's safety management systems;
- review incidents to determine any lessons learned and implement any recommendations made (see chapter 7, paragraphs 313-322);
- ensure that staff are provided with the time and the resources to visit EOTC sites during the planning stages of an event;
- ensure that all outside providers used for EOTC meet good practice criteria (see appendix 4, sample forms 5 and 6 for assistance with this) and where outside provision of an adventure activity* occurs a registered adventure activity provider is used (See the Worksafe NZ definition of an *adventure activity* and the public *register of adventure activity operators*).

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Equipment and resources

79. The board of trustees and the principal must ensure that:

- all circumstances and activities where safety equipment and/or clothing is necessary are identified;
- safety equipment and/or clothing is provided to safeguard all staff, volunteers, and students from any danger to their health and safety;
- safety equipment and clothing are stored securely and their use is controlled, their distribution is supervised, and that regular inventories are made;
- all people use safety equipment and/or clothing when required;
- all safety equipment and clothing complies with any relevant New Zealand standard or code of practice, is fit for the purpose, and is adequately maintained;
- a usage and maintenance log is kept for safety equipment and clothing (see appendix 4, sample form 16);

> "We try not to let the scary part of it get in the way of the school being able to do this."
>
> **Board member**

- all goods, materials, substances, and equipment are stored, secured, and kept so that they do not endanger people nearby;
- staff and students who may be responsible for goods, materials, substances, and equipment are fully instructed about their safe use and storage in accordance with any specific regulations, standards, or codes of practice (for example, fuel and stoves);
- communication devices are available and a communications plan is in place for EOTC activities* (see chapter 7, paragraphs 303-312).

Responsibilities of the EOTC co-ordinator

80. The EOTC co-ordinator is the person with full overview of EOTC in the school. It is the responsibility of this person to ensure that planning, process, and procedures are in place across all EOTC activities and that these are appropriately delegated and implemented.

The EOTC co-ordinator may be a teacher, senior staff member, or the principal (or a combination of these).

81. Ideally, the EOTC co-ordinator will have experience relevant to the school's EOTC programme* and a strong belief in using EOTC as an effective part of pedagogy to support teaching and learning. As with the board of trustees and the principal, the EOTC co-ordinator's responsibilities cover three major areas of staff competence and best practice, health and safety, and equipment and resources.

Staff competence and best practice

82. The EOTC co-ordinator, either directly or through delegation to the Person in Charge ensures that:

- he or she is familiar with the EOTC guidelines;
- only a competent person is approved as the Person in Charge or as an activity leader and that an activity leader's competence is assessed against good practice* (see chapter 4, paragraphs 155-158);
- roles and responsibilities have been clarified, documented, and agreed to by anyone who is placed in a role in which they interact with students, for example, the Person in Charge (who may be from another PCBU involved), or the activity leader, or an assistant (see appendix 4, sample forms 4 and 6);
- activity leaders check the safety of their EOTC activity and venue before the activity commences (see appendix 4, sample form 6).
- assistants who support EOTC activities are informed, trained, and supervised appropriately;
- outside providers meet good practice criteria (see appendix 4, sample forms 5 and 6 for assistance with this). Where outside provision of an adventure activity* occurs, a registered adventure *activity provider* is used (See the Worksafe NZ definition of an adventure activity and *register of adventure activity operators*).
- each student participating in an EOTC activity has access to a currently qualified first-aider.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Health and safety

83. The EOTC co-ordinator, either directly or through delegation to the Person in Charge, ensures that:

- the school has a policy in place on health and safety in EOTC (usually incorporated in the EOTC policy and/or the health and safety policy);
- procedures are in place to support that policy;
- reasonably practicable steps* have been taken to ensure the physical, emotional, and cultural safety of students and staff involved in EOTC;
- ensure that risks relevant to any planned EOTC event are identified and reasonably practicable steps are taken to eliminate or minimise these risks through the application of appropriate safety management procedures; (for example see appendix 4, sample form 2);
- risks that are relevant to the EOTC event and that cannot be easily eliminated, or minimised, have been reported in writing to the board of trustees for them to act upon appropriately;
- all incidents* are recorded in the school's incident register, reflected on, and appropriately responded to; followed up according to the board's procedures;
- the safety and emergency procedures for each EOTC activity* are identified and communicated to all activity leaders, assistants, and students;

"You get more of a thrill and you get the experience instead of just reading about it or hearing about it from someone else. The memories are stronger."

Year 7 student

- safety procedures are outlined in the EOTC management system;
- where there is a deviation from the policy, there is clear documentation of the reasons for it and how it is being managed and reported to the board;
- an emergency information sheet listing all health information and emergency contact details is compiled for students, staff, contractors, and volunteers responsible for students on an EOTC activity.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Equipment and resources

84. The EOTC co-ordinator, either directly or through delegation to the Person in Charge, must ensure that:

- safety equipment for EOTC is specified and used;
- first aid kits are accessible and available during all EOTC events (see chapter 7, paragraphs 325-336);
- hazardous substances are correctly stored, labelled, and transported;
- equipment is appropriately stored and repaired as required, equipment logs are kept (see appendix 4, sample form 16), and when equipment has reached the accepted use-by date, it is retired and replaced;
- a communications plan is detailed in the school's Traumatic Incident Response Plan (TIRP) and used to facilitate actions during an emergency (see chapter 7, paragraphs 303-312);
- procedures are in place for access to food, disposal of waste, and the protection of water, flora, and fauna during an EOTC event. These procedures are consistent with Department of Conservation *environmental care information* (also see appendix 1).

Responsibilities of Person in Charge

85. The Person in Charge (PIC) is the person who is overall in charge of a particular EOTC activity or event on behalf of the school. This person is responsible for managing a team of activity leaders and assistants during an event or is the sole activity leader. The PIC could be a registered teacher, could be a qualified instructor or sports coach.

86. When practicable, a school should, for every EOTC event, a PIC who is their employee. The PIC should have the required competency for their role. If managing a large group, this person should not be directly involved in supervising students but should be free to maintain an overview of the whole event.

87. There may be multiple Person Conducting a Business or Undertaking* (PCBUs) involved in EOTC. The respective PICs must* clarify with each other where and when their respective responsibilities apply and execute these according to best practice. (see also contracted outdoor providers, chapter 4, paragraphs 179-194.)

88. During the planning phase of an EOTC event, the PIC should have an understudy (a deputy). This person should be familiar with all aspects of the planning in case the Person in Charge is unable to attend the event at the last minute or has to leave the event while it is in progress.

The PIC's responsibilities cover three major areas:

Competence and best practice

89. Person in Charge must:

- be familiar with the EOTC guidelines;
- ensure that educational goals that meet the students' needs are established for the EOTC activity at the outset of planning;
- assess their own competence against good practice standards before planning begins and have their decision reviewed by a suitably competent expert;
- ensure that parents are given sufficient information about an EOTC event in writing and are invited to any briefing sessions. This is to ensure that they have enough information to give informed consent for their children to attend;

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

- make arrangement for parents whose first language is not English and/or te reo Māori, to allow them to be well informed and able to make a decision;
- brief parents and other volunteers, students, contractors, and staff about the EOTC event's objectives, the specific roles and responsibilities of all parties, the code of conduct, the school's safety management procedures (including contingency plans), and any relevant school policies;
- ensure that activities are sequenced to facilitate a progressive acquisition of skills and/or knowledge that will result in quality educational outcomes and safe participation for all;
- ensure there are readily accessible lists of all the participating students, activity leaders, and assistants. The lists should include emergency contact details, medical profiles, and any other pertinent information.

Health and safety

90. Person in Charge:

- should not be allocated direct responsibility for a group of students so that they can be free to oversee, manage and respond (where multiple groups and staff are involved);
- clarify and agree to specific roles and responsibilities with other PCBUs involved
- provide cultural safety for students by being sensitive to, and respectful of, different cultural practices, and by planning for them;
- ensure that students are involved in safety management planning;
- obtain informed parental consent for student involvement in EOTC activities as per the school's policy (see table 3.1 on pages 30-31 and chapter 3, paragraphs 134-153);
- ensure that all significant risks relevant to any planned EOTC event are identified and reasonably practicable steps* are taken to eliminate or minimise risks through the application of appropriate safety management procedures (see appendix 4, sample form 2);
- cancel the EOTC activity if an identified hazard cannot be adequately controlled;
- ensure reporting of all incidents in the school's incident register;
- ensure that appropriate contingency plans are in place;
- ensure that students' needs and any hazards associated with these (educational, cultural, health, medical, nutritional, and behavioural) are identified and managed.

Equipment and resources

91. Person in Charge ensure that:

- all staff and students know the location of the event;
- first aid kits, emergency equipment, and a means of communication that will work in your location are taken to the event;
- weatherproof copies of emergency procedures and contact details are provided to activity leaders to take it into the field;
- all equipment is returned to storage cleaned and in good repair and that usage and repair logs are completed.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Responsibilities of activity leaders

92. Activity leaders work under the leadership of a PIC and can be teachers, coaches, other staff, contracted providers (for example, instructors), adult volunteers, senior school students, or tertiary students. This group must have the appropriate competence for the activities they are responsible for. Appendix 4, sample form 5 may assist with this.

93. Through the use of activity leaders, EOTC activities involving large groups can be more effectively managed. In this way, safety can be maximised and students can more easily achieve the intended learning outcomes.

94. Activity leaders also have responsibilities in three main areas: competence and best practice, health and safety procedures, and equipment and resources.

Competence and best practice

95. Activity leaders:

- assess their own competence against good practice* standards before planning begins and have their decision peer- or expert- reviewed. Saying "no" to leading an activity is an accepted and respected response;
- instruct students in appropriate safety procedures and have practised them for themselves;
- ensure that students experience "challenge by choice"* (that is, they are encouraged, not forced or pressured, to participate in activities in a supportive group environment);
- are familiar with the EOTC guidelines;
- brief assistants on their specific role and responsibilities, the activity outcomes, their allocated students and the relevant school or contractor safety management procedures and/or policies that apply;
- assess the needs and capabilities of the students against the demands of the activity and make any necessary adjustments to the programme;
- ensure that there is minimal impact on the environment and that sustainable practices are used in all aspects of the EOTC activity (see appendix 1);
- make every effort to deliver the activity so that educational goals and students needs are met.

Health and safety.

96. Activity leaders:

- must take reasonably practicable steps* to ensure their own safety and the safety of other staff, contractors, volunteers, and students during EOTC activities and ensure that no action or inaction on their part causes harm to any other person;
- must comply (so far as they are reasonably able) with any reasonable instruction that is given by PCBU to allow the PCBU to ensure health and safety:
- must co-operate with any reasonable policy or procedure of the PCBU relating to health and safety that has been notified to them;
- ensure that activities are sequenced to facilitate a progressive acquisition of skills and/or knowledge that will result in quality educational outcomes and safe participation for all;
- provide cultural safety for students by being sensitive to, and respectful of, different cultural practices and by planning for them;
- inform assistants of any cultural practices relevant to the group and emphasise the need to respect them;
- understand and follow the safety requirements of all the activities they are responsible for and determine any special care that should be taken by themselves, the assistants and the students. This includes ensuring they take medical and other relevant information for their group into the field;
- identify all hazards and risks*;
- ensure that hazards, such as unsafe equipment and practices, are reported in writing to the EOTC co-ordinator and/or the Person in Charge;
- cancel an EOTC activity if an identified hazard or risk cannot be adequately controlled;
- report all incidents* in the school's incident register;
- understand and know how to implement any applicable contingency plans;
- ensure that students' needs and any hazards associated with these (educational, cultural, health, medical, nutritional, and behavioural) are identified and managed;

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Equipment and resources

97. Activity leaders must ensure that:

- appropriate safety equipment and/or clothing is used when required;
- safety procedures for specific activities and use of equipment are known;
- equipment logs are referred to before any equipment is used;
- first aid kits, emergency equipment, and a means of communication that will work in their location are taken;
- weatherproof copies of emergency procedures and contact details are provided to activity leaders to take into the field:
- all equipment is returned to storage cleaned and in good repair and that usage and repair logs are completed;
- food and drink are taken regularly by participants, during an EOTC event*, to maintain energy levels.

"When students move up the school, they are often ... integral to writing the and planning for safety."

Principal

Responsibilities of assistants

98. Assistants can be teachers, support staff, adult volunteers, and tertiary or senior students. They differ from an activity leader in that they do not necassarily have the required competence for that role. Such people should be assigned to an activity leader as an assistant. They should be given the students' medical details and other relevant information on their group and the activity, and they should be briefed on the risk management and emergency procedures. The level for supervision of an assistant should be in proportion to the level of risk in the activity. Supervision of an assistant may, therefore, be direct or indirect. (See appendix 4, sample form 4).

99. **School staff** acting as assistants on EOTC experiences* continue to act as employees of the school whether the excursion takes place within normal school hours or outside those hours. Staff must* do their best to ensure the health and safety of everyone in the group and act as any reasonable adult would do in the same circumstances.

They should*:

- follow the instructions of the activity leader or Person in Charge and help with control and discipline;
- consider stopping the excursion or the activity and notifying the activity leader if they think the risk* to the health or safety of the participants in their charge is unacceptable.

100. **Adult volunteers** (including parents* and tertiary students) and senior students acting as assistants on the EOTC experience should be clear about their roles and responsibilities during the activity.

They should:

- do their best to support the activity leader and ensure the health and safety of everyone in the group;
- not allow themselves to be left in sole charge of participants, except where it has been previously agreed as part of the risk assessment;
- only accept the responsibility of being a supervisor if they are comfortable with the role and the skills they have;
- follow the instructions of the activity leader and the Person in Charge and help with control and discipline;
- speak to the Person in Charge or the activity leader if they are concerned about their own health or safety or that of participants at any time during the EOTC experience.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Responsibilities of students

101. Students involved in EOTC activities* have some basic responsibilities for their own safety and the safety of others. It is recommended that a code of conduct be co-constructed by all involved, including the teacher, students, and helpers. If special rules apply to a particular activity, they should be explained at the start of that activity.

102. An EOTC safety code of conduct could include the following:

- Take an active part in developing and implementing this code of conduct.
- Follow the instructions of your activity leader.
- Touch potentially hazardous substances or equipment only if and when told to do so.
- Avoid behaviour that could lead to incidents*.
- Wear appropriate clothing at all times and confine long hair and loose clothing during activities where they are a hazard.
- Know what to do, and co-operate fully, during an emergency situation.
- Eat and drink regularly to maintain energy levels.
- Use equipment appropriately and take care to minimise damage or loss.
- Report any faulty or ill-fitting equipment to the Person in Charge.
- Report any incident to the Person in Charge immediately.
- Carry out your responsibilities to the best of your ability – look after one another.
- If lost – stop, stabilise, advertise. Stop (stay together and stay put; move only if you are exposed to the weather), stabilise (provide warmth, shelter, food, and drink), and advertise (draw attention by use of a whistle or by visible signs).
- Challenge yourself within your personal limits (both physical and psychological). Support others to do the same but refrain from pressuring them.
- Tell your activity leader if you feel unsafe or see any unsafe practices in an EOTC activity* that you are involved in.
- Look out for anything that might hurt or threaten you or anyone in the group and inform the activity leader about it.
- Always participate in EOTC activities responsibly and under supervision.
- Use sustainable practices and follow Department of Conservation the *New Zealand Water Care Code* (also see appendix 1).
- If overseas, be sensitive to local customs.
- Treat the environment as taonga (a treasure).

103. Any students whose behaviour may be considered to be inappropriate or a danger to themselves or to the group may be stopped from going on the EOTC event*. For those students, the curricular aims of the experience should* be fulfilled in other ways wherever possible. (See also appendix 4, sample form 11 Student Contract.)

Responsibilities of parents of students who participate in EOTC

104. Parents* responsibilities in supporting their child's learning in EOTC are important particularly in providing information to help meet their child's needs and keep them safe.

Parents' responsibilities

- Provide informed consent for your child to participate in EOTC experiences that extend out of school hours or involve more than a minimal level of risk based on the information you have been provided with (see appendix 4, sample forms 7 and 9). If you are unsure of anything, ask questions.
- Provide updates on your emergency contact numbers whenever they change.
- Provide any information about your child's emotional, psychological, and physical health that might be relevant to the EOTC event (usually by means of the health profile form, see appendix 4, sample form 18).
- Help prepare your child for the EOTC experience, for example, by reinforcing the students' EOTC safety code of conduct and by helping them to obtain everything on the gear list. The school may have some gear available.
- Support the school on matters such as an "early return agreement" for unacceptable behaviour.

See also chapter 3, paragraphs 134-153.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Summary

105. Safety is more than something teachers "do" for students. Everyone involved in an EOTC activity or event should be aware of, and take an active part in, safety management procedures. This includes students, activity leaders, assistants, EOTC co-ordinators, principals, and boards of trustees. While all involved are responsible for different aspects of safety management, together they contribute to quality learning experiences and comprehensive safety coverage.

106. Involving students in the planning of EOTC experiences is essential. This allows them to have input, motivates them to think about their learning and safety in a meaningful way, and creates a sense of ownership. Students' involvement in safety management must be in keeping with their age, level of knowledge, and the skills required for the task. Ultimately an individual student needs to be responsible for his or her behaviour. In EOTC situations, students must be aware of this responsibility at all times.

"When we went to the zoo, we got really close to the animals. It was really interesting."

Primary student

107. While activity leaders may involve students in safety management procedures, ultimate responsibility for safety belongs to the board, the principal, and the activity leader or Person in Charge. Therefore, they must make all final calls and decisions that are critical to safety.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Chapter Three

PLANNING

WHAKATAUKĪ

Te toia, te haumataia.

Launching a canoe

Anticipation and excitement are part of the launching – but nothing can be achieved without a plan, a workforce, and a way of doing things.

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Planning for EOTC

108. Quality planning is necessary to enhance students' learning outcomes and to strengthen safety management in EOTC. Quality planning includes:

- keeping the risk management and paperwork proportional to the level of risk*;
- having a systems approach to EOTC management;
- having clear communication with parents*.

109. Quality EOTC management systems will comply with the school's and/or provider's quality management systems (QMSs).

Managing the paperwork

Keeping it proportional

110. The level of risk management (and paperwork) for EOTC should be in proportion to the level of risk associated with the EOTC activity* type. The various EOTC activity types and the suggested planning and paperwork that are appropriate for them are shown in table 3.1. Considerations include:

- who should give final approval for the activity;
- parental consent*;
- risk management planning.

111. It is assumed that parents will be informed of all activities that their children will participate in, regardless of the type. Decisions on whether separate parental consent should be obtained are linked to whether the activity extends out of school hours and into family time and/or whether the activity involves more than a minimal level of risk.

Types of EOTC activities

112. The various types of EOTC activities have distinct characteristics, which require different considerations and levels of risk management if they are to facilitate positive learning outcomes for students. EOTC venues range from lower to higher risk environments, from the foreshore to mountain tops, and from urban and rural to natural environments.

"No child ever gets left behind. They all go whether they can afford it or not."

Board member

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Table 3.1
Management Guide for EOTC Activity Types

	Activity Type	Description Examples are indicative and not a complete list.	Approval	Parental Consent	Risk Management Planning
A	On site – in the school grounds	**(i) Lower risk environments** eg: sports day, horticulture, adventure-based learning (ABL)* activities, painting murals, measuring for mathematics.	None required	None required	Current health information Usual lesson planning
		(ii) Higher risk environments eg: school pool or climbing wall.	Blanket consent	Blanket consent	Current health information Usual lesson planning or generic SAP*, RAMS*, or similar form (see appendix 4)
B	Off site – short visits in the local community within school hours	**(i) Lower risk environments** eg: museum, art gallery, botanic gardens, sports and recreation events.	Senior staff or EOTC co-ordinator	None or blanket consent (school decision)	Current health information Generic SAP or RAMS or similar form (used by all staff)
		(ii) Higher risk environments eg: aquatic environments (river, beach), cross-country-run training.	Senior staff or EOTC co-ordinator	Blanket or separate consent (school decision)	Current health information Generic SAP, RAMS, or similar form (see appendix 4)
C	Off site – day trips, which may extend out of school hours	**(i) Lower risk environments – lower technical skills required** eg: farm visit; day hike in a local park or in local bush; city visit; train, bus, or ferry trip; swimming in pools.	Senior staff or EOTC co-ordinator	None or blanket consent (school decision)	Current health information Generic SAP, RAMS, or similar form (see appendix 4)
		(ii) Higher risk environments – higher technical skills required eg: skiing, waka ama, rock climbing, swimming in natural environments (beach, river), field trip involving chemicals or heavy machinery.	Principal or EOTC co-ordinator	Separate consent and risk disclosure	Current health information Specific SAP, RAMS, or similar form Other appropriate forms in appendix 4

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Table 3.1
Management Guide for EOTC Activity Types (continued)

	Activity Type	Description Examples are indicative and not a complete list.	Approval	Parental Consent	Risk Management Planning
D	**Off site – residential multi-day trips further afield**	**(i) Lower risk environments – lower technical skills required** eg: trip to another region; sports tournaments; field trips to urban environments, historic sites, and "front country" (having well-formed tracks).	**Principal or EOTC co-ordinator**	**Separate consent**	**Current health information** Specific SAP, RAMS, or similar form Other appropriate forms in appendix 4
		(ii) Higher risk environments – more knowledge and/or technical skills required eg: overseas trips; field trips into natural water, bush, or alpine environments, or other hazardous environments (for example, where chemicals, heavy machinery, or other hazards are present); outdoor education camps; outdoor pursuit journeys in the "back country" (for example, biking, tramping, canoeing).	**Principal and/ or board**	**Separate consent and risk disclosure**	**Current health information** Specific SAP, RAMS, or similar form Other appropriate forms in appendix 4

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

A systems approach

113. A systems approach to EOTC management contributes both to safety and to students' learning outcomes. Good systems within a school reduce work for staff and enable them to focus on effective teaching. Systems also help to ensure that EOTC policy and procedures are applied consistently across the school.

"The kids are more receptive … outside the classroom … it's more fun for them and they are eager to learn. Their learning is strengthened, and we're seeing a difference in their assessments."

Kura principal

Variance

114. Schools should document the circumstances under which they will permit any variation from the school's EOTC management policy or procedures. Activity leaders should be able to justify any variations made to the schools or an outside provider's EOTC policy or procedures. Variation should only be considered when the safety of an individual or group is compromised by following the existing policy or procedures.

EOTC management system

115. Schools must* have records of their decision-making processes to show how they fulfil their legal and professional obligations and how they follow current best practice in all aspects of EOTC. Records should be available on request.

116. To achieve this, each school will have an EOTC management system that includes procedures for managing the following areas:

- learning outcomes;
- approval processes;
- staff, students, contractors, and volunteers;
- safety and risk management;
- emergency response;
- programme development and review.

See appendix 4, sample form 10 for an EOTC management self-audit checklist.

Other planning considerations

117. The national curriculum sets out principles that should underpin all schools' decision making. These principles should also guide decisions on EOTC. For example, the principle of future focus encourages students to look to the future by exploring significant issues, such as sustainability. The following reflective questions relating to sustainable practices may be useful for teachers to consider when planning an EOTC event*

- **Travel** – how can we minimise our carbon footprint? Can we car-pool, reduce distances, or use public transport?
- **Action** – is there a "giving back" component or an action for the environment in this activity?
- **Waste** – what systems are in place to minimise and recycle our waste?
- **Food** – can we reduce packaging or use locally grown, organic food that is not overly processed?
- **Minimum impact** – how will we ensure our practices are consistent with the New Zealand Environmental Care Code. (See appendix 1.)
- **Social justice** – can everyone in the class afford to participate in this learning experience? Have the special and/or cultural needs of all students been addressed? Are there ways to ensure that everyone is included in the EOTC learning experience?

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

EOTC management process

Five stages of EOTC management

118. A range of tools is available to assist schools with their EOTC management. These tools support the SMS template and are in the Tool Kit for EOTC Management in appendix 4. The following five-stage process is suggested for EOTC management. (See figure 3.1 for a flow chart.)

Stage 1: Initial planning and approval.

Stage 2: Planning and preparation. (people and programme management)

Stage 3: Pre-event planning checkpoint and final approval.

Stage 4: Implementation of the EOTC event*.

Stage 5: Post-event review and evaluation.

119. It is up to each school to decide on appropriate timelines for each stage. Timelines may differ for different types of activities or events.

Stage 1: Initial planning and approval

120. Before a proposed EOTC event is planned, initial planning approval should* be gained from the person/s the board has delegated this responsibility to. Approval may be verbal or written depending on the level of risk of the activity. These people would usually include:

- the principal, and/or;
- senior staff, and/or;
- the EOTC co-ordinator.

121. Usually, the greater the level of risk* with an activity, the more senior the staff member(s) delegated to approve it. In the case of category D(ii) EOTC activities, the board may wish to be involved in the approval process or informed of the activity prior to approval. It is then the responsibility of the approver to keep the board informed as per the usual reporting procedures.

122. The board of trustees is responsible for having an EOTC policy or health and safety policy that includes a statement about off-site learning. Implementation of those policies will generally be the responsibility of the principal, who is expected to utilise the expertise within the school, and beyond if required.

123. Different people may be delegated to approve different types of activities. See table 3.1 on pages 30-31 for suggested approvals for certain types of activity. Boards of trustees, in their governance role, should be assured that procedures are in place and that the principal is satisfied that the procedures have been followed.

124. In approving an EOTC event, the following will be considered:

- the school's curriculum and charter;
- safety management, including required staff competence;
- the budget.

The board must approve any overseas trips that are planned by the school. An overseas trip can be funded through Crown funding or locally raised funds (ie through fundraising or parental contributions).

A board may use Crown funding (as opposed to locally raised funds) for overseas travel if they can demonstrate that the two main conditions have been met:

- the overseas travel supports student achievement
- they have considered the proposed spending against competing priorities

Before approving any travel, the board must complete the *Funding Overseas Travel Using Crown Funding Checklist*. The board must keep the signed and completed checklist, along with the board minutes of each decision and make these available for audit purposes. All expenditure should be accounted for and receipts returned following the trip.

Examples of overseas travel that may further student achievement include but are not limited to: visiting the site of a significant cultural event (e.g. a battle where the school community had significant casualties), senior Māori groups visiting Pacific Islands where ancestral stories originate (e.g. Tahiti), or language students visiting a country where the language of study is primarily spoken.

Further advice on overseas travel that can be found on page 11 of these guidelines *Financial-Information-for-Schools-Handbook*.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

125. Before students participate in an EOTC event, parents* need to be informed about the programme. Additionally, parental consent* will be required for some events, particularly those that extend outside normal school hours and/or involve more than a minimal level of risk. Table 3.1 suggests the level of parental consent appropriate for the different activity types.

Stage 2: Planning and preparation

126. Once initial planning approval has been granted, full planning and preparation for an EOTC event* can begin. At this stage:

- important information must* be collected from and about all the people involved in the EOTC event, including the students, parents*, teachers, volunteer helpers, and contracted providers;
- the programme must be carefully planned, with risks* identified, assessed, and managed and emergency procedures put in place;
- all those participating in the EOTC event should* be involved in the planning and evaluation. This includes teachers, outside providers, volunteer helpers, and students.

127. If the event your are planning for involves hazards/risks that may lead to serious harm, you may find the FLASH (a risk assessment tool) useful in your planning stages. Further information about the tool can be accessed on: *http://eotc.tki.org.nz/Media/Files/FLASH-Rating-A-Risk-Communication-Tool.*

Stage 3: Pre-event planning checkpoint and final approval

128. Just prior to an event, all planning should be reviewed to ensure that the EOTC event will enable students to meet their learning outcomes and will meet the safety requirements. Emergency procedures should also be finalised at this stage. If all is satisfactory, the EOTC event can be given the final approval to go ahead. The board should be informed of the decision.

Stage 4: Implementation of the EOTC event

129. This stage involves students participating in a stimulating EOTC event. For teachers, on-site critical thinking and action, based on sound judgement, ultimately ensure that learning and safety are maximised. Lesson plans and other planning tools from all stages underpin this stage and may be referred to during the event.

Stage 5: Post-event review and evaluation

130. After the event, it is important to reflect and evaluate so that the next steps for learning can be planned and so that safety can be continually improved. Some focus areas for review and evaluation include:

- the learning outcomes for students;
- any feedback on the event from staff, students, volunteers, and contractors;
- any incidents* reported and reviewed;
- the equipment logged, cleaned, repaired if necessary, and returned.

Based on the results of the review and evaluation activities, follow-up may occur.

Self, peer, and external review

131. Under the National Administration Guidelines (NAG 2), schools are required to self-review their policies, plans, and programmes, including, as part of the review, evaluation of information on student achievement. Peer and external reviews can also assist schools to provide high-quality programmes.

- EOTC policy, procedures, and programmes should be reviewed as part of the school's regular review cycle and following any significant incident in the school or nationally.
- Each EOTC event should be reviewed to identify whether safety could be improved and whether the students' intended learning outcomes were met.
- It can be useful to invite a school with a similar EOTC programme to peer-review your EOTC management systems. This could be done on a reciprocal basis.
- An EOTC self-audit checklist can help schools to ensure it has the required procedures in place AND should their programme require, it can prepare them for external safety audits and accreditations.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

- Professional outdoor organisations can assist schools in reviewing the safety of their programmes or activities (see appendix 3).
- When the Education Review Office (ERO) reviews a school's EOTC safety management system, they will check against the EOTC management self-audit checklist. For further information see this link on: *Schools' use of EOTC Guidelines*

Safety management tool kit

132. Appendix 4 contains a tool kit with a selection of sample forms designed to assist schools in implementing the five-stage EOTC management process described above. The forms can be adapted by schools to meet their needs and to reflect the level of risk associated with the chosen activity. Ideally, these tools should be available to all staff on the school's intranet. Each form details a safety management procedure. Depending on the level of risk associated with the activity, some management procedures may be carried out informally (for example, verbally) rather than using a form.

The five stage process – where the tools fit

133. Figure 3.1 shows how the procedures and forms in appendix 4 could fit into the five-stage EOTC management process. The numbered sample forms from appendix 4 are listed in the appropriate planning stage on the flow chart. Note that not all forms and procedures are required for every EOTC event. Depending on the nature of the event, procedures may be carried out informally (verbally) or formally (using a form).

Figure 3.1
The Five Stages of EOTC Management

Stage 1 — Initial planning and approval

Planning and Approval Process

1. EOTC Event* Proposal Approval and Intention form
10. EOTC Event Prepare and Implement Checklist
3. EOTC Competency Requirements and Staffing

Stage 2 — Planning and preparation

People

8. Parent information letter
7. EOTC Blanket Consent form
9. Parental Consent
18. EOTC Health profile
5. EOTC Staff Compentency Record form
4. EOTC Volunteer Agreement form
11. EOTC Transport Plan
12. EOTC Drivers and Passenger Permission form

Programme

Lesson Planning Process

EOTC experience* planned to support teaching and learning of the school's curriculum

Risk Management Process

2. EOTC Risk Assessment form

Outside Provider

6. EOTC External Provider Agreement form

Stage 3 — Pre-event planning checkpoint and final approval

10. EOTC Event prepare and implement checklist
14. EOTC Emergency Response Guide

Stage 4 — Implementation of the EOTC event

Careful observation, critical thinking, and action based on sound judgement by competent staff ultimately ensure that learning and safety outcomes are met.

Information from other stages underpin this stage and will be accessible and referred to during the event.

Stage 5 — Post-event review and evaluation

10. EOTC Event Prepare and Implement Checklist
17. EOTC Event Review
16. EOTC Equipment Log
15. EOTC Incident Report

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Communicating with parents

Information to parents

134. Communication with parents* is important. Parents should* be informed in writing of any off-site activity or event unless it is a regular part of the school curriculum, which parents have already been informed about through the blanket consent process, the school newsletter, a handbook, an email or a letter. Seeking blanket consent annually for such routine excursions may be appropriate.

135. For residential camps and visits, multi- day adventure activities*, or travel overseas, parents should be provided with written details and encouraged to attend a briefing meeting.

136. The information given to parents should be sufficiently detailed to ensure that they can make an informed decision about their child's participation, bearing in mind that many activities have a high level of perceived risk* but a low level of residual risk*. There should be alternative arrangements for parents who cannot attend meetings or for whom English and/or te reo Māori is not their first language.

"A permission form goes home at the beginning of the year so we don't have to do it every time. The parents are onside and can see the value of doing this."

Teacher

137. Parents should be assured that the activity leaders and assistants on the EOTC activity* will be exercising the same care as a professional teacher, instructor, or coach. Parents should be sent adequate written information about the EOTC event*. This would typically include a covering letter, an event programme, and consent and health forms. Depending on the nature of the event, some of these may be combined. See appendix 4, sample form 8, for a list of information to include in a covering letter and the forms for parents.

Blanket consent

138. Parental consent* is not usually required for routine EOTC experiences* in the local community within school hours, which involve a low level of risk (activity types A(ii), B(i), B(ii), and C(i) in table 3.1 on pages 30-31).

139. Some schools manage consent for these types of activities by getting parents to sign a blanket consent at the beginning of the year or at the time of the student's enrolment. (see appendix 4, sample form 7).

Separate consent

140. EOTC activity leaders should consider seeking separate parental consent for activities in categories B(ii), C(ii), D(i), and D(ii) in table 3.1 on pages 30-31. These include:

- non-routine events;
- adventure activities;
- hazardous environments;
- overseas trips;
- other residential events;
- remote supervision*.

141. A parental consent form should be completed for each student in the group. If parents withhold consent absolutely, the student should not be taken on the EOTC event, but wherever possible, the learning outcomes of the visit should be delivered to the student in some other way. If the parents give conditional consent, the school will need to conduct an individual risk assessment on whether the student may be taken on the EOTC event or not.

142. The contents of a consent form for parents to sign will vary according to the type of EOTC activity. For examples see appendix 4, sample form 9.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Parental consent and risk disclosure

143. Schools should* ensure that parental consent* is gained before students are involved in certain EOTC activities*, such as those included in categories C (ii) and D (ii) in table 3.1.

- As part of seeking consent, schools should inform parent/s* of any generic and specific risks* associated with the programme and the strategies proposed to mitigate these risks (see appendix 4, sample form 9).
- There should also be provision for the parent/s to inform the school of any risks associated with their child's involvement, for example, a student's special requirement/s; skills, or lack of them; medical and health conditions; or cultural practices (see appendix 4, sample form 18).

144. A risk disclosure section on a parental consent form does not remove a school's legal responsibilities towards its students.
A risk disclosure statement does have the advantage of bringing to the minds of all parties involved that risks exist, that measures to prevent those risks are being taken, and that a continual surveillance of any risk is everybody's obligation. Parental consent or risk disclosure forms will be most effective when:

- risks are clearly explained so that parents and students understand them;
- parents and students are given the opportunity to ask questions;
- activities are entered into voluntarily (challenge by choice*).

Medical consent and health information

145. It is important to obtain medical and health information from all participants involved in an EOTC event* in order to effectively manage any health issues that may arise. See appendix 4, sample form 18 for a guide to the items to include on your health form. It is important to keep student information, including health information, up to date.

146. Parents should be asked to agree to the participant receiving any emergency treatment, including anaesthetic or blood transfusion, that is considered necessary by medical authorities in the event of an incident. If parents do not agree to this, schools may decide to withdraw the child from the EOTC trip, given the additional responsibility this would entail for the Person in Charge.

147. Doctors can be expected to carry out necessary emergency treatment without parental consent, but it is possible that a surgeon in another country might be reluctant to operate on a student unless assured that the parent had given authorisation agreeing to such treatment. For overseas trips, it is sensible to include a translation (in the relevant foreign language) of the medical consent form, as signed by the parent.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Transport consent and safety

148. Schools should* give careful thought to planning transport for an EOTC activity* because it is much more dangerous to travel to an event than to participate in one (Fulbrook, 2005). Schools should consider whether parental consent* should be obtained to transport students in the private vehicle of a teacher, another adult, or a student during the EOTC event*.

See appendix 4, sample forms 5, 11 and 12.

149. Schools should have good transport policies in place and follow them. Principles to consider include the following:

- All vehicles (including personal cars) must have current registration and a current warrant of fitness (or certificate of fitness for commercial vehicles).
- All vehicles should be appropriately insured.
- Drivers, including students, must be appropriately licensed and aware of all driving regulations that apply.
- Drivers and passengers should wear seatbelts where fitted and required. Students do not have to be seated in an approved child restraint if they are travelling in a bus when no appropriate child restraint is available, however, where a safety belt is available, students must be restrained, and where an approved child restraint is available, it must be used (where appropriate for the child's age and weight). Further information is available on New Zealand Transport Agency's (NZTA) website: *Requirements for child restraints*.
- Drivers should be trained and/or competent to drive the vehicle in the intended traffic, road, and weather conditions (for example, city rush hour or mountain roads in icy conditions).
- The number of driving hours required for the journey and the length of the driver's working day (including non-driving hours) should comply with NZ Transport Agency (NZTA) regulations. *www.nzta.govt.nz*.
- Strategies should be in place to avoid driver fatigue (for example, having more than one driver or planning stopping points on long journeys for toilet breaks and refreshments).
- Due consideration be given that there should be an observer in the vehicle who is awake at all times and observant of the driver and driver fatigue.
- There should be contingency funds and arrangements in case of breakdown or emergency.
- If staff use their own cars for work, they should be aware that this could affect their insurance cover, so get them to check with their insurance company before doing so.
- There should be an effective supervision structure in place when travelling on buses (see chapter 4, paragraphs 208-211). This becomes critical in case of an incident in transit.

Early return agreement

150. Schools should inform parents* if they will be expected to fund the early return of a participant whose conduct gives cause for concern on an EOTC trip. A written agreement may be necessary.

> "You make a lot more friends when you go out of the classroom."
>
> **Year 5 student**

Emergency contact

151. Schools should ensure that parents can contact their child via the principal or activity leader in the event of a home emergency and that the school has a number to ring to provide information in the event of an incident* during the EOTC event or a late arrival home.

152. Parents should therefore:

- know the destination details of the EOTC event;
- be aware of the school's emergency contact arrangements for all the venues the group will visit (this is particularly important during holiday periods, when the school may be closed);
- provide the school with contact numbers for day and night use in an emergency.

This is best done by means of a covering letter and consent form (see appendix 4, sample forms 8 and 9).

Students' contact with parents

153. Students may wish to speak to their parents while they are away taking part in an EOTC event. Arrangements should be agreed with parents and students before the EOTC event takes place, and these should take account of the school's policies on the use of phones, both mobile and landline, during EOTC events.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Chapter Four

STAFFING AND SUPERVISION

WHAKATAUKĪ

Ka haere te mātātahi
Ka noho te mātāpuputu.

Youth rushes in;
Age deliberates.

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Cornerstones of learning safely

154. To ensure adequate staffing and supervision of EOTC activities*, it is essential to have:

- competent staff;
- clearly identified roles and responsibilities for all involved;
- effective supervision.

This chapter addresses these cornerstones of learning safely through EOTC experiences*.

Competent staff

Competence

155. The competence of staff is critical for the safety of all participants and to ensure quality learning through EOTC. While this has always been emphasised by Ministry of Education policy documents, analysis of serious incidents* that have occurred during EOTC experiences has shown that a lack of leader competence and ineffective supervision were major contributing factors. It's worth noting the need for looking at the activity tasks and skill set required before determining competence for the role.

> "When we're looking for people to come and work here, we want to see that they are enthusiastic and passionate about things, especially relating to EOTC."
>
> **Principal**

156. Competent leadership of EOTC events* is inextricably linked to safety. The board of trustees must* ensure, through the principal, that activity leaders and the Person in Charge of the event are competent for the job. If the school does not have competent staff for the planned activity, they should* either adjust the activity to match staff competence or contract a competent outside provider. The priority is to address the intended learning outcomes and safety requirements.

157. The following are recommended core competencies for EOTC activity leaders. Activity leaders should have:

- the ability to teach, instruct, and/or coach;
- the ability to plan progressive development programmes;
- relevant knowledge, skills, and experience;
- a current first aid certificate;
- the ability to identify and manage risks*;
- crisis management skills;
- leadership skills;
- sound judgment;
- communication skills;
- group management skills;
- knowledge of sustainable practices;
- cultural awareness and a respect for all people;
- the confidence to say no.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

158. The desirable personal attributes of EOTC activity* leaders include:

- empathy;
- flexibility;
- motivation;
- a positive self-concept;
- problem-solving abilities;
- physical fitness;
- safety consciousness;
- approachability;
- assertiveness.

"They all go regardless of their disabilities. The senior students act as guides, and everyone ensures that the students with disabilities are included in the outings."

Kura principal

Developing staff competence

Deep professional learning

159. Timperley (2008) identified principles of teacher professional learning and development that evidence shows have a positive impact on valued student outcomes. In order to make effective changes to their practice (deep learning), teachers need to be in an environment of trust and challenge, engage in interaction with their colleagues, and (sometimes) have opportunities to benefit from external expertise that challenges their existing assumptions and helps them to develop new knowledge and skills.

160. The identified principles of professional learning and development are not intended to be stand alone but to be integrated. Schools can incorporate them into professional learning opportunities for teachers, including EOTC activity leaders *(refer to further information on teacher professional learning and development).*

Professional learning and development planning

161. Ongoing staff professional learning and development is an effective means of improving and extending competence in leading, coordinating and delivering EOTC (Haddock et al (2009). Schools can provide staff with opportunities to:

- gain formal training and qualifications, for example, in first aid, risk management, or activity-specific knowledge and skills;
- co-lead with, or be mentored by, an experienced leader;
- gain and log personal experience in the activity (logged experience is a prerequisite to gaining some formal qualifications in New Zealand).

Building capability

162. Principals may consider using the following approaches to build staff competence in order to address any gaps:

- tailor EOTC programmes* according to available expertise;
- aim to employ the best staff available, looking for those who are keen to learn and grow and so have long-term potential;

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

- engage competent activity leaders (voluntary or contracted providers) to support teachers and develop a long-term relationship with them;
- build capability in the school's staff: have more-experienced staff, volunteers, or contractors mentor less-experienced staff;
- keep programming flexible in order to incorporate existing staff strengths;
- match staff with complementary strengths to ensure that the staff as a whole have the required competence;
- adjust variables, such as the location, supervision plan, or a trip's goals and activities, to match staff competence in order to ensure a programme's success;
- provide professional learning and development opportunities for staff to help them gain the core competencies and desired personal attributes;
- keep staff up to date with EOTC developments and issues through professional reading and involvement in professional associations. Schools can subscribe to appropriate journals and publications.

Outdoor leader competence

163. Safe practices within outdoor activities are based on quality systems and the competence of all outdoor leaders, including activity leaders. A competent outdoor leader will hold a relevant qualification (or award where it exists) or will be able to demonstrate equivalency*. Where a qualification does not exist (for example, for river tubing), the leader should know how to meet good practice* standards for that activity. Qualifications and good practice standards for different outdoor activities are covered in chapter 6 and appendix 2.

164. If an activity meets the definition of an adventure activity* as defined by legislation, any contractor used must* be a registered adventure activity operator and their competency will be independently assured for that particular activity (see Contracted outdoor providers, paragraph 179).

If school staff are going to lead the activity they should have equivalent skills and procedures.

Outdoor leader training and qualifications

165. Schools should* have high expectations for the training and qualifications of outdoor leaders. While it is not mandatory in New Zealand to hold a qualification to lead most outdoor activities (with the exception of rafting), good practice standards indicate that a qualification, where available, is expected. At the very least, outdoor leaders, including teachers, should be able to demonstrate equivalency*. NB – a claim of equivalency implies that the person making that claim has a close knowledge of the relevant qualifications, their specific syllabi, and the expected performance standards. Demonstrations of equivalency should be evidence-based and endorsed by someone with a higher level of expertise.

166. Haddock et al. (2009) researched the training and qualification needs of New Zealand teachers who lead EOTC activities and found that the research participants (mainly school principals) emphasised that:

- EOTC leaders need to be able to manage risk, to be able to deal with emergencies, and to have a current first aid qualification;
- training is important for leaders of all EOTC activities;
- teachers leading higher risk outdoor pursuit activities need to be appropriately trained and qualified;
- training for teaching swimming is important for primary school teachers.

Training and qualification pathways for outdoor leaders

167. Qualifications are available for outdoor leaders, and there is a trend among outdoor leaders towards holding qualifications that provide an independent assessment of their competence in good practice. These qualifications include generic risk management, first aid, and activity-specific qualifications.

168. Training and qualification pathways are improving all the time. Various organisations provide quality- assured qualifications suited to teachers who lead or assist with EOTC experiences*. A range of activity-specific qualifications at all levels is available (see table 4.1). Details of further training opportunities and advice is available from the following agencies: *www.skillsactive.org.nz*, *www.nzoia.org.nz* and *www.eonz.org.nz*

169. The Ministry of Education has study support grants that are suited to secondary teachers who wish to attain outdoor leader qualifications. For details go to *https://www.teachnz.govt.nz/teacher-awards/*

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Table 4.1
Examples of qualifications available

Outdoor leadership level	Examples of Qualifications available
Foundation Basic knowledge fundamental to all outdoor activities	Education outside the classroom (EOTC) outdoor activity supervision, first aid
Leader Lead groups in lower technical environments	Outdoor leader, bush-walking leader, kayak leader, mountain bike leader, rock-climbing leader, abseil leader, flat water kayak, indoor climbing wall
Instructor Instruct in skills and lead groups in more technical environments	Bush, rock, abseil, kayak, canoe, sea kayak guide, sea kayak instructor, cave, alpine
Senior Instructor/Coach Instruct in skills and lead groups in higher technical environments. Train the instructors or leaders; may work as assessor or moderator of qualifications	Bush, rock, alpine, kayak, sea kayak, cave, canyoning

Pathways for sport co-ordinators

170. Sport co-ordinators in schools come to the role with a range of knowledge, skills, and motivations. The role and job description of the sport co-ordinator may differ from school to school. Some sport co-ordinators have a solely administrative role, others have a leadership role, while others manage sizeable budgets and contracting obligations. Examples of role descriptions are found on the *New Zealand Secondary Schools Sports Council (NZSSSC) website*.

Pathways for sports coaches

171. Sport NZ supports National Sporting Organisations (NSO) to develop pathways for coaches. Sport NZ has resources for sport-specific coach development, see: *Sport NZ Coach Development Framework.*

172. Teachers, parents*, students, and club coaches who wish to develop their coaching skills should*, in the first instance, approach their sports coordinator who will have contacts with the Regional Sports Trust (RST) or their regional sporting organisation, to find out what coaching development opportunities are available in their selected sport, see: *Regional sports trusts directory*.

173. Sport NZ has resources available to support student coaches, Growing Coaches and Growing Leaders, see: *Growing Coaches overview*.

Qualification providers

174. Tertiary Education Organisations (industry training organisations, universities, polytechnics, and private training establishments) offer courses in EOTC, sports coaching, recreation management, outdoor leadership, outdoor education*, and adventure tourism. For contact details of training organisations, go to the New Zealand Qualifications Authority (NZQA) website.

Leader competence and field trips

175. Field trips are associated with a wide range of learning areas, including social studies, learning languages, geography, history, health and physical education, and biology. Such trips might take students to industrial or forestry sites; to urban or rural areas; to the bush, mountains, or the coast; or even overseas. The broad scope of field trips means that the activity leaders, who will usually be subject specialists, should also be competent to lead and teach students in the environments into which they venture. This may require the leaders to gain activity-specific outdoor training and/or qualifications (for example, bush skills and river-crossing skills).

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Clear roles and responsibilities

The team involved in planning and delivery of EOTC

176. All schools need to consider the learning intentions of the activity, the people they have around them to make it happen and who they need to bring in to run the activity safely. During the planning phase of an EOTC event*, clear roles and lines of responsibility should* be established for all the team members. Any allocated role or responsibility should be within the capability of the individual team member. It may be helpful to have this in writing (see appendix 4, sample forms 4 and 5).

177. The principal or delegate (Person in Charge) makes decisions, based on competence, about the team involved in an EOTC event. The team will usually include a Person in Charge (PIC), activity leaders and assistants. Full information on the roles and responsibilities of these groups can be found in chapter 2.

178. Schools use a range of people to run and support their EOTC activities*. The people involved may include teachers, provisionally registered teachers, support staff, contracted providers, parents*, whānau, community volunteers, and senior student leaders. Schools will therefore manage their activities differently (see research by Haddock, 2007a and b).

Contracted outdoor providers

179. If an outside provider is used the school should prepare a contract for the provider's services and clarify, in writing, the provider's roles and the respective responsibilities of the contractor and that of the school.

180. Schools have a responsibility to assess the quality of the providers used to support their programmes. A check should be made to ensure that providers are reputable and meet good practice standards.

181. The school should ask for evidence that the provider has current independent safety audit certification. If the activity is an adventure activity* the provider must* be a registered adventure activity operator.

(See paragraphs on Outdoor safety quality assurance further in this chapter).

182. The Health and Safety at Work (Adventure Activities) Regulations 2016 include a specific exclusion for clubs (or an association representing clubs) where they provide adventure activities to a person who is not a member.

183. WorkSafe New Zealand's position is that this exclusion only applies in circumstances where all of the following three conditions are met:

- The activity is only provided to a non-member for the purpose of encouraging enrolment or interest in the activities of the club.
- The activity is not provided for another purpose, such as a commercial purpose, even if the club consider this is a subsidiary purpose or a consequence of providing the activity.
- The activity is only offered on no more than 12 days in any 12 month period.

For example, if a local canoe club decided to host a free "have a go day" for the purpose of recruiting new members, the exclusion could apply.

If you have any questions about this exclusion, please contact WorkSafe New Zealand.

184. Measures to determine a provider's quality involve finding out whether the following information is available on request:

- a safety plan, externally audited and approved;
- evidence that all activity leaders have relevant and current skills and qualifications, first aid certificates, and appropriate driving licences;
- evidence that all activity leaders have relevant, logged, recent experience;
- referees' contact details (ensure that you contact them).

185. LEOTC* providers, who are contracted by the Ministry of Education, should be able to show that their EOTC management is consistent with these EOTC guidelines.

186. Even when an outside provider is contracted by the school to provide services, the board of trustees is still responsible for student safety. Therefore, a teacher involved in the event should be delegated to take this responsibility as the school based Person in Charge (PIC).

187. The school should have a mechanism in place that allows a staff member and a provider to resolve any disagreement between them. The following is a suggested inclusion for an agreement between the school and a provider.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

188. If there is a dispute between the provider and school staff regarding a decision before or during an activity, the more conservative option must* be followed (that is, the one that provides the highest standard of safety and care to students).

Appendix 4, sample forms 14, 15 and 16 provide a contracting checklist, a model of an agreement between a school and a provider, and a sample contract that can be used to support the contracting process.

189. In contracting or hiring instructors to support delivery of a programme or activity, schools should follow best practice, such as hiring to match the scope of the activity and ensuring the instructor holds a recognised New Zealand qualification that is current. Websites such as the New Zealand Register of Recreation Providers (*www.nzrrp.org.nz*) carries information about qualified and current leaders, instructors, guides and coaches across outdoor, fitness, aquatic activities and sport. You can also check what the qualification(s) they do hold allows them to do.

Outdoor safety quality assurance

190. When planning to use outdoor pursuits* or adventure activities* to achieve curriculum goals, the Person in Charge should* ensure that thorough risk management planning and sound operational procedures are in place. Whether the school is running the programme itself or is contracting an outside provider to do so, the Board of Trustees should be assured that the programme is safe and of high quality, and if an outside provider is used that the provider is legally compliant.

191. Only providers of defined 'adventure activities' are able to be registered on the WorkSafe NZ *Register of adventure operators*. There are many activities provided to schools that are not defined by the regulations as 'adventure activities' and therefore do not need to be on the register.

192. Adventure activity operators are audited under the regulations by recognised certification bodies. Each certification body will have its own mark or form of certification. Once certified, operators can be registered on the Worksafe NZ public register.

193. Schools that have an extensive outdoor education programme and are not subject to the adventure activities regulations should consider seeking an outdoor safety assessment from a certification body or similar audit provider.

Contractors assessing NCEA programmes

194. Where schools are using contractors to manage assessments, they must ensure they are meeting all New Zealand Qualifications Authority (NZQA) and Industry Training Organisation (ITO) requirements. Further information about sub-contracting arrangements between a school (the consent holder) and a non-consent holder can be found on the *NZQA website.* Schools can also consult with the ITO they are working with.

Provisionally certified teachers (PCT)

195. It is up to the school (principal and board) to decide whether they will allow a provisionally certified teacher (PCT) to be the Person in Charge or an activity leader for an EOTC event* or activity*. The Education Council New Zealand does not have a ruling on this. It is not a matter of whether it is legal for a PCT to lead an EOTC activity; the question is whether they have the relevant competence, skills, and experience for the particular activity. In most cases, it would be good practice for a PCT to be mentored on site by a registered teacher with relevant experiences.

Tertiary students

196. Many schools provide opportunities for tertiary students to practise and extend their teaching, coaching, and instructional skills. For example, university or polytechnic students who are studying teacher education, sports coaching, recreation management, or outdoor leadership may be on a practical experience placement in a school.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

197. Although these students are technically under the supervision of teachers during their placement at the school, many bring extensive experience and sometimes qualifications relevant to an EOTC event (for example, as a kapa haka leader, sports coach, or outdoor instructor). The principal or their delegate may decide to allow a tertiary student who meets good practice requirements to be an activity leader for an EOTC event. Others may be put in an assistant role.

In most cases, tertiary students should not be appointed the Person in Charge of an EOTC event.

Parents*, whānau, and community volunteers

198. Some EOTC events require extra supervisors to supplement the school staff and contracted personnel. This need creates an opportunity for family, whānau, and the community to get involved in the students' learning. The evidence about creating educationally powerful connections with family, whānau, and communities is compelling (Robinson et al., 2009). Such connections have the potential to make a real difference to students' learning outcomes.

199. Productive connections between the school, the home, and the community can bring wider resources to support students' learning and safety. However, just inviting volunteers along to "make up the numbers" will not necessarily achieve this. To add real value to students' learning outside the classroom, schools need to tap into the wealth of experiences, knowledge, and attitudes that parents*, whānau, and community volunteers can contribute. Incorporating local, traditional, and contemporary Māori knowledge can be particularly effective for Māori students' learning and for enhancing their identity.

200. Volunteers who support EOTC events* should* be carefully selected by the school. Ideally they should be well known to the school and the students and have relevant knowledge, experience, and skills to share, as well as proven supervisory skills. In most cases, schools should not plan to leave students in the sole charge of voluntary assistants.

Volunteers (as unpaid workers) are not required to be safety checked under the Vulnerable Children Act 2014 (VCA) or Police vetted under the Education Act 1989.

Volunteers may include educators, parent helpers (volunteering to go on school camps) club leaders and sports coaches.

The only unpaid workers who will need to be safety checked are those working in services or schools, as part of an educational or vocational training course e.g. student teachers on practicum.

Further information on the VCA can be found in the *VCA Practical Guide*.

201. For safety reasons, it is not advisable for activity leaders or volunteer assistants to bring extra children along to EOTC events. If adults do bring extra children to an EOTC event, the adults should not be included in the supervision team.

202. Early in the planning stage, the principal or delegate (Person in Charge) selects the volunteers and contractors who will be group leaders, activity leaders, assistants, coaches, or drivers. If there is any doubt about the suitability of an adult volunteer or a contractor, further investigations should be made. If doubt remains, that adult should not be approved to participate in the event.

203. Parents who support their children's schools by billeting children on school trips are volunteers and are therefore not required to be safety checked under the VCA or Police vetted under the Education Act 1989.

School boards have the primary duty to care for and manage risks to the health and safety of workers others (including students) arising from the work of the school. This means that schools must take reasonable steps to ensure that the accommodation the school is providing for their students and staff on schools trips, including in private homes (while under their care and responsibility) , is healthy and safe.

Student leaders

204. There are sound educational reasons for involving senior secondary students as EOTC activity* leaders and assistants in EOTC activities* for younger students. This is an excellent opportunity for them to develop their leadership skills and to strengthen vertical relationships between the different year groups within the school. Student leaders can supervise groups provided they have the appropriate skills, experience, and maturity for the activity, the group, and the environment.

205. Student leaders need to be adequately briefed and trained beforehand, and they need to be under the direction of a competent activity leader.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Effective supervision

Effective supervision

206. Effective supervision is a critical factor in the delivery of safe learning experiences. Staffing and supervision of any EOTC activity should be planned to ensure that any emergency situation can be dealt with effectively.

207. An effective supervision plan for a large group should allow for the Person in Charge to be free from directly supervising students, where possible, so that they can have an overview of the whole group. The supervision plan should still be effective if one or more of the activity leaders or assistants are removed to deal with an incident* or if they are taken ill or injured.

Ratios

208. A ratio compares the number of skilled and experienced supervisors to the number of learners or participants involved in an EOTC event. It is important that the selected ratio in a supervision plan ensures that both quality learning and safety are maximised. These guidelines do not prescribe ratios. Ratios for EOTC are hard to prescribe because they will vary according to the age and needs of the students, the nature of the activity, the location, and the competence of the students and staff involved. Competence is central to setting ratios and putting an effective supervision plan in place for any EOTC activity. An EOTC activity or event may have a combination of ratios (for example, a special needs student may draw a 1:1 ratio with a teacher aide. Very competent students may be in a group of 10 with a competent leader while another competent leader may have only 3 unskilled students).

209. When EOTC events are held in foreign or remote environments or involve hazardous activities, the supervision plan, including the ratio, should match the increased level of risk* involved.

210. Decisions on supervision plans should take into account, as part of the risk assessment:

- the competence of staff;
- the competence of volunteer assistants;
- the genders, ages, behaviour, and ability of the students;
- any special medical, educational, or capability needs of the students;
- the duration and nature of the activity (for example, land based, water based);
- the nature of the site;
- the site requirements (for example, permits);
- the contingency options;
- the level of first aid cover required for the activity;
- the access to emergency services;
- the season and the weather forecast.

211. If in doubt, be conservative and/or seek professional advice when deciding on an appropriate supervision plan, including ratios. A list of professional national bodies is found in appendix 3.

Examples of effective supervision structures

212. It is very important when deciding on an effective supervision plan to remember that not all adults have the experience and skills to be an activity leader or assistant. Here are some examples to illustrate how sound decisions can be made.

An afternoon trip to the local river swimming hole:

- one teacher;
- five parents, all can swim 200 metres competently;
- thirty-two year 7–8 students, thirty have consent to swim, twenty-seven students are capable of swimming 50–100 metres;

After considering all the factors in paragraph 210, this school decided on a ratio of 1:7 (one adult assistant to seven students) with the teacher (the activity leader) remaining free to supervise the overall group.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

213. A walk through the botanical gardens involving:

- one teacher;
- three parents with previous experience supervising students on local excursions;
- twenty-seven year 3 students.

After considering the factors in paragraph 210, this school decided on a ratio of 1:9 (one adult assistant to nine children) with the teacher (activity leader) remaining free to supervise the overall group. Note: All parents are counted as assistants in this activity.

A two-day, overnight, seven-a-side rugby tournament involving:

- one coach who is a teacher;
- one parent in the role of manager (this is her third overnight trip in three years as the manager – she helps throughout the year in various roles in the school's sports programme);
- eleven year 11 and 12 students.

After considering the factors in paragraph 210, this school decided on a ratio of 2:11 (two activity leaders to eleven students). In their decision making, the school considered it acceptable that should the manager have to take a student to hospital, the coach would manage the remaining ten students. The sport co-ordinator (SC) had turned down another parent's offer to manage the team when it became apparent that she intended taking her toddler on the trip. In addition, the SC had said no to a request from the manager to visit family friends while on the trip.

Note: If roles and responsibilities are not clarified, it is easy for activity leaders and assistants to be deflected from their role. The 24-hour nature of multi-day trips adds to the requirements of the supervision role, and schools are encouraged to be conservative in their decision making.

"There is more freedom to give students more choices outside. Everything relaxes ... you have a better relationship with them."

Teacher

General supervision guidelines

214. All activity leaders and assistants should*:

- be fully briefed on the activity and related safety procedures;
- be assigned to a specific group of students (where possible);
- have an opportunity to get to know their group early on;
- carry a list of the names of all students in their group, with emergency contact details and other relevant student information, such as special and health needs or behavioural problems;
- be aware of students who require closer supervision;
- involve students in the safety procedures;
- set up buddy or team support structures;
- if at all possible, ensure that adults are not left alone with a student for the student's safety and the adults reputation;
- do regular headcounts of students during all types of EOTC event*.

Alcohol

215. There is no place for alcohol or non-prescription drugs at a school EOTC event. Responsibility for supervision extends into recreation times and overnight for some EOTC events. Alcohol and non-prescription drugs impair a person's ability to provide a high level of supervision and to respond to an emergency.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Determining staffing and supervision

216. Determining the staffing and supervision required for safe and effective EOTC events* can be challenging for schools. They have the flexibility to do this in a number of different ways, depending on the size of the school and the extent of its EOTC programme*. Whichever way they choose, schools need:

- an inventory of EOTC events over the year, identifying the competence required to run each activity safely;
- a register of the staff's existing relevant competencies;
- a comparison document that identifies any gaps between the existing and the required competencies of the staff.

EOTC event inventory and staff competence register

217. Schools are encouraged to document the EOTC events* and activities* planned for the calendar year, along with associated staffing and supervision requirements.

218. It is also a good idea to keep a register of staff qualifications, skills, and experience relevant to EOTC. For example, a spreadsheet could show those staff who hold a current first aid certificate, bus licence, or activity-specific qualification and those who have completed risk management training or qualifications. This may be part of the school's general register of staff qualifications and experience. This information is vital for EOTC planning as well as being useful for prioritising professional development planning within the school. Some student management systems have a Staff Manager section that may be useful for storing such information, or the sample form 3 in appendix 4 could also be used for this purpose.

Identifying and addressing the gaps

219. The school needs to compare the information collected in the EOTC event inventory with the staff competence register in order to identify any gaps in the staff competence to run their EOTC programmes*. Once any gaps are identified, the school has several options.

Short term, the school could:

- adjust the activity to fit within the existing staff competence;
- seek voluntary or contracted expertise for the activity.

Long term, the school could:

- encourage and support staff as they gain the relevant experience, training, and qualifications for the activities they plan to lead;
- employ staff with the desired competence as vacancies arise.

"With the art gallery trip, my daughter now tells me that black is not a shade and white is a tint. She uses all these new words now and teaches us about them too."

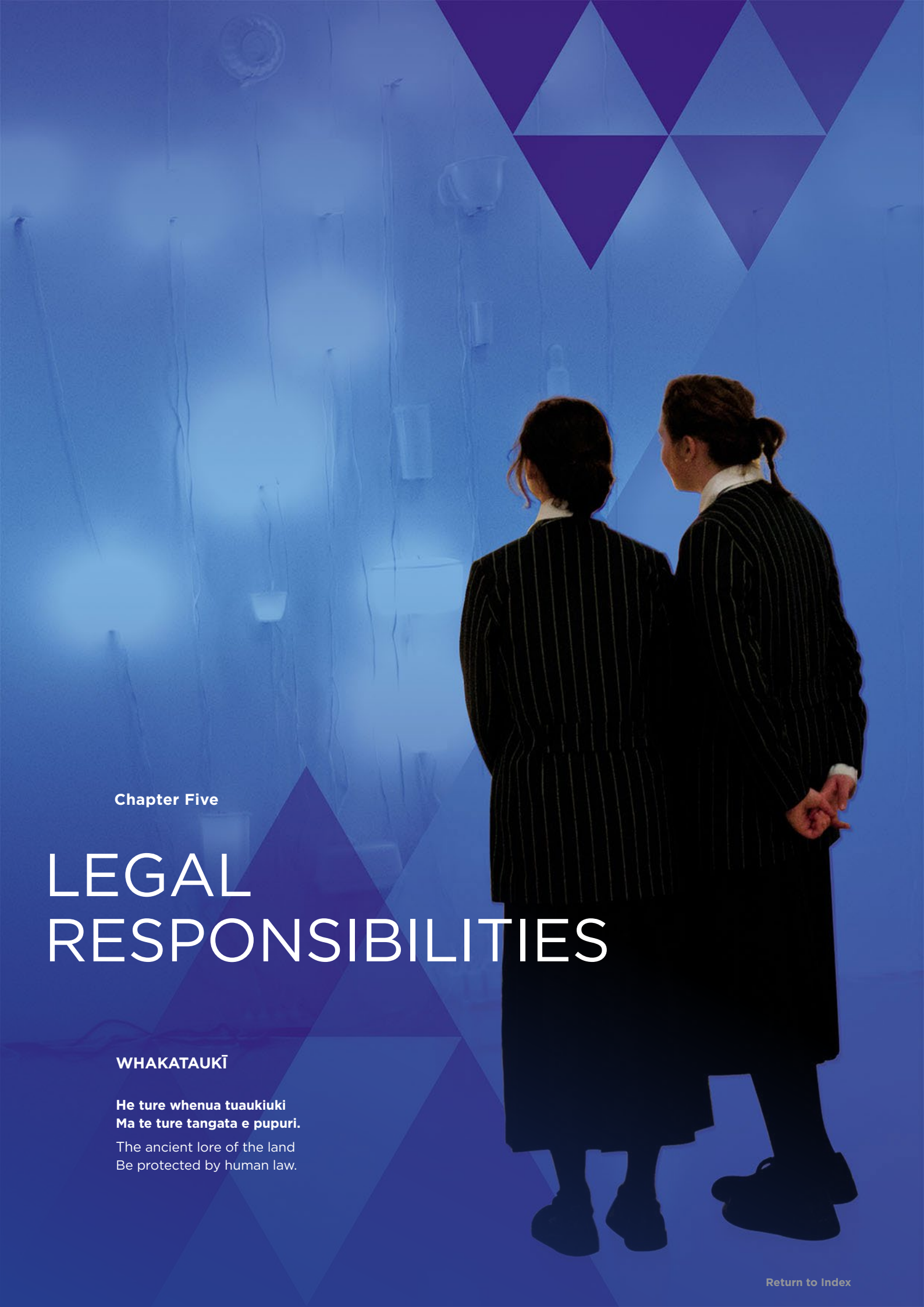
Parent

Operation Zones Model

220. The operation zones model is a useful tool to help activity leaders understand the importance of identifying their own and the participant's competence in relation to the difficulty of an activity. It can also help activity leaders to work out the appropriate ratio of competent leaders to novices for an EOTC activity. While this model was originally designed as a tool for adventure activities*, it can be applied in many other contexts, for example, in sport or in a stage challenge.

For more information about the operation zones model, please go to *http://eotc.tki.org.nz/Media/Files/The-Operational-Zone*

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines



Chapter Five

LEGAL RESPONSIBILITIES

WHAKATAUKĪ

He ture whenua tuaukiuki
Ma te ture tangata e pupuri.

The ancient lore of the land
Be protected by human law.

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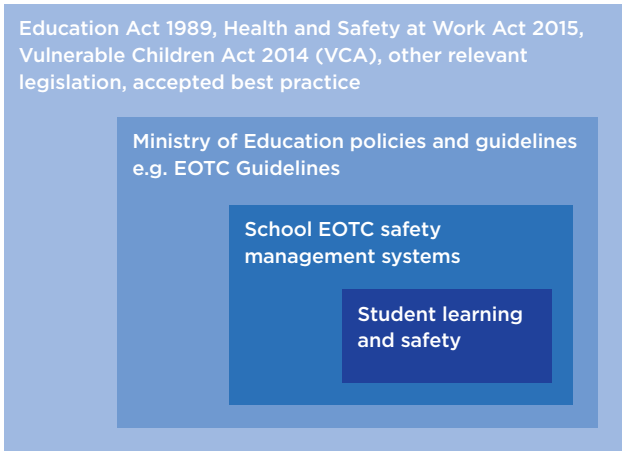
Legal and policy framework

221. Schools operate in an environment of statutory requirements and Ministry of Education policies and guidelines. This is illustrated in figure 5.1 below.

Figure 5.1
The Legal and Policy Environment for Student Learning and Safety



222. The outer layer of figure 5.1 shows the statutory requirements that schools need to meet. Some of the most important statutory obligations applicable to schools in relation to their EOTC programmes* are those under the Education Act 1989 and the Health and Safety at Work Act 2015 and associated regulations. These and other requirements are detailed later in this chapter. Schools also need to follow relevant codes of practice and good practice* standards in any EOTC activities* they are responsible for.

223. The second layer of figure 5.1 shows that schools need to follow Ministry of Education policies and guidelines. These include the national curriculum, which sets the direction for learning, and the EOTC Guidelines: Bringing the Curriculum Alive (2016). This set of guidelines supports the national curriculum and is consistent with statutory requirements and good practice standards.

224. The third layer of figure 5.1 shows that schools need to follow the safety management policies and systems that they have developed themselves to maximise student learning and safety. Statutory requirements and Ministry of Education policies and guidelines must* underpin these.

225. Central to the entire framework shown in figure 5.1 is student learning and safety.

Governance responsibilities

226. Boards of trustees must ensure student safety during EOTC events* in order to meet their statutory obligations under the Education Act 1989, the Health and Safety at Work Act 2015 and associated regulations, and any other legislation in force that relate to the safety of students, staff, and others.

227. While school boards have overall legal responsibility to provide a safe physical and emotional environment for students (National Administration Guideline 5), they do not always have direct control over school-related activities or activities advertised through the school. Where school management and staff take on active responsibility, they must exercise this responsibility with due care and within board policy. When an outside provider is contracted by the board, it is still expected that the board will retain overall responsibility and accountability and plan accordingly. Where an optional community-based activity is advertised through the school, but a group outside the school is responsible for it, this should* be clearly communicated to the school community to avoid any misunderstandings.

228. Occasionally, boards and their staff may take partial responsibility for a joint community and school activity. It is important to remember that the board and staff are still expected to ensure that good practice standards are being met by all involved. They should also communicate to students and families the extent to which school staff are involved. Boards must also realise that optional activities, such as some sports trips, need to be run according to the good practice of similar curriculum-based activities.

229. For the benefit of school communities, boards should make it clear to all interested parties that community groups that advertise through the school are following best practice guidelines. For example, if a local kayak club advertises through the school newsletter, the school community may assume that the board has at least asked for confirmation that this club is aware of and follows good practice guidelines for kayaking.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Accountability and liability

230. The board of trustees, which includes the principal, is responsible for the safety of all students and others involved in EOTC programmes.

231. If there is an incident* during an EOTC event, a board may be held accountable whether the incident is caused by the actions or omissions of a teacher, volunteer assistant, student, or provider contracted by the board.

232. If there is a failure to carry out due diligence; or to develop and follow policies and procedures which keep students, staff, and volunteers safe during the event; then the board, and/or its officers (e.g. principal), and/or its workers may be liable to prosecution.

233. Whether such accountability will mean that the board is legally liable for the incident will depend on whether the board has complied with its legal obligations when the school was planning and implementing the EOTC activity. Where the board, staff, and volunteers plan well and follow good practice guidelines, the possibility of legal liability, if anything goes wrong, will be greatly diminished.

234. Under the Health and Safety at Work Act 2015, the board (collectively) is a Person Controlling a Business or Undertaking (PCBU) and could be liable for relevant offences. However, while volunteer workers do have the same duties as paid workers, they cannot be charged with all the same offences. In effect, individual volunteers on the board of trustees are exempt from fines relating to a failure to meet the officer's due diligence obligations. The principal is a paid officer of the school who does not have the same statutory immunity as elected or appointed board members and may be held liable as an individual officer.

235. Criminal liability is unlikely to arise in all but the rarest situation. A person's actions would need to differ greatly from those of a reasonable and competent person faced with those same circumstances, before criminal liability was considered.

Legislation

Legal obligations arising from legislation

236. A board's legal obligations include those set out in legislation and those arising from common law. To ensure the safety of students, and employees, boards are required to comply fully with any legislation in force. The legal responsibilities of boards are set out below.

Education Act 1989

237. Section 60A of the Education Act 1989 defines the National Education Guidelines, which have four components:

- National Education Goals (NEGs);
- foundation curriculum policy statements;
- national curriculum statements;
- National Administration Guidelines (NAGs).

238. The National Education Goals (NEGs) are given effect by the Education Act 1989, which requires every school to have a charter. The purpose of the charter is to establish the mission, aims, objectives, directions, and targets of the board, which will give effect to the NEGs and the board's priorities, some of which will have relevance for EOTC.

239. The National Administration Guidelines (NAGs) set out statements of desirable codes or principles of conduct or administration for each school's board. Some of these will have relevance for EOTC.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Health and Safety at Work Act 2015 legislation

240. The board of trustees under the *Health and Safety at Work Act 2015* is a Person Conducting Business or Undertaking *(PCBU)*. A PCBU is in the best position to control risks to health and safety of students, staff and parent volunteers in an EOTC event. This is why the PCBU has the primary duty for the health and safety of staff, students, and volunteers participating in the event.

241. As a PCBU, The Board's specific obligations are (so far as is reasonably practicable):

- providing and maintaining a work environment, plant and systems of work that are without risks to health and safety;
- ensuring the safe use, handling and storage of plant, structures and substances;
- providing adequate facilities at work for the welfare of workers, including ensuring access to those facilities;
- providing information, training, instruction or supervision necessary to protect workers and others from risks to their health and safety; and
- monitoring the health of workers and the conditions at the workplace for the purpose of preventing illness or injury.

242. In the case of EOTC events the result of carrying out these duties should ensure that:

- risks are managed to prevent serious harm during EOTC events;.
- equipment is safe to use during the event;
- students are supervised by competent staff; and
- emergency procedures need to be planned and followed.

243. Under the Health and Safety at Work Act 2015, the primary duty of care is the responsibility of the board of trustee as a legal entity. The duty to exercise due diligence rests with the individual members of the board of trustees, including the principal, Exercising due diligence in this situation involves checking carefully to make sure the school is doing all that it reasonably can and should do, to ensure the health and safety of staff and students and others. Further information is available from WorkSafe NZ's *Introduction to the Health and Safety atWork Act 2015*.

Key sections of the Health and Safety at Work Act 2015

- *Meaning of PCBU, section 17*
- *Meaning of Officer, section 18*
- *Meaning of reasonably practicable, in relation to a duty of a PCBU: section 22*
- *Management of risks: section 30*
- *Duty of officers, section 44*
- *Liability of volunteers, section 51*

Vulnerable Children Act 2014

244. The Vulnerable Children Act 2014 (VCA) requires specified organisations to safety check children's workers they employ or engage.

245. A Specified organisation includes an individual or organisation that is funded (whether wholly or partly, and whether directly or indirectly) by a State service to provide a regulated service(s) and includes organisations providing services to education providers (including trade academies, service academies, alternative education providers, attendance services, school bus services, and Education Outside the Classroom providers).

246. A children's worker works in, or provides a regulated service and their work involves regular or overnight contact with a child or children (other than children who are co-workers). The work must take place without a parent or guardian of the child, or of each child, being present.

247. As a specified organisation a school will need to consider whether it employs or engages any children's workers. Further information to help you work through these questions can be found here: *Children's worker safety checking under the Vulnerable Children Act 2014*.

248. Please note EOTC providers are specified organisations and have direct responsibilities under the VCA 2014. Schools may seek assurance that any EOTC provider workers have been and/or will be safety checked to the VCA standard within the timeframes set out in the VCA before services are engaged.

249. Parents attending a school camp are volunteering in a school. Volunteers (as unpaid workers) are not required to be safety checked under the VCA 2014 requirements. There is also no requirement to police vet volunteers under the Education Act 1989.

250. While it is not a legal requirement for school to carry out a screening or vetting process on volunteers, it is recommended as best practice schools to take all opportunities to put good safety checking processes in place to keep children safe.

Crimes Act 1961

251. This Act imposes a duty on those with responsibility for others, including boards of trustees and teachers, to provide the necessaries of life, including food, clothing, and medical treatment. A further duty is imposed on "those in charge of dangerous things" (which would include certain EOTC activities) to use all reasonable care to avoid danger to human life.

Other legislation

252. There are many other practical and legal responsibilities that may be relevant to an EOTC event*, such as those that relate to employment, food safety, transport, *Children's worker safety checking under the Vulnerable Children Act 2014* and privacy. If you are unsure about your responsibilities, contact a relevant agency and seek professional advice.

General law

Legal obligations under general law

253. This section explains the scope of a New Zealand school board of trustees' duty of care and the standard of care required and explores how the board's responsibility relates to parental responsibility (including the legal efficacy of parental consent forms).

Duty of care

254. School boards of trustees, and teachers, owe a duty of care to students to safeguard them from harm in situations where a reasonable person would have foreseen the likelihood of harm arising. This responsibility continues even when school activities are located away from the school and involve activity leaders and assistants from outside the school and when students participate in courses offered by contracted providers.

255. Accident compensation legislation currently means that people cannot sue a board for any breach of this duty that results in personal injury. But boards can still be sued for negligence, exemplary damages, compensation for property damage, or damages for mental injury.

Standard of care

256. Boards are required to meet particular standards in order to fulfil their legal obligations. For example:

- the Health and Safety at Work Act 2015 requires boards to take "reasonably practicable steps*";
- the Crimes Act 1961 refers to a standard of care that would be expected of a reasonable person;
- there are reasonable standards of care owed to students in cases where negligence is alleged.

257. The standard of care required during an EOTC activity* is the standard that could be reasonably expected of a competent person in the activity, for example, a coach, a teacher, or an outdoor leader.

258. To meet the required standards of care, boards should*:

- establish an EOTC policy and procedures that are based on and reflect current good practice*;
- ensure that the EOTC programme* operates in accordance with the board's own policies and procedures and is in the best interest of the students; and
- carry out proactive due diligence in relation to health and safety.

Breach of standard of care

259. Putting aside the issue of accident compensation, in order for an injured student to succeed in a claim of gross negligence against a school, the student or their parent* would need to establish that:

- the school owed a duty of care to that student;
- the school was in breach of that duty;
- as a result of the school's breach of its duty, the student suffered damage or harm;
- the damage or harm suffered was not too remote from the school's breach of its duty.

"In loco parentis" – an obsolete concept

260. There is often reference to the "rule of in loco parentis" in descriptions of the standard of care that is owed to students participating in EOTC (Hay-MacKenzie, 2001; Rishworth, 2001).

261. This "rule" supposedly requires that boards and their staff provide the degree of care towards their students that could be expected from a reasonably careful and prudent parent.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

262. It would appear that in loco parentis is legally obsolete in its application to our state school system. This concept is no longer accepted as satisfactory in jurisdictions comparable to New Zealand's because a school's authority has been granted by parliament rather than by individual parents or under private arrangements made by parents with the school.

263. To say that schools act in place of parents is a useful metaphor for how schools should act, but it is inaccurate to say that schools derive their power from parents. This situation is unaltered when students are away from school on overnight school trips or camps. Some supervisory functions will be more like those of parents, in this setting, but they will still be derived from authority granted by the state.

"All the procedures are there for us to follow, so we know what to do and what is expected of us."

Teacher

264. There would be few circumstances where the standard of care required for an EOTC event*, inside or outside the school environment, would be actually equivalent to that of a reasonably careful and prudent parent. Whether a teacher is taking students on a tramp for outdoor education* or a scout leader is taking young people on a tramp in the weekend, they in fact need to meet relevant, current, good practice standards, such as holding an outdoor leader or bush award or be able to demonstrate equivalency*.

265. The fact that the doctrine of in loco parentis still continues to be invoked appears to be due to social factors, which perpetuate its psychological importance rather than giving it legal standing.

Waivers

266. A signed waiver does not release the organisation, individual staff, or any person from their legal responsibilities for the prevention of harm. A high standard of care is still owed, quality equipment is required, activities need to be supervised by competent staff, and emergency procedures need to be planned and followed. The standard expected may also change according to the circumstances and students' abilities. For example, when it is known that students have special needs, what is considered reasonable will be different.

267. Rather than using a waiver, schools are recommended to use parental consent* and risk* disclosure procedures. See chapter 3, paragraphs 134-153 and appendix 4, sample form 9.

268. Obtaining a valid informed consent may require more than a sentence or two about generic risk acceptance. Schools should* provide specific information to parents and caregivers about the risks inherent in the planned EOTC event, to enable them to adequately understand what they are consenting to. This may require schools to use a range of media resources and to manage any language or communication issues.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Chapter Six

CODES OF PRACTICE

WHAKATAUKĪ

Ka tika te rapaunga whakaaro
Ka tika ko te whakaharatau.

Getting the philosophy right will ensure informed practice.

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Relevant standards

269. To meet statutory health and safety requirements, organisations must* be able to demonstrate that their practices are consistent with professional standards of safety. Such standards are contained in codes of practice or statements of preferred work practices.

270. Where codes of practice are not available, good practice* becomes the standard. Information about good practice is usually available through formal and informal sources. Formal sources of good practice include activity guidelines and manuals. Informal sources include the procedures and practices that organisations use to run an activity, which may or may not be documented as part of their standard operating procedures.

271. Schools should* be able to show that EOTC activities* comply with the relevant code of practice or, in its absence, with good practice standards for that activity.

272. While the Health and Safety at Work Act 2015 is primarily concerned with the health and safety of employees, boards of trustees are also responsible for the health and safety of the many other people who are involved in school activities, including students, visitors, parents*, contractors, and volunteers.

Personal protective equipment

273. Under the Health and Safety at Work Act 2015 (HSWA) a PCBU (such as a Board of Trustee) has a primary duty of care to its workers and others involved in its activities. Under this duty of care, the PCBU must ensure, so far as reasonably practicable, the health and safety of its workers and that other persons are not put at risk from its activities.

274. Duty to workers relating to PPE. The PCBU must ensure that any PPE is:

- selected to minimise risks to health and safety;
- suitable, having regard to the nature of the work and any hazard associated with the work;
- a suitable size and fit and reasonably comfortable for the worker who is to wear or use it.

275. Duties to others relating to PPE. The PCBU must ensure, so far as reasonably practicable, that

- PPE to be worn by any person other than a worker is capable of minimising risks to that person's health and safety;
- The person wears or uses the equipment.

276. To fulfil the primary duty of care under the legislation, boards must ensure, so far as is reasonably practicable, that:

- all circumstances and activities to which the use of personal protective equipment is appropriate are identified and made known to persons undertaking that activity;
- protective clothing, footwear and equipment is provided for anyone requiring protection against any risk* or danger to their health;
- all protective clothing and equipment supplied is sufficient to give adequate protection from an identified risk it is designed to minimise; and that it complies with any relevant New Zealand standard or code of practice and is adequately maintained;
- adequate instruction is given in the use and maintenance of such protective clothing and equipment;
- all individuals required to wear protective clothing, footwear and equipment do so as often as the circumstances for which they are provided arise;
- any adjustment, adaptation, cleaning, repairing or maintenance to any protective clothing does not reduce the standard or quality of protection for which the protective clothing was designed, manufactured, or provided.

Specific duties relating to PPE are found in the *General Health and Safety at Work (General Risk and Workplace Management) Regulations 2016* at: *Personal Protective Equipment*.

Swimming pool policy

277. If you have your own school pool, you must make sure everyone who is using it with your permission remains healthy and safe. This includes school community members who use the pool after school and in the holidays with your permission.

For more information about swimming pools, please visit: *Ministry of Education – Swimming Pools* and *Water Safety NZ School Guidelines*).

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Agency and Industry codes of practice

278. From time to time, codes of practice are developed by various agencies and industry bodies. These codes of practice are intended to limit the likelihood and consequences of serious harm to people. Examples of codes include:

- the rafting code of practice – Maritime Rules Part 81 – Commercial Rafting Operations Maritime New Zealand;
- Occupational diving operations – AS/NZS2299 series standards;
- A site-specific codes of practice for the ropes (ropes-course builders usually develop this site-specific codes). These are often based on international standards and become the standard operating procedures for the users of that particular facility.

"If you never actually get to see the real thing, then you can't understand it so well."

Year 6 student

Formal sources of good practice

279. In the absence of an industry code of practice, good practice* guidelines become the standard for an activity. From time to time, national organisations agree on a range of acceptable practices used to run an activity safely and document these in guidelines.

280. Activity Safety Guidelines (ASG) have been developed for a number of outdoor activities. They can be accessed through *Support Adventure* ASG's are considered reputable guidance. When relevant ASG's are available it is strongly recommended to implement them.

281. Another publication containing good practice* guidelines for outdoor activities is *Outdoor Activities – Guidelines for Leaders* (Sport New Zealand). These guidelines are for outdoor leaders including teachers, and may also be useful for governors and managers of and participants in outdoor programmes. This publication contains guidelines for forty-two different outdoor activities.

282. Appendix 2 contains a list of resources, including guidelines and manuals that summarise good practice for various activities relevant to EOTC.

283. Good practice evolves, so it is important that a school's management systems ensure its policies, procedures and training are all kept up to date. What was accepted practice in the past may not be acceptable today or in the future.

The National EOTC Coordinator Database

284. Registration of a school's designated EOTC coordinator into the National EOTC Coordinator database is good practice. Registration ensures the EOTC coordinator will receive direct support for their role, including any need-to-know information such as changes to best practice, new health and safety information and outdoor sector updates. Inclusion of a reminder to check and update EOTC coordinator details as part of annual EOTC review serves to keep the school's registration current. Go to Education Outdoors New Zealand at *www.eonz.org.nz* for the link to the database registration page.

285. Other sources of good practice information are located at: *Support Adventure Other Sources of Good Practice Information*.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Informal sources of good practice

286. If there are no formal guidelines documented for a particular activity, schools should* establish that their practices are consistent with those of their professional peers who also run that activity.

287. When trying to establish good practice* for an activity that does not have a written manual or guidelines, the following options are available to schools.

- Contact one or two schools that run the same activity and find out what their current practices and procedures are for running the activity.
- Contact a related organisation that runs the activity, for example, a recreation centre or youth organisation, and find out what their current practices and procedures are for running the activity.
- Consider collaborating with these groups to document your agreed practices and procedures for the activity.

288. If the school receives variable or conflicting advice from different sources, it would be prudent to follow the advice that provides the highest standard of care for students.

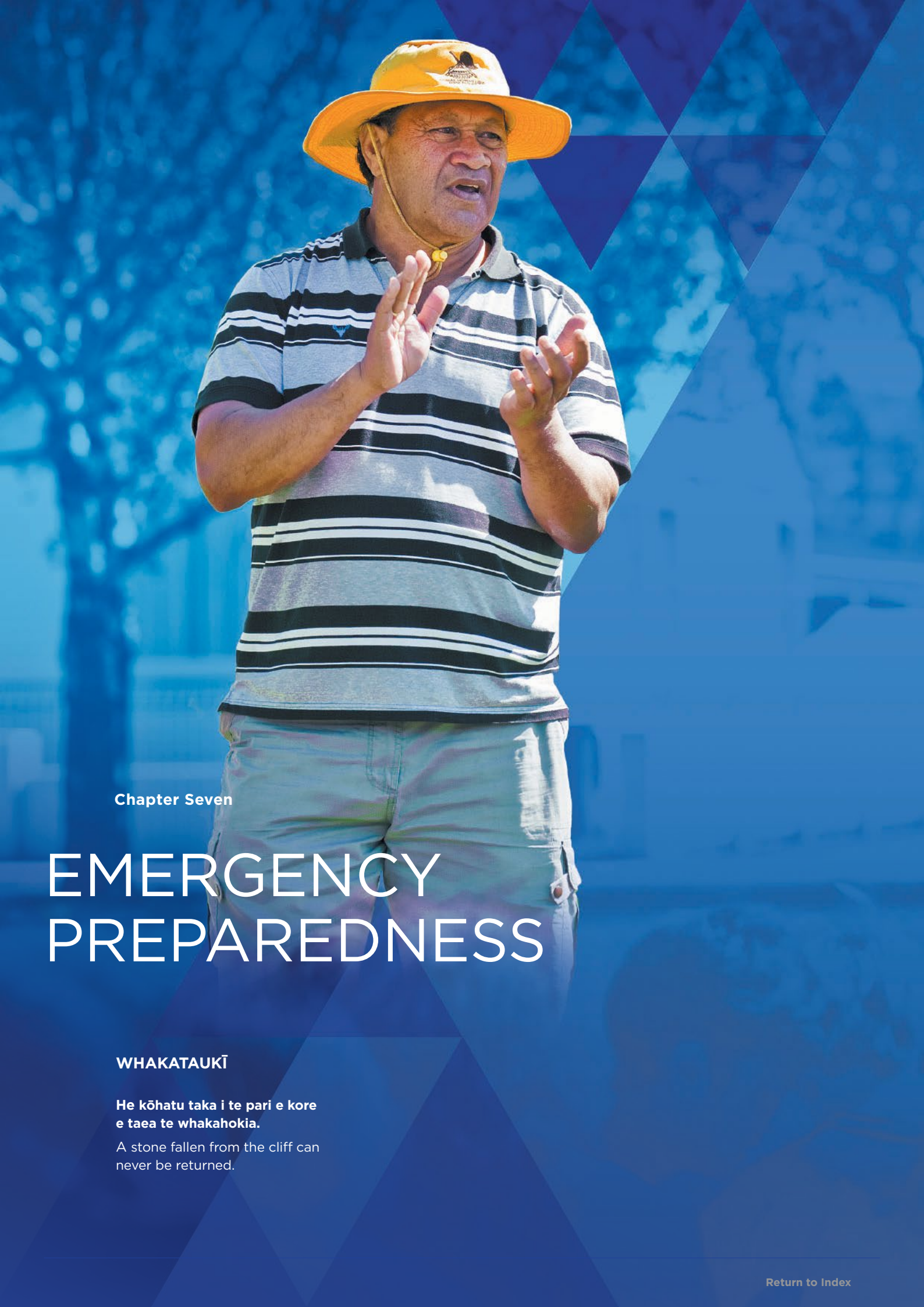
Determining whether good practice standards are met

289. Accessing the relevant code of practice or good practice standards for an outdoor activity is relatively easy when you know where to look. The more difficult task is to determine whether your school, or an outdoor provider you wish to engage, actually meets these standards. Sample form 6 in appendix 4 can assist with this task. See also chapter 4, which provides guidance on judging the quality of an outside provider.

"You have kids who shine when they're outdoors who don't do that in the classroom ... you can see these kids coming out of nowhere to be leaders."

Teacher

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines



Chapter Seven

EMERGENCY PREPAREDNESS

WHAKATAUKĪ

He kōhatu taka i te pari e kore e taea te whakahokia.

A stone fallen from the cliff can never be returned.

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Planning for emergencies

290. There are various ways in which schools can prepare themselves for responding to an emergency situation or a traumatic incident where the well-being of students, staff or parents is affected. Schools will find the Ministry of Education's *Managing Student And Staff Wellbeing – A Guide For School Incident Management Teams (2016)* helpful.

291. Schools' legal responsibilities are set out in the Health and Safety at Work Act 2015. While the Act is primarily concerned with the health and safety of employees, boards of trustees are also responsible for the health and safety of the many other people who come onto school grounds, including students, visitors, and parents* and contractors. This responsibility should* be reflected within the school's emergency planning.

292. It is a requirement under the Health and Safety at Work Act 2015 for a PCBU to ensure that it has appropriate processes for receiving and considering information regarding incidents, hazards, and risks and for responding in a timely way to that information. This means that school boards of trustees should take reasonably practicable steps* to:

- ensure an effective risk/hazard management process is in place and being used;
- ensure an incident reporting, recording system is in place and used to review individual incidents as well as to analyse trends or patterns across the data;
- ensure that risk and incident reviews and analysis (from the school and from wider sector groups) are used to inform planning for emergencies;
- develop procedures for dealing with emergencies that may arise during an EOTC event;
- ensure that students, staff and volunteers have the opportunity to be fully informed of the procedures developed for the purpose of dealing with or reacting to emergencies or imminent dangers during an EOTC event.

293. A place of work is defined by the Health and Safety at Work Act 2015 Act as:

a) a place where work is being carried out, or is customarily carried out, for a business or undertaking; and

b) includes any place where a worker goes, or is likely to be, while at work and place includes a vehicle, vessel, aircraft, ship or other mobile structures and any water and any installation on land, on the bed of any water or floating on any waters.

294. A teacher's place of work, therefore, is where they happen to be working, including on and off-site locations for EOTC activities*. This would include in the school grounds, at a museum, on a bus, in or by a river, and at a school camp or sports venue.

295. Schools can prepare themselves for responding to an emergency during an EOTC event* by having robust planning in place to deal with significant, foreseeable risks* and by utilising appropriately trained and qualified personnel.

Emergency plans should* include:

- specific crisis management plans for each identified risk associated with an EOTC activity*;
- incident* recording, reporting, and analysis procedures;
- a school-wide traumatic incident* response plan (TIRP) that includes a communications plan (internal and external) and a media plan and spokesperson.

Incident

296. An incident is an event where there was, or might have been, harm (physical and emotional) to people, damage to property, or interruption to process. Incidents include any event where intervention was required, for example:

- the suddent accidental or non-accidental death or serious injury of a child, young person, staff member or volunteers;
- witnessing serious injury or death of a child, young person, staff member or volunteers;
- threats to safety of students or staff, including the presence of an individual behaving in a threatening manner;
- physical or sexual abuse;
- theft or vandalism;
- a lost or missing student, staff members; or a volunteer.

"We acknowledge that sport is so good for teaching those transferable skills."

Teacher

Crisis management plan

297. In the first instance, a crisis management plan should be written for each identified risk* (potential loss) as part of the risk management planning process for an EOTC activity*. A safety management template or similar form (see appendix 4, sample form 2) can be used for this. A crisis management plan sets out, step by step, how to manage each potential emergency or incident and what resources and equipment are required. This plan should be consistent with the school's traumatic incident response plan (TIRP).

298. Another approach is to have a set of generic crisis management or contingency plans, which are referred to on the safety management template or similar form.

Traumatic incident response plan

299. Schools are expected to have a policy about all major issues and this includes traumatic incidents. A traumatic incident in a school community, which includes an EOTC activity, can be a stressful experience and, as it is usually sudden and unexpected, a planned response with procedural steps to follow can do much to lessen the impact and accelerate recovery. The procedures after an emergency or any other situation where the well-being of individuals is affected should focus mostly on the recovery of people and what needs to be considered to establish systems and clear procedures to best support children, young people, teachers and other adults in the school community in the aftermath of a traumatic event. The goal is to aid recovery and to reduce the longer term potential for further harm.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

300. A TIRP would include (at least):

- a planned procedure to follow to minimise further risk (physical and emotional) after an EOTC incident where students, staff and or parents have been affected should at least include a list of who to contact in the event of an incident, for example, police, principal, BOT chair, kaumatua, Ministry of Education;
- a protocol for steps to take immediately following a death or serious incident (ensure safety of all others, manage triage – including appropriate care of injured and/or storage of the bodies of those who have died, preserve the scene – leave all equipment as is, photograph the scene);
- a media plan including a designated spokesperson (usually the Principal or BOT chairperson);
- systems that support school continuity and the return to regular routines and structures;
- systems to identify and support children, young people and staff who are vulnerable;
- systems that will provide immediate crisis intervention such as having easy access to;
  - factual, accurate, timely information about the event or incident;
  - opportunities to clarify and understand information about the event;
  - age and culturally appropriate activities to support this understanding;
  - information on psychological needs and mental health issues;
  - information on coping strategies;
  - resources for assistance if needed;
  - connecting with others.

For more information consider the Traumatic Incidents: *Managing Student And Staff Wellbeing – A Guide For School Incident Management Teams (2016)*.

Traumatic Incident response support

301. Schools can access support when an incident has occurred by contacting their Education Director based in the *Ministry regional office* or their *local special education office* where the traumatic incident teams are based or through calling 0800 TI TEAM (0800 848 326).

Communications plan

302. Schools should have a communications plan in place for EOTC events. Relevant parts of the plan should be incorporated into the school's TIRP and should include communication:

- within the school (board of trustees, staff, students, parents*);
- between the school and the location of the EOTC event*;
- within the field (if groups are operating independently for periods of time);
- with emergency services;
- with the media.

303. The means of communication should be appropriate for the purpose and may include, but are not limited to, landline or mobile telephone, fax, mountain radio, VHF radio, personal locator beacon, computer-based communications (email or Voice over Internet Protocol), pencil and paper, and signalling devices such as a whistle or mirror.

"When we were doing low ropes, I twirled around and I hit my leg on the platform and then fell on my back, which really hurt."

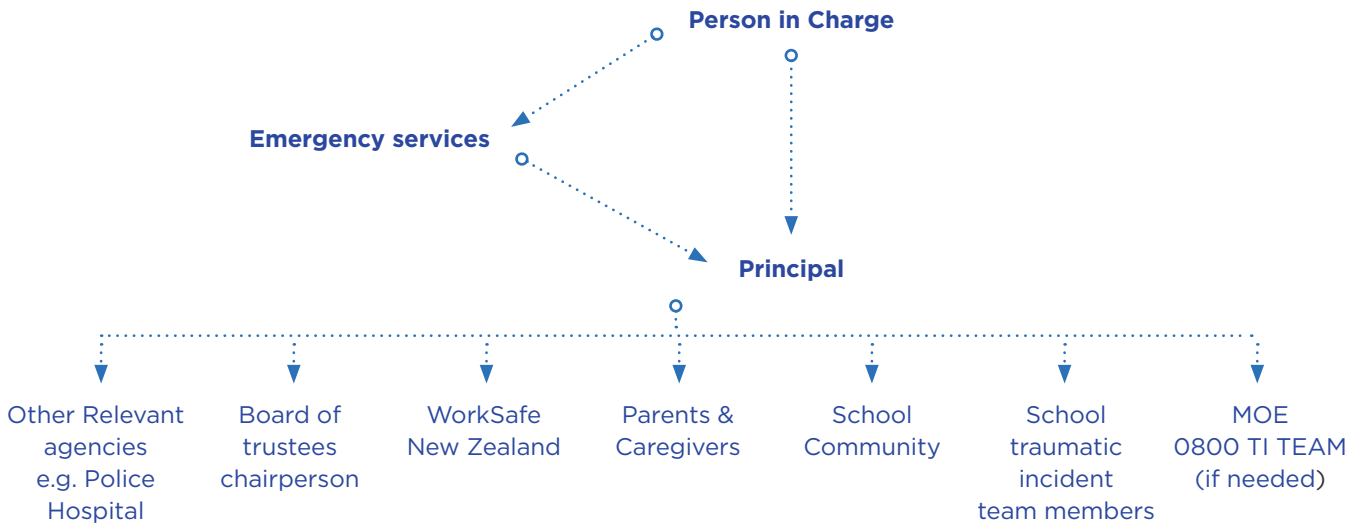
Secondary student

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Communication tree

304. In the event of an incident, the initial communication tree should* resemble the following, with the arrows representing lines of communication:

Figure 7.1
Communication Tree



Media management plan

305. A school's TIRP should include a media management plan. Boards need to appoint a dedicated person to deal with questions from the media if there is a serious injury or death. This would usually be the principal and/or the board chair. All other staff and board members must understand that they should not make any comment to a member of the media and must instead direct journalists to the dedicated media liaison. Only the appointed spokesperson should speak to the media.

306. It is also important for staff and students not to post comments about the incident on social media as these may be used by journalists looking for quotes.

307. When planning for the media, it's recommended that you:

- appoint a media spokesperson (usually the BOT chairperson or Principal) to take responsibility for all communication with the media;
- recognise the right of the media to ask questions. Recognise that they will be trying to find a story;
- develop a written media statement (should be developed by the school's Incident Management Team and checked for sensitivity and accuracy).They may not be needed but best to be prepared;
- be prepared for TV media interest in a high impact event. Camera crew and reporters can be asked to leave school property but they may remain outside the gates and may ask parents or students questions. Students in particular can be vulnerable to this so giving them information on how to behave if confronted by media can be helpful;
- be prepared for media interviews after major events and designate a place that could serve as media interview site, ensuring it is away from children, young people and teachers (off-site is preferable).

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Advice for media Spokesperson

308. A protocol needs to be put in place for dealing with media. When a journalist gets in touch make it clear that either the designated media spokesperson will call them back about the specific information they are requesting. In the meantime find out:

- who is calling;
- what organisation they represent;
- their contact details;
- the nature of their inquiry;
- what sort of interview they want if they are wanting an interview, i.e. a radio or television interview that is pre-recorded or live;
- if the journalist has specific questions they would like answered.

309. When an interview is agreed to, it is recommended that the questions that will be asked are sent prior to the interview so responses can be prepared and only those questions responded to:

- Use the interview or media statement to:
  - Discuss positive steps taken to address the incident and try to get the media to support the response by reporting where concerned people can go for further support;
  - Emphasise the primary goal of the school is to help children, young people, teachers and families/whānau to get through the situation and get back to normal as quickly as possible;
  - Do not give assurances that may later prove to be unwarranted such as: 'Everything is under control'.
- It is important that the media spokesperson takes control of the situation by responding when he or she is prepared rather than being caught off guard.
  - Say only those things you are confident of saying and are factual and avoid getting into discussion or speculation.
  - Take your time and if you don't know, say so.
  - When interviews are over the spokesperson should avoid entering into general discussion or give 'off the record' statement – there is no such thing.
- Inform bereaved family and whānau of any statements prior to release to media and inform them if the school's spokesperson will be interviewed, by whom and when.
- Ensure all staff are briefed on all aspects of media involvement.
- The system for the front desk person to respond to phone calls/visits from media should ensure that rather than the call being put through to the spokesperson immediately, or seeing if he/she is available to meet the spokesperson, the caller is informed that the spokesperson will contact them as soon as possible.
- It can be helpful to prepare a script for the front desk person to adhere to as well as one for the spokesperson because some questions from media personnel can catch people off guard and 'trick' them into giving information they shouldn't.
- A log to record the names and contact numbers of journalists and their organisations should be organised, and a record of all media statements made by the school and news clippings kept.
- In high level interest events schools might consider contracting a specialist in communications and media liaison advice.

310. It is useful for anyone on the staff who is likely to field a call from the media to keep a small card with the bullet points from paragraph 309 close at hand.

311. Interview checklist:

Do run through with the journalist beforehand what they want to ask.

Do stick to what you know.

Do remember to use key messages.

Do treat it like a conversation and try to relax.

Do use plain language and avoid slang, jargon and acronyms.

Don't be afraid to show emotion if the interview is about a serious injury or death.

Don't make personal comments.

Don't criticise other people or organisations.

Don't speculate by being drawn into answering 'what if' questions.

Don't say "No comment." If you don't know the answer, say so.

Don't give long answers, keep them short and simple.

Don't focus on the camera or microphone. Engage with the journalist.

Incident recording, reporting, and analysis

312. Section 57 of the Health and Safety at Work Act 2015 requires boards of trustees (as a PCBU) to keep a record of each notifiable event* for at least 5 years from the date on which notice of the event is given to the regulator (WorkSafe NZ) under Section 56 of this Act.

313. Relevant sections from of the Health and Safety at Work Act 2015:

Requirement to keep records section 57

Meaning of notifiable injury or illness section 23

314. Schools boards are required to:

a) maintain a register of notifiable injury or illness, incident or event, shall record in the register the prescribed particulars relating to:

- every incident that harmed (or as the case may be, might have harmed) any person during an EOTC event.
- every occurrence of serious harm to employees at work site as a result of a hazard the employee was exposed to while at work in the employment of the board.
- notify the regulator of the event as soon as possible after becoming aware that a notifiable event arising out of the conduct of the business or undertaking has occurred.

315. A notification may be given by telephone or in writing (including by email, or other electronic means); and must be given by the fastest possible means in the circumstances.

316. A person giving notice by telephone must give the details of the incident requested by the regulator; and if required by the regulator, give a written notice of the incident within 48 hours of being informed of the requirement.

317. A written serious harm notification can be submitted online at *WorkSafe NZ*.

Relevant sections of the Health and Safety at Work Act 2015

Meaning of notifiable injury or illness section 23

Meaning of notifiable incident section 24

Meaning of notifiable event section 25

Duty to preserve sites

318. A PCBU who manages or controls a workplace at which a notifiable event has occurred must take all reasonable steps to ensure that the site where the event occurred is not disturbed until authorised by an inspector.

319. This duty does not prevent any action:

a) to assist an injured person; or

b) to remove a deceased person; or

c) that is essential to make the site safe or to minimise the risk of a further notifiable event; or

d) that is done by, or under the direction of, a constable acting in execution of his or her duties; or

e) for which an inspector or the regulator has given permission.

Incident analysis and review procedure

320. Schools must* analyse individual incidents* to discover underlying causes and to determine whether the situation was caused by or arose from a significant hazard*. A useful mechanism to achieve this is an incident review procedure. The results of such a review may be used to improve safety in that particular school and/or schools in general. A school safety committee composed of the EOTC co-ordinator, principal, and suitable safety or outdoor expert/s could carry out this review. However, for serious incidents, it may be desirable to have an external review.

321. Schools should* periodically carry out analysis across their collated incident data. This analysis is to consider whether any trends or patterns are identifiable that may indicate changes in safety performance over time, systemic issues, or clusters of incidents in particular areas of the schools work.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Statutory investigations

322. In the case of notifiable injury or illness, incident or event during an EOTC event*, schools should expect there to be a statutory investigation. Statutory authorities that have the responsibility to carry out an investigation include the police, the office of the coroner, WorkSafe NZ, Maritime New Zealand, and the New Zealand Transport Agency. In some cases, more than one authority may conduct investigations, for example, the police on behalf of the coroner together with WorkSafe NZ.

323. If a statutory authority is conducting an investigation into an EOTC notifiable injury or illness, incident or event, schools should expect to be interviewed and to provide information for the investigation.

First aid

324. Boards must ensure that persons injured at school or in any school-related activity have ready access to a qualified first aider and adequate first aid supplies. Each first aid treatment must also be recorded in a register.

First aid treatment register

325. Boards must ensure that a register of accidents is kept that records:

a) the nature of every first aid treatment given in the school;

b) the date on which it was given;

c) the name of the person that received first aid treatment;

d) the nature of the injury or illness for which first aid was administered;

e) the date, time, and place the incident occurred;

f) the cause of the incident;

g) any other relevant circumstances leading to, during, and after the incident;

h) whether the injured person was referred to a doctor or nurse;

i) the name of the person that administered first aid treatment.

326. Most student management systems are capable of maintaining a first aid treatment register.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Qualified first aiders

327. There is no requirement to have a specific number of qualified first aiders in a workplace or to have a specific type of first aid certificate. However, all students must* have access to a qualified first aider. Boards of trustees need to decide how best to achieve this. For example, a school may arrange for the Red Cross to attend an inter-school sports day. However, for a school camp with five groups of ten students doing different outdoor activities in different locations each day, each activity leader or an assistant would need to have a first aid certificate, preferably one relevant to outdoor activities.

First aid supplies

328. WorkSafe NZ has guidance relevant to a school board's planning and decision makng processes (see *First Aid for Workplaces – A Good Practice Guide*)

329. Suggested first aid kit contents lists that are tailored for an outdoor and group context can be found at *Support Adventure First Aid Resources*.

330. Boards must ensure that:

a) mobile first aid kits are available to be taken on every EOTC event (The number, location, and contents of mobile kits should meet the needs of the specific EOTC event);

b) first aid supplies are kept clean and tidy and accessible for the treatment of injured persons (the kits should be made of suitable material to protect contents from damp and dust and should be clearly identified as first aid kits);

c) first aid supplies are available to be given without delay to anyone requiring them during EOTC event;

d) all school staff are aware of the location of first aid supplies.

331. There is no mandatory list of items that should be included in a first aid kit. Boards should ensure that any decisions that are made on what to include in the first aid kit come from information gathered during the assessment of an EOTC event's first aid needs.

332. Where particular hazards exist in an EOTC location, the mobile kit should contain additional contents. For example, in a high-wasp area, an anaphylaxis kit may be included. S

333. It is essential that first aid equipment is checked regularly. Boards should ensure that first aid kits are replenished as soon as possible after use to ensure that there is always an adequate supply of materials available. It is essential that items be replaced before the expiry date shown on their packets.

Person in Charge of first aid

334. Boards must ensure that an appropriately trained or experienced person has responsibility for all first aid supplies during EOTC events.

That person may need to:

- Ensure that a mobile first aid kit is available for all groups going out on their own; and
- Check if an Automated External Defibrilator (AED) is available onsite (whether at your school or other venue e.g. residential camp site, sports venue) and ensure staff and students, depending on their maturity and age, are informed about where it is located and when and how to use it appropriately.

335. For EOTC, that person or their delegate may need to be available beyond school hours, especially during residential events. The Person in Charge should also keep a list of staff and others with current first aid certificates and ensure that these people are deployed appropriately during an EOTC event. Some student management systems have a Staff Manager section, where it may be useful to record whether a staff member holds a current first aid certificate.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

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GLOSSARY

Terms have the following meanings for the purposes of these guidelines.

Good practice

In the absence of a formal standard or code of practice, good practice becomes the standard for an activity. Usually, national organisations agree on a range of acceptable practices to run an activity safely and document these practices in guidelines. Good practice evolves, so keeping up to date is important.

If there are no formal, documented guidelines, schools should establish that their practices are consistent with those of their professional peers in the field. If there is disagreement on the best practice/s to use, then the practice/s that provide/s the highest standard of care for students should be the one/s followed.

Other publications may use the terms "current, accepted practice" or "best practice" to describe good practice.

Adventure activities

Adventure activities create challenge and excitement by deliberately exposing participants to elements of risk. Their purpose is to enhance participants' self-concept and improve their social skills. The risks could be physical (for example, injury), social and/or emotional, or material (for example, damage to gear or equipment). In an educational setting, activities are usually promoted that have a greater degree of learner-perceived risk but a lower degree of residual risk (see the definitions of "risk" in this glossary). Both natural and constructed environments can be used for such activities. Adventure education can enable participants to exceed their previously perceived limits, so adventure education is a powerful medium for promoting personal growth and development (Priest, 1990).

The Adventure Activities Regulations define the type of adventure activities to which they apply.

A summary guide to interpreting this regulation is available at *WorkSafe NZ*.

Adventure-based learning (ABL)

Adventure-based learning (ABL) is a subset of adventure activities as described above. ABL activities are commonly sequenced to include co-operative games, trust-building activities, and problem-solving and decision-making activities, and the challenges can include low- and high- ropes courses. Debriefing and reflection based on the activities encourage and develop participants' skills in communication, trust, goal setting, leadership, and taking responsibility. Participation fosters students' personal and social development (Ministry of Education, 1999).

Challenge by choice

Challenge by choice means the participant chooses their own level of challenge within a supportive peer environment.

Education for sustainability (EfS)

Education for sustainability (EfS) fosters the capacity of people to be informed and active participants in society moving towards ecological, social, cultural, and economic sustainability. The key goals of sustainability are to live within our environmental limits, to achieve social justice, and to foster economic and social progress while developing a quality of life for all. EfS was formerly known as environmental education. See: *TKI Environmental Sustainability*

EOTC programme, event, activity, experience

An EOTC programme is a programme of EOTC activities that extends over a term or year and involves a class or classes.

An EOTC event is an event that involves multiple groups and activities, such as a sports tournament, stage challenge, or outdoor education camp.

An EOTC activity is a single activity, such as a museum visit or a rocky shore or geography field trip.

An EOTC experience is a single experience in any of the above categories.

Equivalency

Equivalency means an alternative to a qualification, which indicates that an outdoor leader meets the requirements listed in the relevant qualification's syllabus. Organisations should be able to justify

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

the equivalency decisions they make, including the documentation that they have considered in making their decisions. Outdoor leaders may indicate equivalency by one or more of the following:

- attestation from an independent assessor-level expert;
- referees' statements;
- record of recent experience meeting the qualification requirements;
- a training record;
- an incident record;
- other relevant qualifications (including similar overseas qualifications);
- observation;
- a field check;
- appraisals conducted by an assessor-level expert.

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.

Learning experiences outside the classroom (LEOTC)

LEOTC is a Ministry of Education curriculum support project. It contributes (through contestable funding) towards curriculum-linked programmes for school students, run by a range of organisations, such as zoos, museums, historic parks, art galleries, performing arts centres, and science centres. See: *www.leotc.tki.org.nz*

Must

In this document, "must" is used in reference to a non-negotiable policy that has to be followed. Such policies are based on statutory requirements.

Notifiable events

In the Health and Safety at Work Act 2015, unless the context otherwise requires, a notifiable event means any of the following events that arise from work:

a) the death of a person; or

b) a notifiable injury or illness (see 'serious harm' below); or

c) a notifiable incident.

Notifiable incidents

In the Health and Safety at Work Act 2015, unless the context otherwise requires, a notifiable incident means an unplanned or uncontrolled incident in relation to a workplace that exposes a worker or any other person to a serious risk to that person's health or safety arising from an immediate or imminent exposure to:

a) an escape, a spillage, or a leakage of a substance; or

b) an implosion, explosion, or fire; or

c) an escape of gas or steam; or

d) an escape of a pressurised substance; or

e) an electric shock; or

f) the fall or release from a height of any plant, substance, or thing; or

g) the collapse, overturning, failure, or malfunction of, or damage to, any plant that is required to be authorised for use in accordance with regulations; or

h) the collapse or partial collapse of a structure; or

i) the collapse or failure of an excavation or any shoring supporting an excavation; or

j) the inrush of water, mud, or gas in workings in an underground excavation or tunnel; or

k) the interruption of the main system of ventilation in an underground excavation or tunnel; or

l) a collision between 2 vessels, a vessel capsize, or the inrush of water into a vessel; or

m) any other incident declared by regulations to be a notifiable incident for the purposes of this section.

Notifiable injury or illness

In the Health and Safety at Work Act 2015, unless the context otherwise requires, a notifiable injury or illness, in relation to a person, means:

a) any of the following injuries or illnesses that require the person to have immediate treatment (other than first aid):

   i) the amputation of any part of his or her body;

   ii) a serious head injury;

   iii) a serious eye injury;

   iv) a serious burn;

   v) the separation of his or her skin from an underlying tissue (such as degloving or scalping);

   vi) a spinal injury;

   vii) the loss of a bodily function;

   viii) serious lacerations.

b) an injury or illness that requires, or would usually require, the person to be admitted to a hospital for immediate treatment;

c) an injury or illness that requires, or would usually require, the person to have medical treatment within 48 hours of exposure to a substance;

d) any serious infection (including occupational zoonoses) to which the carrying out of work is a significant contributing factor, including any infection that is attributable to carrying out work:

   i) with micro-organisms; or

   ii) that involves providing treatment or care to a person; or

   iii) that involves contact with human blood or bodily substances; or

   iv) that involves handling or contact with animals, animal hides, animal skins, animal wool or hair, animal carcasses, or animal waste products; or

   v) that involves handling or contact with fish or marine mammals:

e) any other injury or illness declared by regulations to be a notifiable injury or illness for the purposes of this section.

Outdoor education

Outdoor education is one of seven key areas of learning in the health and physical education learning area of the national curriculum. It focuses on particular aspects of outdoor learning, such as adventure activities, outdoor pursuits, and relevant aspects of education for sustainability (Boyes, 2000). See the definitions for these terms in this glossary.

Outdoor pursuits

Outdoor pursuits are activities that involve moving across natural land and/or water environments by non-mechanised means, for example, biking, orienteering, tramping, rock climbing, cross-country skiing, kayaking, sailing, rafting, and caving (Blanchard and Ford, 1985; Boyes, 2000; Lynch, 1993; Ministry of Education, 1999; Priest, 1990).

Parent

In these guidelines, the term "parent" means father, mother, guardian, or immediate caregiver.

Parental consent

Parental consent is permission given for a student to attend an EOTC event or activity (see the definition for these terms in the glossary) after parents have been provided with sufficient information to understand the EOTC event or activity.

Person Conducting a Business or Undertaking (PCBU)

The Health and Safety at Work Act 2015 defines a PCBU as

a) means a person conducting a business or undertaking:

   i) whether the person conducts a business or undertaking alone or with others; and

   ii) whether or not the business or undertaking is conducted for profit or gain; but

b) does not include:

   i) a person to the extent that the person is employed or engaged solely as a worker in, or as an officer of, the business or undertaking;

   ii) a volunteer association;

   iii) an occupier of a home to the extent that the occupier employs or engages another person solely to do residential work;

   iv) a statutory officer to the extent that the officer is a worker in, or an officer of, the business or undertaking;

   v) a person, or class of persons, that is declared by regulations not to be a PCBU for the purposes of this Act or any provision of this Act.* Section 17.

Personal protective equipment

Under the Health and Safety at Work Act 2015, personal protective equipment means anything used or worn by a person (including clothing) to minimise risks to the person's health and safety and it includes air-supplied respiratory equipment.

Place of work

A place (whether or not within or forming part of a building or structure) where any person is to work, is working, for the time being works, or customarily works, for gain or reward; and, in relation to an employee, includes a place, or part of a place, under the control of the employer (not being domestic accommodation provided for the employee):

a) where the employee comes or may come to eat, rest, or get first aid or pay;

b) where the employee comes or may come as part of the employee's duties to report in or out, get instructions, or deliver goods or vehicles;

c) through which the employee may or must pass to reach a place of work.

Psychological first aid

Providing psychological first aid means promoting an environment of safety, calm, connectedness, self-efficacy, empowerment, and hope for people after a traumatic incident (see the definition for these terms in the glossary).

Psychological first aid assists people who may be having reactions of confusion, fear, hopelessness, sleeplessness, anxiety, grief, shock, guilt, shame, and loss of confidence in themselves and others.

RAMS

Risk analysis management system (a risk management planning tool). Reasonably practicable

Reasonably practicable

Under the Health and Safety at Work Act 2015, reasonably practicable, in simple terms, means taking all the steps that are reasonably possible in practice to achieve a result. The Health and Safety at Work Act 2015 states:

Unless the context otherwise requires, reasonably practicable, in relation to a duty of a PCBU set out in subpart 2 of Part 2, means that which is, or was, at a particular time, reasonably able to be done in relation to ensuring health and safety, taking into account and weighing up all relevant matters, including:

a) the likelihood of the hazard or the risk concerned occurring; and

b) the degree of harm that might result from the hazard or risk; and

c) what the person concerned knows, or ought reasonably to know, about;

   i the hazard or risk; and

   ii ways of eliminating or minimising the risk; and

d) the availability and suitability of ways to eliminate or minimise the risk; and

e) after assessing the extent of the risk and the available ways of eliminating or minimising the risk, the cost associated with available ways of eliminating or minimising the risk, including whether the cost is grossly disproportionate to the risk.

To avoid doubt, a person required by this Act to take reasonably practicable steps must do so only in regard to circumstances that the person knows or ought to know about.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

Remote supervision

Students doing an activity independently without direct supervision (e.g. bush navigation) where the activity leader is not with the group but in a known location and in these circumstances, students must be briefed on how to access help if required.

Risk

There are three possible levels of risk (Haddock, 2004) that activity leaders should be aware of:

Absolute risk – the uppermost limit of risk inherent in a situation that has no safety controls present; in other words, the worst that could happen, for example, a fatality.

Residual risk – the amount of risk present when the absolute risk has been adjusted by safety controls.

Perceived risk – an individual's subjective assessment of the residual risk present at any time. This usually differs from person to person, and perceptions can range from absolute risk at one end of a continuum to no risk at all at the other end.

SAP

Safety action plan (a risk management planning tool).

Serious harm

The Health and Safety at Work Act 2015 replaces the term 'serious harm' with the concept of 'notifiable injury or illness'.

In the Act, unless the context otherwise requires, a notifiable injury or illness, in relation to a person, means:

a) any of the following injuries or illnesses that require the person to have immediate treatment (other than first aid);
   - i) the amputation of any part of his or her body;
   - ii) a serious head injury;
   - iii) a serious eye injury;
   - iv) a serious burn;
   - v) the separation of his or her skin from an underlying tissue (such as degloving or scalping);
   - vi) a spinal injury;
   - vii) the loss of a bodily function;
   - viii) serious lacerations;

b) an injury or illness that requires, or would usually require, the person to be admitted to a hospital for immediate treatment;

c) an injury or illness that requires, or would usually require, the person to have medical treatment within 48 hours of exposure to a substance;

d) any serious infection (including occupational zoonoses) to which the carrying out of work is a significant contributing factor, including any infection that is attributable to carrying out work;
   - i) with micro-organisms; or
   - ii) that involves providing treatment or care to a person; or
   - iii) that involves contact with human blood or bodily substances; or
   - iv) that involves handling or contact with animals, animal hides, animal skins, animal wool or hair, animal carcasses, or animal waste products; or
   - v) that involves handling or contact with fish or marine mammals:

e) any other injury or illness declared by regulations to be a notifiable injury or illness for the purposes of this section.

Should

In this document, "should" is used in reference to a guideline that is strongly recommended and is to be followed if at all possible. This is based on good practice in the relevant activity. Activity leaders should have clear justification for operating outside guidelines.

Significant hazard

A significant hazard is a hazard that is an actual or potential cause or source of:

- serious harm;
- harm (being harm that is more than trivial): the severity of the effects on any person depend entirely (or among other things) on the extent or frequency of the person's exposure to the hazard;
- harm that does not usually occur, or is not usually detectable, until a significant time has elapsed after exposure to the hazard.

Traumatic incident

A traumatic incident is an event that:

- cause sudden and/or significant disruption to the operation, or effective operation, of a school and their community;
- have the potential to affect a large number of students and staff;
- create significant dangers or risks to the physical and emotional wellbeing of children, young people and people within a community;
- attract media attention or a public profile for the school as a result of these incidents.

Examples of traumatic incidents include:

- the sudden accidental or non-accidental death or serious injury of a child, young person, staff member or family/whānau member;
- witnessing serious injury or death of a child, young person, staff member or family/whānau member;
- threats to the safety of students or staff, including the presence of an individual behaving in a threatening manner;
- physical or sexual abuse that impinges on the school;
- theft or vandalism
- a lost or missing child, young person or staff member;
- floods, fires, earthquakes and other community crises or natural disasters.

* See the Glossary on pages 71-76 for clarification of how this term is used within these guidelines

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