

# GPG

GOOD PRACTICE GUIDELINES

# GENERAL



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**ADVENTURE  
INDUSTRY  
ASSOCIATION**

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## Introduction

Who these guidelines are for:

Good practice Guidelines (GPGs) are designed to help people plan organized outdoor activities for others. Adventure-based Experiential Learning facilities, youth organisations, recreational clubs, schools, outdoor centres, commercial adventure operators and any other relevant users can use these guidelines.

These guidelines have been written for people who may be part time or volunteer outdoor leaders, educators, or instructors. An example would be a part time volunteer leader who has some experience and training in an activity who does not hold a formal outdoor qualification.

Why the guidelines were written:

The GPG's are specifically designed to address common outdoor activities that are not currently covered by the Adventure Activity Regulations (or the associated Activity Safety Guidelines (ASGs)).

How the guidelines were organised:

This document provides **general good practice guidance** and should be read alongside the relevant **Activity Good Practice Guideline**. The general guidance highlights considerations for ALL activities whereas the activity guidelines highlight considerations SPECIFIC to the activity addressed. BOTH specific and general guidance should be referred to when planning an activity.

The Activity Good Practice Guidelines are split into two parts: one which summarises things to consider about that activity and one which is a template for you to use when planning your activity.

## How to use the Good Practice Guidelines

1. Read **this document** and the **relevant Good Practice Guideline** for your activity / ISO Standards.
2. Consider your organisation's **safety management system, policies, procedures**, and any other relevant guidance.
3. Use the **relevant Good Practice Guideline Planning Template** to write your own plan.

Edit the template to suit your specific situation (activity, location, participants, and leaders). This might include removing hazards that are not relevant for your activity.

Follow the template through section-by-section and attempt to answer each of the points that are prompted by the template.

The template has the following sections:

- a. Value of the activity – what do we hope to achieve
- b. General hazard analysis
- c. Site specific hazard analysis
- d. Leadership and Supervision plan
- e. Emergency communication plan
- f. Participant details/register
- g. Site/area map
- h. Resources and equipment
- i. Post trip review

## Potential value of activity

*A level of risk is inherent in all outdoor activities and the level of risk associated with an activity should be balanced with the potential value of the activity.*

### OUTDOOR ACTIVITIES CAN PROVIDE:

- A chance to explore new areas and experience new activities,
- Excitement, fun, and a sense of mystery and adventure,
- Health benefits of physical activity in the outdoors,
- An opportunity to learn and practice new skills,
- Social interaction,
- Development of resilience in the face of challenge or adversity,
- Opportunities for taking care and responsibility,
- An opportunity to be part of a team working on shared challenge,
- Environmental experiences (clean air, sounds, starts, being in or on water),
- Freedom from media, cellphones, and other digital devices or find new ways to engage with technology.

## Planning Considerations

*Guidance on: Pre- and post-event planning and working with external providers.*

### Pre-Event:

#### IMPORTANT PROCESSES TO COMPLETE PRIOR TO THE ACTIVITY INCLUDE:

- Activity plan including risk assessment (see **GPG Planning Template**)
- Consider a site visit to ensure you know where everything is and how it works
- Ensure all equipment is fit for purpose
- Intentions are left with someone who knows who is with you, where you are going, and what time you will be back
- Check your organisation's overarching safety management system (policies and procedures) to ensure you are meeting any expectations they have

### Risk Assessment and Management:

THIS COMPONENT INCLUDES CONSIDERATION OF THE FOLLOWING QUESTIONS:

- What could go badly wrong?
- Why could it happen? (What is the hazard?)
- How severe is the potential outcome? (What is the risk rating?)
- What controls should be put in place to eliminate and/or minimize the risk?

For guidance see: **The Overarching Risk Management Guidance** document.

#### **Post-Event:**

IMPORTANT PROCESSES TO COMPLETE AFTER AN EVENT INCLUDE:

- Reviewing the event with recommendations for next time
- Any new hazards or changes to the location / site
- Any incidents that need reporting

#### **Working with an External Provider:**

When you contract an external provider a service or resources (for example, the venue, equipment, staff, or a specific activity) there is potential for gaps, overlaps, or uncertainty regarding safety responsibilities.

YOU WILL NEED TO:

- Check, and be confident in, their safety management capability
- Ensure that there is clarity regarding who is doing what.

CHECKING AN EXTERNAL PROVIDER:

- Establish if they are registered tour guides with the department of Tourism (if the activity requires them to be either a nature guide, cultural guide, or adventure guide). If they are registered as an adventure guide, establish whether they are legally allowed to act within their scope. If Nature Guide, establish what level and that their scope of practice matches the activity.
- Establish if they are registered with a specific professional body or association if required by that specific activity and law.
- If they are not required to be registered with a professional body. *Have they had a comparable external safety audit in the last 3 years?* Ask to see the audit certificate, letter, or report.
- If they haven't been audited, you should ask to see their safety management plan and copies of:
  - Appropriate risk management documentation
  - Staff competency and experience records
  - Recent incident reports
  - Their emergency preparedness documents
  - Any recent safety reports.

CLARIFYING WHO DOES WHAT:

- Use some form of agreement or contract to clarify who is responsible for implementing and supervising each health and safety requirement



- Provide them with appropriate information regarding the event / activity, risk they may be exposed to, relevant emergency procedures, participant, and staff health information
- Consider any hire equipment, venue use, transportation and / or other services in these discussions.

ONCE THE EXTERNAL PROVIDER IS ENGAGED YOU MUST CONTINUE TO:

- Consult – about shared risks and how they will be controlled
- Cooperate – the organisation that is closer to the work is likely to have more direct control and influence over the risk and should be supported accordingly
- Coordinate – to ensure that either organisation’s safety efforts aren’t duplicated, or gaps aren’t left. For example, *who is providing and checking the safety equipment? Who is supervising the participants ‘after hours’ or during ‘free time’?*
- Monitor the external provider’s efforts to ensure they are doing what has been agreed to
- Reserve the right to halt any event conducted by external provider for safety or other reasons.

## Participants

*Guidance on: How to ensure the activities match the participants’ abilities and needs.*

### CONSIDERATIONS:

#### 1. Self-selection

If you let potential participants (and/or their guardians) know about the activity they are signing up for and its potential risks, then they can decide whether they want to participate or not. This can be achieved by using an acknowledgement of risk form. It must note the specific risks so that students and parents are making informed consent – but bear in mind that it may not make much sense to someone who knows little about the activity. Consider creating videos or photos to illustrate the activity for participants (and/or their guardians).

#### 2. Identifying participant abilities and characteristics

Including:

- Ages?
- Gender and sexuality diversity?
- Language/ability to follow your instructions safely?
- Behavioural characteristics – compliant, non-compliant, mixed?
  - Are participants (and their caregivers, if relevant) reliable and able to remember and follow basic safety instructions (e.g., what to do in the event of an emergency, site hazard information)?
  - Are any participants likely to show dangerous non-compliant behaviour (e.g., drugs/alcohol abuse, physical violence, ‘hooking up’ if underage, wandering away from the site)?

- Religious or cultural expectations (e.g., single sex bathrooms, bathing, food restrictions, prayer times, head wear)
- What are your participants' expectations around separating genders or gender identities (LGBTIQA+) in sleeping area and bathroom area?
- Fitness level
- Aquatic competency
- Experience with the activity
- Don't forget to assess the experience or capacity of any guardians or helpers who might be participating.

### 3. Sequencing activities to match the participants' characteristics and needs

Sequencing is about setting challenges and choosing activities at an appropriate level for each participant. It involves progressively building on a participant's knowledge and skills.

### 4. Clarifying participant health information

- What medical issues do the participants have that could affect their safe participation? E.g., Allergies.
- Are there issues that are made worse by the stress of participating in the activity? E.g., lack of sleep, fatigue, change in routine? How are these issues best managed?
- Are participants or their guardians sufficiently reliable to provide this information? Or do you need, for example, an allergy management plan or Individual Education Plan or a doctor's medical certificate?
- What medications or additional resources (other than supervision) do participants need to take part safely? E.g., prescriptions, physical aids, helpers.
- Don't forget to consider the health needs of any guardians, helpers, or supervisors.

**Note for providers** – you can get health information directly from participants using your own health declaration form or a client organisation might present this information to you in a summary form, but this needs to be **accurate** and **relevant**. Client organisations must let you know about relevant health or behavioural concerns that might affect the safety of your operation if they know them. However, you should always ask for this information rather than assume that the organisation will pass it onto you.

## Supervision

*Guidance on: The level and style of supervision typically required for this activity.*

There is no one 'ratio' of skilled and experienced leaders to participants for any given activity. Supervision needs vary according to age and ability of the participants (including fitness, health, or other needs), the activity involved, the environment conditions, and the competence of leaders and assistants.

## HOWEVER, THERE ARE SOME CORE PRINCIPLES TO HELP YOU DETERMINE THE APPROPRIATE STRUCTURE:

- For a competent and motivated group of young adults or adults who have good access to emergency communication and have demonstrated they are compliant to safety rules, reliable and able to look after themselves, a single leader may be appropriate. In this case you need to be confident in the participants' abilities to manage emergency situations if the single leader is incapacitated or busy/distracted.
- When there is more than one supervisor, clearly defined roles and responsibilities should be delegated. This is particularly important when using assistant leaders, accompanying teachers (who are not the activity leader), student leaders or parent helpers.
- Plan with everyone's needs in mind. Supervision needs will change if participants have any special needs, behavioural or health needs.
- An effective supervision structure for a large group should allow for the person in charge to be free from directly leading participants so they can have an overview of the whole group.
- The number of leaders should consider requirements during a rescue or emergency, not just when things are going smoothly. In an emergency, responders must focus on their roles; there still needs to be leaders available to manage the other participants (e.g., when managing a group swimming, at least one person will be needed to watch the other participants if someone needs rescuing).
- In many activities there are often high-risk difficult spots or 'cruxes' (e.g., when a hiker is negotiating a steep section of track). Often each 'crux' requires direct one on one or greater supervision. One way you can manage 'cruxes' is by staging participants in 'safe zones' away from the risk until you are ready to focus on them one at a time. For example, if lighting a stove is a 'crux' then don't have three inexperienced people lighting stoves all at once but have them go one at a time so they can be directly supervised by someone who can intervene if need be.
- Ensure that, where relevant, there is a child protection policy, and the appropriate strategies are in place.
- Ensure that any changes in the supervision structure between the 'event' and 'free time' are documented and understood by the whole leadership team.
- Ensure that the supervision structure has taken into consideration issues around impairment such as driver fatigue, sudden illness, or injury.

## Leader Competence

*The experience and knowledge required by those running the activity, both for normal operation and for managing emergencies.*

## Evaluating Leader Competence

The starting point to evaluate competence is to look at the qualifications potential leaders hold.

THEN YOU MUST CONSIDER THE FOLLOWING:

- **Judgement and decision-making**

*Are the leaders likely to make prudent decisions that provide a good experience while keeping participants safe?*

The simplest way to evaluate this is to understand what sort of experience they have and what sort of crazy stunts, challenges, or problems they may have run into when leading (or helping with) similar activities in the past.

- **'Fit and proper' persons**

*Is there any reason to think that leaders will behave inappropriately to participants (i.e., sexually harass, assault, bully, or steal from participants)?*

The greater the opportunity for leaders to have private contact with vulnerable participants or young people the higher the requirement for demonstrating that these leaders are not a risk. For example, it is not appropriate for a single adult to sleep alone with a group of vulnerable participants as this increases the risk of unwitnessed or uncensored behaviour on the part of that leader and risk to the leader.

This does not mean that every leader needs to be police vetted (receive a police clearance certificate). Safety checks are only a legal requirement in certain situations with paid staff, however other organisations are encouraged to adopt the standards voluntarily. Also, the absence of a criminal history is not a good predictor on its own as to whether someone will be a reliable leader. Organisers need to be confident in their knowledge of the leader's background.

Take into consideration what the client's needs are. For example: schools are now required to check that outdoor centers they want to use have staff with police clearances.

- **Relevant knowledge and skills**

*Are the leaders competent in the specific activities they are being asked to lead?*

Most activities require training some training. For example: either as a tour guide, activity specific (i.e., abseiling) or effective outdoor experiential facilitation.

- **Participant Care**

*Are leaders able to help participants with any special or supportive needs where relevant?*

For example, with a group of children or people with disabilities, are they able to help with toileting contingencies (e.g., bedwetting or managing wheelchair access to a latrine site)?

- **Ability to earn respect and rapport with group**

*Will participants follow the leader's instructions? Will they trust the leaders enough to seek help if required or report concerns?*

Leaders running an activity need to have the respect of the participants so that their instructions, where reasonable, will be followed. Leaders also need to have sufficient rapport with participants such that participants will trust them and will share concerns or problems. Sometimes, having a mix of leaders will help build rapport with different members of a group (e.g., having a team of leaders that is all male may make it harder to build rapport with female participants).

- **First Aid Skills**

*Do leaders have first aid training, or do they have access to this within the group?*

Participants need to have access to at least one current qualified first aid provider. Ideally, this would be a member of the leadership team. This could be from an external company. Alternatively, are there any participants within the group who have the training and are reliable enough to help in a first aid scenario?

## RELEVANT QUALIFICATIONS

There must be qualifications that are relevant to the specific activity (other than tour guide qualifications). For a list of international and South African organisations for qualifications in the Outdoor Sector, visit [www.adventureassociation.co.za](http://www.adventureassociation.co.za) and have a look at the directory.

An outdoor or wilderness first aid qualification is ideal, however a Department of Labour or higher first aid qualification is normally most realistic. (This will depend on the level of risk and skills needed for specific activities).

According to the Tourism Act, you need a valid First Aid certificate before you can register as a Tour Guide.

A Public Drivers Permit (PDP) driver's license where transporting participants on public roads is necessary.

## Resources and equipment

*Consider what equipment and resources are required to ensure the activity can be run safely. The participants may be required to bring this, or it may be provided to them.*

### Participants

Select and adjust equipment to suit participants, including clothing, footwear, and personal medications.

### Group

Include all the group gear that needs to be provided for the activity, e.g., tents for an overnight camp.

### Leaders



List specific equipment that the leader should have, e.g., a first aid kit.  
Include Health information summary, contact information, emergency equipment and site-specific safety information including the emergency plan.

## Emergency planning

*Planning for an emergency involves more than just making sure you can call 10177.*

### **THERE ARE A NUMBER OF THINGS TO THINK ABOUT INCLUDING:**

- How well prepared are we to manage the initial stages of an emergency until help arrives?
- How long would it take for emergency help to arrive by road (or other means)?
- Is there cell phone reception?
- What other forms of communication do we need? Such as Mountain radio, Personal Locator Beacon, or other devices.
- How can we describe where to come?
- How will emergency services get to us?
- Where would a helicopter land?
- How close could a vehicle get to us?

Other questions to think about include:

- Who will need to be informed immediately after an emergency happens?
- Who is responsible for contacting everyone (e.g., emergency contacts, managers, administrators, club presidents) in the immediate aftermath of an emergency?
- Who will communicate with the media?

For help planning, see the editable **Good Practice Guideline Planning Template** for specific activities.

## Exemplars

*Examples of good practice*

[www.adventureassociation.co.za/resources](http://www.adventureassociation.co.za/resources)

## Further support

*Places to gain more information from, e.g., specialist websites, industry bodies or clubs.*

<https://www.hikingsouthafrica.co.za/the-leave-no-trace-seven-principles/>

<https://www.adventureassociation.co.za/>

<http://www.allesmag.co.za/publications.html>

<https://www.adventure-qualifications.com/how-to-be-a-legal-guide-in-south-africa/>

## Definitions

*Terms referred to in this document or in the specific Activity Good Practice Guidelines*

### **Direct Supervision**

Is when the person supervising can be able to physically intervene and proactively manage anticipated hazards.

### **Good practice**

The range of actions currently accepted within the adventure and outdoor sector to manage the risk of harm to staff, participants and visitors.

### **Harm**

Harm is illness, injury, or both, and includes physical and mental harm caused by work-related stress.

### **Hazard**

A hazard is anything that does or could cause harm.

### **Incident**

An event that caused or could have caused harm to any person, damage property, or interruption to process.

### **Indirect Supervision**

Is when the person supervising can communicate with the person being supervised but may not be able to physically intervene to manage hazards should they develop. There are two types of indirect supervision:

- **Proactive Indirect Supervision** is where the supervising staff member is actively monitoring the client and can provide verbal assistance to intervene and manage hazards should they develop.
- **Reactive Indirect Supervision** is where the supervising staff member can communicate verbally and aid a participant when sought but may not be actively monitoring the client or provide pre-emptive assistance.

### **Qualified**

A person who holds a current nationally recognized qualification.

### **Risk**

The likelihood that death, injury, or illness might occur when exposed to a hazard (in other words, a risk means a chance of harm).

### **Safety management plan (SMP)**

The written plan outlining the systems an operator will use to manage safety.

### **Safety management system (SMS)**

The overarching management system for directing and controlling an operation regarding safety.

**Standard operating procedures (SOPs)**

Written information outlining how an operator plans to conduct a particular activity or task.