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INTRODUCTION

There is no requirement for any qualifications to be held by a supervisor, coach or instructor who is leading walking, climbing or mountaineering activities in the UK. However, there is an assumption that such people have an enhanced duty of care and should ensure that they are competent to manage the activities they undertake.

Should an incident occur, there may be an assumption that the activity leader was competent, with them or their employing organisation having taken reasonable steps to ensure competence.

The Health and Safety Executive identifies four ways for leaders to demonstrate competence:

- to hold the relevant national qualification;
- to hold an equivalent qualification;
- to have received appropriate in-house training;
- to be competent through experience.

Mountain Training endorses this view, recognising that national awards are the key components in such an approach, i.e. making judgement about levels of experience and delivering in-house training is best left to appropriately qualified and experienced individuals.

Mountain Training recognises that within climbing walls especially, in-house site-specific training can be a more appropriate and accessible route to competence than undertaking a national qualification, such as the Climbing Wall Award. A site-specific scheme may be established by a facility or an employing organisation (commercial, public or voluntary sectors) and should be delivered by appropriately qualified and experienced individuals.

With this in mind, Mountain Training has prepared these notes to give guidance for establishing site-specific accreditation schemes for climbing wall leaders. These notes are designed for both those seeking information on establishing such a scheme and for those delivering them. A site-specific scheme should assure those involved that a reasonable level of care has been exercised in ensuring the competence of those working with climbing groups.
Any accreditation system based upon a site-specific training and assessment scheme should be developed for prospective leaders who are, as a minimum, competent wall users in their own right. The development of personal competence and safety should be of primary concern to the managers of such a scheme. Each scheme should identify a suitably qualified and experienced technical advisor*. The role of the site-specific award holder is to facilitate the safe and enjoyable use of specified climbing walls at a basic level. Site specific schemes should be designed to be accessible to competent indoor climbers who have an interest in supervising groups. The site specific accreditation scheme should also provide information for those leaders to progress to the Climbing Wall Award if desired.

If it is desirable that any prospective supervisor has had considerable experience of climbing at the specific site for which the scheme has been designed, or, in the case of a brand new wall, a similar facility. They should ideally have some experience of other artificial climbing walls and an understanding of outdoor climbing on rock. Without this experience they may not be in a position to understand the specifics of operating at their site as opposed to others nor relate the place of walls to the broad spectrum of outdoor climbing experiences. It is an important part of any such supervisor’s role that they should be able to guide and counsel novices in ways in which they could develop their own climbing career. The BMC (www.thebmc.co.uk) provides a wealth of free publications and advice on its website to support new climbers, which supervisors can use to enhance their delivery.

* See Appendix 1 for guidance on choosing a technical advisor.

Photo: Beacon Climbing Centre.
ESSENTIAL CONSIDERATIONS

1. SITE SPECIFIC

These guidance notes relate to the development of site-specific accreditation schemes. Such schemes should always be trained and assessed at the venues to which they relate. It is not envisaged that there is automatic transferability of a site-specific validation to another site.

2. OWNERSHIP

The assumption behind these notes is that any site-specific accreditation scheme will be devised for use by and for a specific organisation in a specific location. They are designed to be used in the development of schemes that relate to supervisors working in the context of an organisation. This can include staff of a climbing wall; school teachers at a school wall, youth workers employed by a local authority or volunteer leaders working for a voluntary organisation.

These notes are not intended to be used to create ‘stand-alone’ awards for individuals delivered on a commercial basis nor are they intended to infer skills and capabilities that may be transferred between organisations or venues. If this is desired, the Climbing Wall Award (CWA) is a national award and therefore more appropriate.

3. SYLLABUS CONTENT

Any syllabus devised for a site-specific accreditation scheme must be based upon a thorough risk assessment for each site used. These guidance notes include suggestions for a possible ‘core content’ of the knowledge and skills which may be considered to be common to all such schemes. It should be noted, however, that the level of skills included in this core content will almost certainly differ from scheme to scheme as each may have unique considerations in terms of the site to be used, the intended client group and the nature and level of activities envisaged.

In addition to these suggested core components there must be consideration of such site-specific factors as local regulations applied to the venue, employer codes of practice, health and safety issues such as Disclosure and Barring Service checks (DBS), insurance, equipment, location of fire escapes and first aid. Where necessary these should be incorporated into the scheme.
4. STAFFING

Any site-specific accreditation scheme designed in accordance with this guidance should be run by a suitably qualified and experienced technical advisor. The appropriate qualifications for this level of work would be Mountaineering Instructor Award (MIA), Mountaineering Instructors Certificate (MIC), Aspirant Guide or Guide and the individual concerned should be either directly employed by the operating organisation or employed as a consultant on a contractual basis. It is highly desirable that the technical advisor is a current CWA and/or Single Pitch Award (SPA) course provider accredited by Mountain Training or has considerable experience of working on such courses. Previous experience of running or working on a site-specific accreditation scheme is also highly desirable. The individual concerned should be responsible for the design, development and syllabus of the scheme as well as directly overseeing its delivery. They should personally complete a Statement of Competence naming the candidate or issue all pass validations for candidates who have successfully passed the assessment element of the scheme. These should be signed/emailed by the technical advisor and should, ideally, include a syllabus summary and some form of identification to prevent misuse of such documentation. Monitoring should be done and a time limit stated (i.e. one year).

5. SCHEME DESIGN

The following points should be considered by the sponsoring organisation and the technical advisor when they are contemplating the creation of any site-specific scheme:

a. What is the aim of the scheme? Who is it for and what need is being met that could not be met by recruiting suitably qualified supervisory staff?

b. Which wall(s)/structures and which groups of staff is it aimed at? Who is the operating authority and the person responsible (wall manager)? Who will the client base be?

c. What links does the organisation have with the sport of climbing, if any? What is the depth of understanding and motivation of the organisation?

d. A comprehensive risk assessment should be conducted for the site and the potential staff-group by the designated advisor even where a pre-existing risk assessment may be held.

e. This risk assessment should be used to inform both a listing of skills required by the site and also the appropriate level of skill; these may be classed as the ‘training objectives’ of the scheme and will determine the assessment criteria applied. Operational procedures derived from the risk assessment will depend greatly on the proposed use of the facility, e.g. public/private, novice/club, age of participants, top rope/leading.

f. The level and nature of current experience required of candidates who are entering the scheme should be determined. This will require a judgement as to the levels of understanding and experience required to assimilate and appreciate the skills listed in ‘e’ above.

g. Compare the skills and experience that are considered to be requirements with those of the CWA scheme as administered by Mountain Training.

h. If that comparison indicates that a distinctly lower level of skill, knowledge and experience may be required than that of the CWA scheme a site-specific training and accreditation system may be appropriate. If it does not then the use of the nationally recognised CWA scheme should be considered. Mountain Training can advise on the entry and registration of candidates and supply details of providers of this award scheme.

i. Should a site-specific scheme be deemed appropriate, then materials (syllabus, candidate guidance notes, a logbook, application forms and record keeping schemes) should be devised as well as a suitable structure for the scheme. Consideration should always be given to the length and nature of the training, consolidation period, length and nature of the assessment and any requirements together with a time frame for ongoing revalidation.

Photo: Undercover Rock.
6. TRANSFERABILITY

Although it is possible that some site-specific schemes may be designed to encompass working on more than one venue it may be best to consider the CWA as more appropriate for multiple venues. Furthermore, as the scheme will be designed as site-specific, it must include practical training on any additional venues to be included. This could take the form of a site-specific induction as an addition to the more generic training and assessment conducted elsewhere or could extend to the inclusion of additional skills and techniques that may have been omitted from the original accreditation scheme. Those designing such a scheme must be cautious about the inclusion of differing venues.

7. LINKS TO MOUNTAIN TRAINING SCHEMES

It is recognised by Mountain Training that competent supervision of participants at a climbing wall or other artificial structure can be achieved by adults who may not wish to go forward to the CWA Scheme or may not have the outdoor climbing experience or competencies which are required by the SPA scheme. All of those involved in the delivery of training or assessment elements of any site-specific scheme however, should be holders of a higher level supervisor or instructor award which does include knowledge of, and competence in, outdoor climbing. Staff who are CWA or SPA holders involved in the delivery of a site-specific scheme must be working under the direct supervision of the technical advisor of the scheme.

It is important to educate participants in the links between the site-specific nature of the scheme and the wider world of climbing, including all aspects of climbing from indoor competitions to climbing outdoors. People undertaking the scheme should be able to ensure that participants can be guided in terms of personal progression, the nature of climbing in its broadest sense and the work of the BMC and club structure in supporting climbing and encouraging participation.

8. USE OF THESE GUIDANCE NOTES

Any organisations wishing to develop their own site-specific climbing wall leaders scheme may contact Mountain Training for further guidance and advice. They are, however, advised to do so in conjunction with a suitable technical advisor from the earliest stages.

Further guidance regarding suitably qualified advisors may be obtained from either www.mountain-training.org or the technical staff at Mountain Training.
Although the fundamental principles and the core content of all site-specific schemes may be identical, the exact nature of the syllabus will vary in respect of the demands of any site-specific considerations.

1. STRUCTURE

a. All schemes should operate an identifiable training phase using the site to which the scheme will relate. It may be desirable to deliver the training in two parts, comprising personal skills and group skills. There should also be a separate assessment phase following on from a predetermined consolidation period during which candidates should gain further experience and practice skills. It may be considered desirable to have a two part assessment where the candidate is initially assessed for their personal and technical skills and then is assessed/observed working with a group.

b. The validity of the accreditation should be dependent upon the current experience of the award holder as evidenced by a logbook. This should be carefully defined in the scheme and regular reviews of experience or a revalidation process may be considered by the operating organisation.

c. Climbing activities which involve ropes which are to be supervised by the site-specific award holder are usually either bottom-roping systems or top-roping systems used in situations where the belayer does not have to climb or lead climb in order to reach the top of the route. However there may be exceptions to this at some venues.

d. The delivery of the training and assessment sessions should be as practically based as possible and should give ample opportunity for candidates to both practice the skills of climbing and to demonstrate their abilities. Any theoretical assessment should be regarded as supplementary to the practical element.

Photo: Beacon Climbing Centre.
2. TYPICAL SYLLABUS CONTENT

- The sport of climbing, its development and its ethics.
- Scope of the scheme.
- The use and care of climbing equipment.
- Climbing skills and movement.
- Supervision and group management.
- Risk assessments.
- Accidents and incident/avoidance and procedure.
- Child protection/vulnerable adults.
- PPE, work at height and HSE regulations.
- Consent/emergency contacts/medical declarations.
- Role of the UK mountaineering councils in sport development.

a. The sport of climbing
Candidates should have a good general knowledge of climbing and where to obtain information on current developments relating to indoors and outdoors.

b. The use and care of essential equipment.

Harnesses
Whilst one type of harness may only be available and/or in use in a site-specific environment, it is good practice to introduce candidates to a variety of designs and be aware of safety considerations concerning the buckling and monitoring of harnesses when in use. Where options are available, candidates should be able to select appropriate harnesses for the client group, be able to evaluate damage and know when to refer any defects to a senior member of staff or their technical advisor.

Karabiners
Candidates should be able to select appropriate karabiners and be aware of correct usage (including all locking karabiners) and also be made aware of the type of lower off attachment at the specific site.

Belay Devices
Candidates may be introduced to a variety of belay devices appropriate to their venue. It is important that advantages and limitations of the devices are understood and that candidates can use them safely. It is also vital that an understanding of the relationship between rope type, the climbing activity and belaying device is developed.

Ropes
Candidates should be introduced to common types of rope and understand their construction and characteristics. They should be able to identify damage, wear and take appropriate action.

Helmets
Candidates should be able to correctly adjust, fit and secure helmets should their use be appropriate to the facility or a requirement by the owner/manager of the facility.

Rock boots
Where these may be issued to clients candidates should be able to fit and check for damage.

Autobelays
The use of auto belays need only be covered if in use at the venue concerned.

c. Skills

Attach rope to harness
The candidate should be able to attach the rope using an accepted knot that is properly secured and constantly monitored in use for loosening.

Knots
Demonstrate and teach appropriate knots. It may be desirable for the candidate to be able to develop the skills of the client group by teaching knot tying. The supervisor, however, should be considered as responsible for ensuring the security of those knots.

Belaying technique
Candidates must be competent belayers, and able to demonstrate confident and fluid belaying technique.

Climbing movements
Demonstrate basic climbing movements. The candidate should show understanding of how to use the body to climb ad should be able to communicate that understanding to others.

Injury Prevention
Demonstrate a working knowledge of the principles of warming up, warming down and injury avoidance. Whilst the degree of sophistication of this knowledge will vary from scheme to scheme the candidate should, as a minimum, be able to structure a climbing session so as to minimise the risk of tissue damage and maximise the physical benefit to the participants.

Problems
Be aware of the common problems that may arise during climbing sessions and take steps to avoid or minimise their likelihood. Supervisors may be the only technically competent person on the site so must be able to deal with any issues that may arise.

They must also have a clear understanding of all safety procedures including how and where to get help, what first aid or emergency equipment is stored on site and how to access it. They should also be aware of where the accident and near miss books are kept and what type of incidents need recording or reporting to the technical advisor.
d. Supervision

Belaying
Supervise others belaying. The candidate should know how to supervise including when and how to intervene. They should also have an understanding of the difficulties associated with supervising a number of belayers. They should understand the problems associated with widely differing bodyweights in a group and be able to cope safely with them. Candidates should understand the benefits and limitations of different backup systems including ground anchors (if available) and be able to deal with holding an unexpected fall. Communication, terminology and particularly noisy environments will also need to be considered.

Management
Manage a group at the specific site. Candidates must show an understanding of the needs of other wall users and ways of working that do not inconvenience or put others at risk. They need also to develop strategies for controlling groups within their wall environment. An agreed safety briefing may be discussed relating to the removal of jewellery, not leaving the ground without instruction, spinning holds, bolt hangers etc.

Bouldering
The candidate should be able to use the activity of bouldering to develop skills and strengths in participants. They should be able to demonstrate and supervise safe ‘spotting’ and control the activity in order to minimise risks (e.g., the imposition of height limits and down climbing rather than jumping). They should also understand the pros and cons of the floor covering at their venue (from sprung floors, separate ‘gym’ mats to purpose matting); and what constitutes safe practice at their site. Candidates must appropriately brief participants in safe usage of a bouldering area and explain the risks as necessary.

Working practices
Specific venues may have child and vulnerable adult protection policies that need to be observed. Candidates should be aware of the need to both protect, and work in such a way as to maximise, the safety of children and vulnerable adults from abuse. They should also be aware of the need to observe sensible precautions for their own security and the prevention of any allegations.

e. Knowledge

Safety requirements. Candidates should be familiar with general and site-specific safety requirements. They should be aware of any rules and regulations that may apply to both ordinary participants and supervised groups.

Knowledge of the activity
Candidates should be able to inform participants about the wider world of climbing and relate the site-specific to the many other facets of the sport. It would be advantageous if they can refer participants to opportunities for future development, such as mountaineering council workshops and publications or the National Indoor Climbing Award Schemes.

f. Possible additional elements
(Subject to site-specific requirements)

- Placement of ropes where they are not in situ and top access is not available. This could be done by the supervisor leading a climb or ascending by other means as agreed with the technical advisor. Group management and supervisor safety should be paramount.
- The use of matting where this is available as mobile safety mats.
- The management of groups abseiling on artificial structures. There will be a need to enhance group management, technical ability and knowledge and the ability to avoid and solve realistic problems.

This is not an exclusive list.
Technical advisors are very common in the adventurous activities industry, providing advice on a range of activities. Below are some of the attributes an organisation should expect a technical advisor to hold and services provided.

- To be qualified as a mountaineering instructor (MIA or MIC qualification) or mountain guide for a number of years.
- To be a member of either AMI, the Association of Mountaineering Instructors or the BMG, British Mountain Guides. Both organisations have professional codes to which their members must comply.
- To have experience of delivering similar site-specific accreditation schemes to other organisations.
- To hold appropriate insurance indemnifying themselves in the delivery of a site-specific accreditation scheme.
- To provide, in advance, a clear outline of the costs involved in delivery of a site-specific accreditation scheme, the time commitment required of staff undertaking the scheme and the length of time between revalidation, where this is required.

**FURTHER GUIDANCE**

Anyone seeking training for themselves and/or their staff may wish to ask a prospective technical advisor any, or some, of the following questions:

**Q. Have you read the site-specific guidance published by Mountain Training?**

A. Hopefully – the answer is yes – if not find another technical advisor.

**Q. Have you delivered site-specific training for other organisations similar to that I’m looking for? And if so, could you let me know which organisations they are?**

A. They should be able to provide references or at least evidence of previous delivery.

**Q. Do you hold either an MIA, MIC or Mountain Guide qualification, as recommended by Mountain Training?**

A. An SPA/or CWA is not considered an appropriate award for anyone to direct a site-specific scheme. They may help to deliver a scheme but only under the direct supervision of an MIA or above.

**Q. Do you deliver any of Mountain Training’s climbing leadership schemes such as the CWA, Climbing Wall Leading Award or SPA?**

A. It is recommended that Course Directors for site-specific training are existing Mountain Training providers of the CWA, CWLA or SPA and ideally have attended an AMI technical advisor workshop.

**Q. How long will the training take?**

A. This is dependent on numbers and course requirements as the facility will often dictate what is required. Most providers will stipulate between six and 12 hours contact time depending on the level of experience. Courses are generally run over a day and a half or three evenings and would normally accommodate about six staff.

**Q. Do my staff require any prior experience to attend the training?**

A. No although some basic knowledge would be an advantage.

**Q. Once trained how many climbers could my staff supervise?**

A. This is almost impossible to say as there are many variables and would be entirely dependent on the facilities, age, experience and ability of the climbers.

**Q. Would my staff need any refresher training at a later date? If so, how often?**

A. As with first aid, periodic revalidation is normal practice for a leader undertaking a site-specific accreditation scheme.

**Q. What is the legal situation regarding advice given by a Technical advisor?**

A. Technical advisors would normally be covered by insurance to offer advice. It is the client’s responsibility to take that advice or not. However cover can vary so they should be able to produce evidence.

**Q. Once assessed, does the trainer/assessor take responsibility for the candidate’s ongoing performance?**

A. No, the technical advisor will issue a pass or statement of competence where someone has demonstrated an appropriate standard on the day of the assessment, rather like a driving test. Outside of that it will be the responsibility of the climbing wall manager/teacher in charge to see that standards are maintained.

**Q. Are you current and in practice?**

A. They should be able to point you to their blog or record of workshop attendance.
Climbing walls must meet the Health and Safety standards as set out by the HSE. In order to do this each site will need to:

• Have a named person with overall responsibility for the management and maintenance of the climbing wall.
• Have a named technical advisor, who will provide expertise and work with the school to develop and maintain suitable operating procedures and training schemes.
• Ensure that written risk assessments and operating procedures are kept up to date for all aspects of the climbing wall maintenance and use.
• Ensure that teachers and other adults who supervise climbing activities are recognised as competent through national climbing awards or a site-specific accreditation scheme.
• The scheme should support good practice, encourage learning and point to further opportunities for climbers and climbing leaders.

Additional considerations might include compliance with:

• H&S at Work Act 1974.
• Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 1995.
• Working at Height regulations (Amendment) 2007.
• Provision and Use of Work Equipment Regulations (PUWER) 1998 – Equipment inspection.
• British Standards for Climbing Walls:
  BS EN 12572: Part 1 – Climbing Structures,
  Part 2 – Bouldering Walls, Part 3 – Climbing holds,
  BS EN 12503-1 – Matting.

APPENDIX 3

Mal Creasey
BMG MiC Technical Advisor

Statement of competence for delivering sessions on the indoor wall at Suchagood School, Rockhampton.

Candidate: Miss Abi Seiler

Abi has been a member of the PE staff at this school for five years and has assisted me delivering sessions on the school wall several times. She also attended a site-specific training and assessment on the 28 July and 10 August 2015 respectively. Both courses were based on the School Wall at Suchagood School. The course lasted for a full day and included an element of training followed by a short assessment where I observed all the trainees working with novices from the school.

Syllabus areas covered included:

a. The sport of climbing, its development and its ethics.

b. The scope of the scheme.

c. Use and care of essential equipment.

d. Climbing skills and movement.

e. Supervision and group management.

f. Risk assessments.

g. Accidents and incident/avoidance and procedure.

h. Child protection /vulnerable adults.

i. PPE, work at height and HSE regulations

j. Consent/emergency contacts/medical declarations.

This statement of competence is for Abi supervising sessions on the wall with youngsters during and after normal school hours. Groups will be limited to six unless Abi is working alongside another member of staff who will also have completed the same site-specific training and assessment process.

Abi is an experienced teacher. Previous to this school she taught at Someotherschool after completing her teacher training. She has some outdoor climbing experience and has also recently updated her first aid certificate.

Abi should restrict herself to the general supervision of groups using the wall including belaying, top roping and teaching rope work as appropriate, such as attaching the rope to a climbing harness. However, she cannot teach leading, sign off any other member of staff or act as a technical advisor. As the wall has a small, easily accessible abseil tower she may supervise abseiling from the tower. In this instance she must limit herself to a maximum of three abseilers off the ground at any one time.

Abi must keep a log of the sessions she delivers which must be verified by her head of department and will be reviewed by me every six months.

This statement must be reviewed in 12 months by either myself or another technical advisor to ensure that Abi remains current and competent.

I also advise that myself or another qualified and experienced person makes occasional visits to the wall during sessions to ensure good practice in overall safety management of the indoor facility at Suchagood School.

Signed: Mal Creasey – Technical Advisor
Date: 15.11.15

Signed: Miss Abi Seiler – Suchagood School
Site-Specific Training/Assessment

This is to certify that

Miss Abi Seiler

passed her site-specific assessment on the above named wall on the 15 November 2015.

She must be reassessed at the same venue within 12 months of the above date.

a. Syllabus areas included: The sport of climbing, its development and its ethics.

b. The scope of the scheme.

c. Use and care of essential equipment.

d. Climbing skills and movement.

e. Supervision and group management.

f. Risk assessments.

g. Accidents and Incident/avoidance and procedure.

h. Child protection/vulnerable adults.

i. PPE, work at height and HSE regulations.

j. Consent emergency contacts/medical declarations.

Found this book useful?

You will find the other essential Mountain Training publications helpful too.

Suchagood School Indoor Wall
Rockhampton

Tools and techniques for navigating in the hills and mountains including winter, overseas and GPS.

An essential reference tool for every mountaineer venturing onto non-glaciated snow and ice.

The official handbook of the Mountain Training walking schemes.

Available in all good bookshops and online www.mountain-training.org

Appendix 5

Other useful documents, references points and resources could include:

- National Guidelines MTUK.
- BMC’s Parent’s Guide.
- BMC’s New Rock Climbers.
- BMC’s Climbing Wall Essentials DVD.
- Mountain Training’s Climbing for All.
- BMC TV films on using climbing walls.
- Grit Kids film – downloadable from NICAS website, www.nicas.co.uk
- Association of British Climbing Walls (ABC) www.abcwalls.co.uk/about/code-of-practice/
- NICAS Beginners Guide to Climbing.
- Mountain Training’s Rock Climbing Essential Skills & Techniques, by Libby Peter.