

# Rock Climbing Development Instructor

## Guidance notes for trainers and assessors

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## Introduction

These guidance notes should be used together with the Rock Climbing Development Instructor candidate handbook.

### **Candidate experience**

- It is important candidates have the appropriate level of experience and currency to allow engagement with course content. Although candidates will have the minimum experience requirements evidenced in writing at training (vetted at the registration stage), please inform the relevant Board Officer if there is cause for concern. Candidates must satisfy the prerequisites at assessment, and this must be evidenced in writing, ideally in [DLOG](#).
- A thorough review of a candidate's logbook in advance of the course should provide the course director with information about their breadth, depth and currency of experience. It's important to scrutinise the quality, not just the quantity.
- Trainers should be mindful of experience levels of candidates when introducing content especially if techniques shown are on the fringe of the qualification scope.

### **Responsibility for safety**

- Course directors and staff should remember that they are ultimately responsible for the safety of everyone, during any training or assessment course, and will do all they can to prevent accidents leading to physical or mental injury.
- Rock Climbing Development Instructor courses are for candidates with considerable personal and instructing experience. While course staff should endeavour to maintain a safe working environment and the overall responsibility lies with them, participants also have a duty to exercise judgment and voice their concerns regarding their own personal safety and that of other members of the group. This should be outlined to candidates.
- The course director's objective scrutiny of a candidate's DLOG prior to a course, backed up by seeing them operate (safely and in a managed context) helps support decisions regarding the appropriateness of exposing candidates to increased risk.
- Trainers and assessors should be mindful of the psychological pressure candidates may feel to perform. This can be effectively managed by course staff through

attentiveness to the group's needs, recognition of individual differences, and an understanding of how group dynamics and the environment interact. Course staff self-awareness is also essential; understanding one's own strengths, limitations, and training or assessment style supports informed decision-making and contributes to safer outcomes.

**Venue choice**

- Course directors should select venues carefully, bearing in mind the aims and objectives of the day. Venues should have sufficient routes at the required grade and there should be a plan for sub-optimal conditions that is shared with the candidates, reinforcing the practice of good decision-making.

**Managing lead climbing**

- Lead climbing needs to be carefully managed. Course staff should consider a lower grade warm-up route or top-rope exercise, or other suitable steps to ensure that lead climbing at the required grade is not their very first interaction with lesser-known candidates, for whom that grade may be their maximum. They should also share and discuss this process and rationale with the candidates – they are being trained/assessed in their judgement and decision making after all.

**General**

- Training and assessment courses should facilitate open discussion.
- Assessors should set realistic tasks or scenarios rather than request specific techniques be demonstrated. Tasks set should not demand solutions that use techniques beyond the scope of the qualification.
- If assessment candidates are unable to demonstrate competence initially, other opportunities should be given where possible or appropriate. Careful attention to prevailing conditions is essential to support fair assessment.
- Course staff should encourage candidates to engage in reflective practice. recognising they, in turn, must foster this in participants they subsequently instruct.

In conclusion, Rock Climbing Development Instructor courses are for participants with considerable personal experience. While course staff should endeavour to maintain a safe working environment, participants also have a duty to exercise judgment regarding their own personal safety and that of other members of the group.

## 1. Equipment

### **Trainers:**

As experienced rock climbers, candidates will likely bring their own personal climbing equipment to the course. This may include items suitable for trad and sport climbing activities and if requested, this may also include equipment to facilitate the development of participants. Their choice of equipment in both contexts can be revealing and prompt valuable discussion regarding its acceptable use, care and maintenance.

Trainers must ensure candidates develop a deep understanding of the use of key items and their limitations in relevant contexts, primarily through practical activity.

Where specialist equipment is referenced, it should be used according to manufacturer's guidance. Improvisation is likely unnecessary given the scope of the qualification. Specialist equipment introduced must be commonly used in rock climbing environments.

In-situ equipment at sport and trad crags should be referenced. Candidates should be taught to make informed judgements about its use, condition and maintenance.

Discussions around equipment care, maintenance and use should feature as a topic throughout the course rather than as an isolated session.

### **Assessors:**

As with training courses, candidates should be encouraged to bring their own equipment to assessment. This should be carefully critiqued by course staff with reference to choice, suitability, history of use and maintenance.

As experts, instructors are expected to have a comprehensive understanding of the use, care and maintenance of commonly used trad and sport climbing equipment and be able to clearly explain why they would choose one item over another. This is particularly important where specialist equipment is used.

Tasks set must not demand the improvised use of equipment. Where candidates use equipment safely but on the fringe of the manufacturer's approved use, they must show an awareness of this, be able to explain why their approach is acceptable in the given context and demonstrate strategies to reduce any risk.

Although it is expected candidates have a comprehensive understanding of commonly used equipment and its use, they should know where to access reliable information if they appear unsure. Setting a task to do this may be of merit.

## 2. Anchors

### **Trainers:**

Candidates should access a range of different venues during training courses. Venues chosen should accommodate various placed and in situ anchors and ideally have differing rock types, situations and complexities.

As qualified Rock Climbing Instructors, candidates should be proficient in building and attaching themselves to single and multi-point anchors, but assumptions should not be made. It is possible to have climbed many routes over a long period without ever weighting the system. During the course candidates should be supported to develop this skill so they can model safe and efficient placements in a range of rock types every time. It is likely these skills can be covered in context or as part of a peer-led activity.

An anchor selection task early in the course should enable course staff to gain an understanding of candidate proficiency and currency. Such a task is likely to be valuable when teaching anchor building to participants. Where candidates need input, subtle refinement throughout delivery is preferable than a lengthy session in isolation.

It is acknowledged the candidates will have their preferences for attaching to anchors, so steering them towards flexible strategies is important, both to enable them to deal with more complex situations and to blueprint versatile solutions for participants they instruct.

As qualified Rock Climbing Instructors, the candidates should be similarly proficient in setting up top and bottom ropes and personal abseils. Regarding the latter this might well progress to establishing a system for self-lining. Ensuring candidates understand the value of semi static/low stretch ropes with rope protectors is therefore important.

### **Assessors:**

It is expected that the best available, safe anchors are selected in a highly efficient manner throughout assessment courses. Candidates should be observed using passive, active and in-situ protection. Reviewing all anchors that candidates place throughout the course is important to ensure fair assessment and the safety of those in attendance.

Candidates should be given the opportunity to simply and concisely explain their choice of anchor, to the assessor and/or the participants, as this is key to the role.

Candidates need to demonstrate that they can reliably attach themselves to anchors in a safe and efficient manner, in a range of contexts and explain their choices. Similarly, if a task demands a top or bottom rope, an abseil or self-line, candidates should be able to create appropriate anchor systems safely and efficiently.

In summary, the candidate's competency should be so well established that their primary attention can be on how best to support and develop participants.

### 3. Belaying

#### **Trainers:**

It is recognised that despite candidates being highly experienced, they may have picked up bad belaying habits. The training emphasis will therefore be on using belay equipment in line with manufacturer's guidance and refinement of their skills if required, with input drip-fed through the course, rather than a session in isolation.

Trainers should explore candidates' understanding of commonly used manual and assisted braking devices relevant to the role. The emphasis should be on the manufacturer-approved use of commonly used equipment, so candidates feel confident selecting an appropriate device for the activity. As such, a lengthy session covering every possible option is not required. The focus of training should be on choosing an appropriate belaying set up for the situation.

Competent belaying and being able to hold a fall or slip and carry out controlled lowers are all essential skills. Throughout the training course candidates should be encouraged to demonstrate model belaying technique appropriate to the device, ensuring both their safety and that of the climber, whilst providing an 'expert model' example for their future participants.

Competent lead belaying and holding a leader fall are essential skills and should be addressed during training. This should be covered in both trad and sport climbing environments and include dynamic belaying, as appropriate. Trainers should be able to demonstrate good practice in this regard.

When covering holding leader falls, it is important to consider that candidates will likely emulate the same approach with participants in the future. For this reason, intentionally taking leader falls is not acceptable on training courses and lower risk activities should be conducted instead. This may include ground-based activities or bottom rope backups, for example.

Course staff should include the following key principles regarding belayer positioning when covering this topic;

- **Positioning relative to runners/clips:** The belayer should anticipate the direction of pull and position themselves accordingly to maintain control.
- **Proximity to the crag:** Staying close to the crag minimises excess rope between the belayer and climber, improving stability, response time and control.
- **Managing weight differences:** Strategies should be taught for handling differing body weights between the belayer and climber, and understanding the associated implications for holding a fall.

Trainers should cover the use of series and parallel ropework. Regarding the latter, the purpose would be to maximise climbing activity to refine movement skills and expose those concerned to a variety of trad placements, for example, rather than just guiding routes. Being able to choose the best approach to ropework relative to the situation is fundamental and should be taught. In some circumstances the pitch length or complexity of the line will mean there is little benefit in both seconds climbing at the same time.

It is likely a device with a 'guide' function is best used when belaying in parallel, whilst recognising the complications with one climber topping out in advance of the other. Manual belay devices with a 'guiding' function or a 'guide plate' should therefore be introduced on training courses. Consideration should be given to the appropriate context and broader message when doing so. Given the developmental role, instructors will primarily demonstrate indirect belay systems to participants, using techniques conventional to recreational practice, rather than focus on direct belays.

#### **Assessors:**

Selecting the most appropriate device, technique and belay system is fundamental to the role.

Assessment scenarios should require the candidates to safely and efficiently set up and use direct and indirect belay systems, including series and parallel ropework, appropriate to a variety of situations.

They should provide candidates with an opportunity to evidence an excellent understanding and demonstration of manufacturer-approved practice. Their choice of device, technique, and how they might vary their approach with respect to the activity, participants and environment should be questioned. Mindful of the role, candidates should have enough knowledge to be able to simply and effectively teach these skills to a range of participants.

With regards to safely holding lead falls in trad and sport climbing environments, facilitating candidates or participants taking leader falls for real, is not acceptable on assessment courses. Lower risk or ground-based activities that involve dynamic belaying where appropriate should be conducted in preference. Where differing strategies are introduced the pros and cons must be discussed.

## 4. Personal skills

### **General**

Excellent personal skills are acknowledged to be the foundations of safe and effective instruction. Personal lead climbing competence ensures instructors can safely undertake the activity themselves and in doing so lead others, providing an aspirational model of good behaviours to participants.

It is expected candidates will lead trad and sport routes during training and assessment courses. Before all lead climbing, course staff must completely assure themselves that individuals can safely undertake the activity, likely through progressive practical tasks and careful questioning. This will probably include setting up and using top and/or bottom ropes, for example. Careful consideration should also be given to the prevailing crag and weather conditions before lead climbing.

It is important the venue chosen allows candidates the opportunity to warm up, both physically and psychologically, which supports a progressive judgement of competence. This is particularly important where candidates may be unfamiliar with the rock type and character of venue.



In all cases, careful consideration must be given to the choice of routes, avoiding climbs that are poorly protected or notorious for being deceptive in difficulty ('sandbag' routes). Course staff will typically know the routes well and can offer guidance, subtly influencing candidate decision-making. It is essential that all chosen routes offer adequate protection.

Course staff must remain alert and adaptable during course delivery, with an acute awareness of key indicators that may prompt a change in approach or intervention. This may be the result of changes in the environment including weather, or the psychology of the candidate, and could mean that lead climbing cannot be safely completed.

Course staff must maintain open, empathetic dialogue with candidates throughout delivery, welcoming comments, queries and concerns. In doing so all individuals must understand the shared responsibility to make decisions and in doing so, maintain safety.

**Trainers:**

Although candidates should arrive on courses with a good breadth and depth of rock climbing experience, competence, currency and approach will vary, perhaps influenced by a trad or sport climbing specialism or their regular climbing partners. Equally their technical skills, although perhaps proficient, might not always offer an adaptable and simple approach when demonstrating to others. As a result, some refinement may be required.

Given the experience level of candidates, they should be able to make decisions to select appropriate venues and rock climbs. A more advanced approach that includes careful attention to rock type, crag condition, forecasted weather changes and access should be trained. A scenario-based approach may work here, tailoring choices to differing climbing activities and participant aspirations.

Although it is expected that candidates will lead trad and sport routes during training courses there is no requirement to climb at a particular standard. Operating on a lower grade climb will likely enable candidates to learn more effectively and these routes commonly offer teaching opportunities more relatable to the role.

Given the importance of safe fluid movement, candidates should be taught to demonstrate good technique when climbing. Trainers may need to demonstrate this themselves to benchmark the minimum standard required at assessment.

**Assessors:**

Candidates should demonstrate an approach to choosing appropriate venues and climbs that considers differing crags, their likely condition, the impact of changing weather and

access. It is expected that candidates can make excellent choices in familiar areas and have a good strategy to handle environments less known to them.

In an ideal setting, candidates should be visiting unfamiliar crags and having to use a guidebook to seek out suitable routes to lead. Candidates will need to have experience of leading Very Severe 4c and F6a graded climbs in their logbook, and discussion with them individually should take place to verify this experience. The ability of the candidate to lead at Very Severe 4c and F6a on assessments is required should suitable conditions allow. This will inevitably mean the course staff will find themselves balancing the syllabus requirements with the ability of the candidates and the prevailing conditions at appropriate crags to work out the safest most appropriate way to assess this element. This may require a reordering of the course programme or in exceptional circumstances that the lead climbing is demonstrated at a lower grade or with top rope security. In these cases, DLOG will help inform the assessor that candidates can climb at the required grade. On these few occasions please note the occurrence in 'Confidential Comments' on the course report form.

Climbing VS or 6a must not purely be a 'tick box' exercise. By leading trad and sport climbs on assessment candidates have the opportunity to demonstrate competency across a range of syllabus themes including judgement and decision-making. Climbs chosen must provide suitable opportunities to do this.

Irrespective of ability, candidates must be given the opportunity to 'warm up' prior to leading VS and 6a and the chosen crag should allow this. This will likely be by leading lower grade climbs first. Observation of performance is key here to indicate to the assessor that the leading of VS and 6a can be safely completed. This observation may include;

- Reviewing movement skills in advance of lead climbing
- Belay construction tasks which do not necessitate lead climbing
- Course staff reviewing lead climb performance whilst self-lining
- Course staff seconding climbs to assess the quality of anchor placements

Course staff must recognise, and not underestimate, the psychology of candidates on assessment feeling the pressure to perform. This is likely due to a number of factors, for example;

- A misunderstanding of the standard and purpose of activity
- Peer to peer benchmarking and influence
- The situational influence of being assessed

Course staff should remain mindful that most candidates will feel nervous and under pressure and therefore may not climb at their best during the assessment, nor think objectively as they might normally do.

## 5. Background knowledge

### **Training:**

At the beginning of all training courses, staff should outline the role and philosophy of Mountain Training with reference to qualification pathways.

The difference between the role of a Rock Climbing Instructor and a Mountaineering and Climbing Instructor, and that of a Rock Climbing Development Instructor should be clear to candidates and a discussion may be required. Scope and terrain should be referenced when doing so.

The related work of wider bodies and third parties, including the mountaineering councils, should be referenced during courses as opportunities arise. Although some work will be relatable to the Rock Climbing Instructor qualification, e.g. use of RAD in England and Wales, it is expected that reference is made to work streams and initiatives applicable to Rock Climbing Development Instructor, specifically developing movement skills to support safe lead climbing for example.

It is likely the candidate's background knowledge will have increased somewhat since qualifying as a Rock Climbing Instructor and as such facilitated discussion centred on key topics is likely the best approach.

Sufficient background knowledge will allow them to support participants they subsequently take out. At the end of the training, candidates must understand the expectation upon them to develop enough expert knowledge to inspire participants when delivering sessions.

### **Assessors:**

It is expected that candidates demonstrate a broad depth of background knowledge that informs their decisions and practice.

Sufficient specialist knowledge of trad and sport climbing activities to inform and inspire others should be evident. It is recognised that limited contact time may restrict deep

investigation and as a result a well presented and focused research task or paper may support assessment of this section of the syllabus.

## 6. Instructor responsibilities

### **Trainers:**

Candidates should be taught to establish appropriate, specific aims and objectives in partnership with participants during initial briefings. It is expected the instructor will lead the initial discussion and can clearly explain appropriate task progressions to achieve the desired outcomes. This ensures all concerned are informed of the approach from the outset and the risks involved.

Aligned to Mountain Training's ethos candidates should be encouraged to remain open minded and positive when teaching others.

As well as appropriate in-person training on this area of the syllabus, trainers should encourage candidates to complete Mountain Training's 'Leader responsibilities' e-learning course.

### **Assessors:**

Tasks should be set that enable candidates to articulate their role and responsibility to participants and/or third parties.

Candidate competency in this area of the syllabus could be assessed through a review of pre-course communication with participants, risk assessments, scenario-based tasks, discussions, introductory tasks with mock students (if used) and questioning.

A participant-centred approach should be evident throughout. It is expected candidates are aware of a variety of potential barriers to participation and safe ways to overcome them, with a range of individuals. Questions, drip-fed through delivery or scenario-based tasks, based on individual personas might present good assessment opportunities.

## 7. Leadership and decision-making

### **Trainers:**

It is expected that the leadership and decision-making competencies are central threads throughout training course delivery. The 'Vision, Support, Challenge' model and Rock Climbing Instructor notes for trainers (section 8) should be referenced and is not repeated here.

Candidates should be trained to maintain situational awareness throughout activities. They should be made aware that their advanced observational skills, decision-making and subsequent action will directly impact on the success of the activity. Candidates should be taught to recognise key indicators and take appropriate action to meet ongoing safety, group and task requirements.

Consistency and confidence in decision-making comes with experience and the foundations can be established during training courses. Showcased by course staff, candidates should be taught to succinctly explain 'what' and 'why' when key decisions are made and each task given should have a clear purpose. Facilitated peer to peer dialogue and review will likely support decision-making further. Course staff should adopt an approach open to challenge by the candidates present and welcome their contributions to foster confidence in approach. Candidates should be taught to maintain a comfortable learning environment for all participants in attendance.

Role modelling is acknowledged to be key when leading others and it is therefore important that course staff model safe, inspirational and relatable behaviour throughout. Trainers should also be well-presented and maintain an organised and efficient approach at all times, recognising they will be setting the standard for how they wish candidates to behave.

Trainers should ensure that candidates are taught how to create and maintain a positive and supportive environment when undertaking activities. Their ability to recognise, respect and adapt to individual needs is central to the role. In doing so candidates should be taught;

- How to analyse a participant and their performance and identify where best to focus input.
- How to make useful observations and offer critical analysis.
- To make appropriate and timely interjections and feedback. A sophisticated approach to questioning will inform the next steps.
- To listen well to the participant(s) and adapt their approach accordingly.

- To recognise potential barriers to learning e.g. fear, complexity, fatigue and how to overcome them.
- To ensure flexible progressions are tailored to the participant in the moment.
- Strategies to develop independent participant learning.

A creative and experimental approach should be encouraged throughout. Candidates should be taught to use evidenced praise i.e. observable, measurable, and linked to the specific behaviours, to positively influence performance, reacting calmly and reassuringly in stressful situations. Mistakes should be handled in a positive, non-condescending manner.

Candidates should be trained to use multiple strategies to challenge participants, centred on developing rock climbing proficiency, where lead climbing is not necessarily the desired outcome. Measurable desired outcomes should be established before commencing tasks.

**Assessors:**

Assessors should consider introducing the VSC model at the beginning of the assessment and use this to help frame the assessment process and manage candidates' expectations. Additional guidance for assessors on this area can be found in the Rock Climbing Instructor guidance notes and is not repeated here.

Assessment of this area of the syllabus is likely to be continuous and may include scenario-based tasks, questioning and time with mock students. If used, students will need to be chosen carefully to facilitate fair and effective assessment. Observable leadership behaviours and their appropriateness to the situation can be noted by assessment staff to support end of day debriefs. Candidates don't have to have a comprehensive understanding of the theory behind a particular approach, as long as it is used appropriately.

Assessors should recognise decisions made and actions taken by candidates and whether they are appropriate for the situation or the mock students (if they are being used). Candidates should be asked to clarify their decisions or actions if there is any uncertainty, to avoid incorrect assumptions being made by the assessor.

Candidates must show well developed situational awareness, quickly recognising key indicators where the safety and/or value of activity or a task could be improved by intervention. Subsequent action should be timely, well considered and have a positive impact.

Being able to effectively profile participants and acknowledge their normal behaviours, recognising when those behaviours change in relation to the environment and task, is fundamental to ensuring positive outcomes.

## 8. Knowledge and demonstration of techniques

### **Trainers:**

The Rock Climbing Development Instructor scheme is for experienced instructors wishing to develop a participant's rock climbing proficiency. This development may extend to lead climbing.

All techniques covered by the trainer should be directly aligned to this scope. Although techniques relevant to the Rock Climbing Instructor qualification will be required, these should be well established in the candidate's practice. As a result the emphasis should be on developmental techniques, rather than purely the basics.

It is important that training covers how candidates can recognise when lead climbing is not the participant's goal, or appropriate, and what options exist for alternative development, rather than persevering with unrealistic or inappropriate tasks.

Trainers should support candidates to become proficient at assessing the suitability of a venue for developing rock climbers. This should include consideration of the following;

- Rock type and nature.
- Variety, grade and style of routes available.
- Abundance, reliability and complexity of anchors available on routes and at belays.
- Remaining in scope, objective dangers present on approach, at the base, on the routes and at the top of the crag.
- Potential for valuable ground-based activity.
- Exposure to changes in environmental conditions. The emphasis here will be to assure safety but also maximise learning.
- Suitability for establishing top and bottom ropes and self-lining systems.

Such an understanding will enable candidates to select appropriate venues and routes, suited to the individual(s) concerned and desired outcome.

Trainers should cover a range of versatile and adaptable activities than can be used to develop key skills and be adjusted to the participant's needs, venue and environmental

conditions. This should include sport and trad climbing activities and be modifiable for novice and more experienced rock climbers. Activities may centre around the following;

- Anchor selection (both in-situ and leader-placed)
- Belay construction (single and multi-point systems)
- Lead climb belaying (manual and assisted devices)
- Basic problem avoidance
- Rigging and stripping a sport climb
- Climbing movement
- Clipping technique

Stable and assured movement supports efficient and safe lead climbing in both sport and trad contexts. Trainers should cover how to facilitate the development of movement skills, through top and bottom roping and bouldering, with an emphasis on climbing efficiently and maintaining stability. Candidates should be signposted to FUNdas courses and the Coaching qualifications for further development in this area, beyond what is covered on the training course.

Where lead climbing is a participant's goal, their first lead climb on an appropriate route should be safe and successful because the instructor has already covered the foundations of lead climbing and observed competence in all required elements.

Trainers should explain to candidates that it is critical to ensure belay competence in both parties before allowing novices to undertake lead climbing. It is worth noting that if a novice lead climber takes a fall, it is generally an unexpected and sudden event e.g. a foot slips, a hold breaks etc. Even if the supervising instructor is in close proximity to the participant, they may not have the time to do anything before the student is falling. The importance of this should be highlighted to candidates.

**Assessors:**

Assessors should be able to observe candidates taking a participant-led approach throughout, catering for the needs of a developing rock climber, irrespective of level or goal in trad or sport climbing. Effective demonstrations and activities cover the right technique at the right time for the participant, making best use of the available environment. Assessors should query candidates if they are unsure about the purpose of a particular activity or demonstration.



Stable and assured climbing movement is central to all development. Candidates should be able to accommodate a broad range of participants in this regard and improve performance in both sport and trad environments. The emphasis should be on varied practical activity throughout.

Competency is likely best assessed using mock students, who must be well chosen to facilitate fair assessment. If planning and delivering activities to support participants towards independent lead climbing is not appropriate for the mock students, assessors must provide opportunities for candidates to describe how they would do this in a safe and progressive manner.

## 9. Personal safety

### **Trainers:**

Trainers should cover how to manage personal safety throughout all activity, whether ground-based or at height. Due to the increasing complexity of activities compared to Rock Climbing Instructor, it should be highlighted that a thorough approach is essential when instructing, for example when the instructor is being belayed by participants. Course staff should model good behaviours in this regard to not only assure safety but also send a strong message to impressionable candidates of how to conduct themselves in the future.

There may be times where instructors operate at height un-roped (e.g. when setting up ropes). In these instances, course staff should be able to explain why this might be appropriate given the context and mitigation strategies to manage the risk. In all cases candidates should be taught to remain aware of the risk present and manage it with the best, most appropriate course of action. There should be no reason to expose oneself to significant risk operating within the scope of the qualification.

Self-lining may be used to manage instructor safety whilst supporting participants lead climbing. As such this technique should be introduced during training courses. Given the broad and extensive range of essential climbing activities a participant will have completed prior to leading, and the limited value of interaction whilst using the technique, self-lining should occupy a small part of a training course. Consideration should be given to the following when introducing the technique;

- Semi-static/low stretch and dynamic rope use should be introduced and the benefits and limitations discussed. Candidates should be advised to use semi static/low stretch ropes in single pitch environments where possible.
- Anchor systems must have significant built-in contingency. This should include reference to potential abrasion and differing directional loads.
- Both re-belays and redirects should be introduced and their pros and cons discussed\*.
- A maximum of two, versatile systems should be taught, with no deviations or improvisations. Given equipment presently available these will likely include an auto-locking device with a handled ascender with appropriate length attachment to harness. It is important for candidates to recognise the limitations of devices used.
- Candidates should be taught to retain a vigilant and cautious approach when self-lining. Additional back-up strategies (e.g. knots below the device or rolling clove hitches) should be considered when undertaking tasks at height including transitioning from ascent to descent and vice versa.

\*A 're-belay' is adding an additional, independent anchor point to avoid the self-lining system being compromised. This may be due to differing directional loads, abrasion potential or to reduce rope stretch, for example.

A 'redirect' is adding additional anchor points into the self-lining system to ensure the rope is well positioned to support the participant.

**Assessors:**

A pre-emptive approach to safety is expected, with candidates recognising varied potential hazards in advance and mitigating accordingly.

If roped systems are used to assure safety they must be safe and effective. If specialist equipment is used it must be with consideration to the manufacturer's approved use. If a candidate is operating on the fringe of approved use, they should be aware of this and be able to explain why they feel its use is appropriate in the context, with agreement from course staff.

With regards to self-lining, if a candidate uses an alternative system to that trained which is safe, effective, and efficient it can be accepted. This may well include dynamic ropes and alternative devices. If they choose to do so, they should be carefully questioned.

## 10. Hazards and emergency procedures

### **Trainers:**

Given their experience level, candidates should be aware of and be able to mitigate against common hazards in a single pitch environment. As a result, a trainer's attention should be on the suitability of venues and routes to safely develop rock climbers, the evolving nature of activities and strategies to manage risk.

Warming up is recognised as key to injury avoidance. A good variety of warm up activities, for mind and body, should be introduced at training suited to differing contexts, participants and environments. It is ideal if warm up activities are related to the end goal.

As with Rock Climbing Instructor training, the overall emphasis should be on problem avoidance rather than problem solving. With consideration to the role, candidates should be trained to identify common issues along with simple strategies to avoid them. This is best drip-fed during practical activities and not as a session in isolation. This includes attention to both the climber's and belayer's behaviours during activities. Incidences are less likely to occur if the instructor maintains a vigilant and cautious approach.

A slow and steady approach to lead climbing should be endorsed with varied practice throughout. It is expected that course staff will encourage the use of bouldering, top and bottom roping and ghost roping, for example, to develop and refine key skills before undertaking lead climbing, if at all. Trainers should cover how to recognise key indications that participants are not ready, how to explain this positively to the participant and provide alternative appropriate tasks. The importance of the decision to allow lead climbing or not, should not be understated.

Despite the emphasis being on avoidance, trainers should cover simple strategies to handle common problems which may occur when developing rock climbers. Given the terrain is identical to that of the Rock Climbing Instructor, strategies to solve problems will likely be transferable in most cases, including when teaching lead climbing. Complex strategies, such as counterbalance abseils or hoists for example, should not be trained.

Use of devices with a guiding function should be introduced on courses, including simple strategies to protect both climbers (if applicable), release the rope, including when loaded, and lower in a controlled manner. Given the context, hoists should not be covered on training.

Trainers must stress that there is increasingly less an instructor can practically do to influence outcomes once participants are leading. The importance of detailed preparation and consolidation to reduce risk should therefore be strongly endorsed. If an appropriate amount of preparation has been completed, a participant's first lead should be enjoyable, with few issues necessitating intervention.

In the unlikely event of a participant becoming stuck, unable to continue or looking likely to fall whilst on lead, consideration should be given to the following possible interventions;

- Enhanced dialogue.
- Placing gear and clipping the rope in, above the participant's head, on their behalf.
- Using a top rope.
- Standing back and allowing the fall. Note: this does assume belayer competence in holding a fall.
- Temporarily attaching themselves to the climber.

The context and potential issues of using any of the above should be discussed.

Temporary attachment to a participant whilst self-lining should be considered the absolute last resort as the practice is commonly unnecessary and can easily compromise the safety of the instructor and the participant. To that end, minor attention should be given to it on training. If introduced on training, the context will be to temporarily assure safety rather than facilitate extraction. Snatch rescues are therefore not appropriate and should not be taught on training nor be used on assessment.

**Assessors:**

Assessors should present scenarios that enable candidates to demonstrate an awareness of specific hazards when developing rock climbers (including lead climbing) and be able to mitigate against them. Such mitigation should be evident throughout course attendance. Candidates could be tasked to review the suitability of a given venue for particular participants as a way for the assessor to gauge their knowledge.

Assessors should use scenario-based approaches to set tasks which require the candidate to make judgements in a realistic way. Reviewing the candidate's course of action followed by careful questioning will allow them to evidence their understanding and ability to avoid incidents. A vigilant and cautious approach must be evident throughout.

Structured planning tasks will support candidates to evidence a progressive, safe sequence of practical activities with carefully managed exposure to risk. Such activities should be

tailored to the individual participants and their goals and be practically implemented during assessment. The use of mock students is beneficial if well chosen and carefully briefed. Care must be taken to ensure those concerned do not unfairly influence the assessment process.

If activities undertaken with mock students naturally progress to lead climbing it may be appropriate for candidates to facilitate this. Before undertaking lead climbing it is expected that both belayer and climber have practically demonstrated competency to undertake the activity, understand the risks posed and the candidate is aware and can clearly evidence this. It is not appropriate to undertake lead climbing on assessment if there is cause for concern, irrespective of whether the risks can be managed. The candidate's decision-making is key in this regard.

Assessors should periodically drip feed common problems into practical tasks rather than deliver a session in isolation. When doing so common scenarios should be given rather than request specific techniques be demonstrated.

Candidates should be able to solve problems using simple techniques, the majority of which will have been introduced during Rock Climbing Instructor but still apply to this qualification. Although any solution can be accepted if safe and efficient, scenarios given should not demand complex techniques to solve problems such as snatch rescues, counterbalance abseils and hoists.

Problem solving tasks should not necessitate temporarily attaching themselves to a leader whilst self-lining. If a candidate chooses to do so, the technique used must be critiqued and decision-making carefully questioned.

## 11. Teaching and learning skills

### **Trainers:**

It is acknowledged that there are crossover themes between this section and sections 7 and 8.

It is key that candidates understand the role and scope of the qualification, which is centred on developing rock climbers rather than purely teaching lead climbing. To this end, candidates must understand the importance of remaining participant-centred in their approach.

Candidates should be taught to adapt their teaching style to effectively engage with a broad range of participants with differing backgrounds, levels of experience, mindsets and aspirations, for example. It should be recognised that profiling participants initially and analysing how they learn is fundamental to the success of the outcome. Subsequent teaching may involve varied verbal and non-verbal interaction depending on the individual concerned. Trainers should cover how candidates can recognise whether learning has taken place or not so they can react accordingly.

Given the developmental nature of the role, candidates should be trained to develop rock climbers with differing goals. After profiling participants, candidates should be supported to plan and implement suitable, practical activities to develop them, mindful of their aspirations. Such activities should be well paced to retain engagement.

It is expected that a variety of technical, tactical, physical and psychological elements can potentially be addressed, depending on the participant concerned. It is likely the training course's emphasis will be on technical and tactical elements. Trainers should support candidates to structure varied approaches and offer multiple strategies to achieve this.

Trainers should cover how to critically observe practice to identify where participant performance could be improved. Strategies to develop their observation skills should be included during training. Giving appropriate, effective and timely feedback is recognised as challenging especially when participants are practically engaged, so this aspect is worthy of time during training, centred on different situations and scenarios.

Candidates should be trained to facilitate a session review supporting participant's own self-reflection, either mid-session or as part of a final review. Regardless of the timing, trainers must offer a structure for reviewing that is suited to a range of participants to inspire and support future participation. Practical tasks are preferred, perhaps through peer to peer analysis and feedback.

Reflective practice is the key to improving teaching skills and candidates should be encouraged to approach more experienced instructors for feedback and to experiment by modelling different behaviours with groups. The Mountain Training Rock Climbing Development Instructor skills checklist and action plan are useful tools for facilitating this process.

**Assessors:**

Effective profiling should be evident as the foundation of appropriate practical tasks.

Tasks set should enable candidates to demonstrate they can identify significant and subtle weaknesses and interact in a positive and inspirational manner to improve performance towards the participant's individual goals. Candidates should be able to recognise when learning is successful or not and intervene appropriately. Technical, tactical, physical and psychological themes may be referenced, but delivery should be centred on developing technical and tactical competence. Tasks set should include varied practice.

Critical analysis will inform a candidate's review of performance. Reviews should take place in partnership with the participant supporting their own self-reflection. Feedback should be person-centred, creating specific opportunities for further development and fostering independent and autonomous learning.

Given the person-centred approach, mock students will likely be required to conduct fair assessment although peer to peer analysis may be appropriate in some cases. Prior planning tasks should ensure practical course time is well used.

## 12. Access

### **Trainers:**

Given the experience level of the candidates, their knowledge of access should be well established.

Recognising the stewardship responsibility when instructing, candidates should be taught to always role model good behaviours to participants. In doing so they may need to pass information to others. If knowledge is well established, course staff could place the training emphasis on how best to do this and how candidates can instil positive behaviours when instructing.

Referencing information online when accessing venues, integrated within a planning exercise to choose venues or discussion during activity, is an ideal way to cover content on training.

### **Assessors:**

Assessment of competence might centre on planning tasks when choosing appropriate venues or through discussion during practical activity.

Although the ability to teach this knowledge is not a specific requirement, candidates should be very experienced in a single pitch environment, so if questions or opportunities arise through interactions with mock students, they should be able to embrace them.

## 13. Conservation

### **Trainers:**

Trainers should take opportunities to deepen and refine candidates' knowledge of the environment and conservation throughout the course and encourage them to share their knowledge with their peers.

### **Assessors:**

Candidate knowledge of relevant conservation topics can be assessed through discussion with course staff and mock students, with particular emphasis on how they enthuse, inspire and engage when undertaking practical activities.

## 14. Etiquette and ethics

### **Trainers:**

Rock Climbing Development Instructors will be looked upon as experts operating in rock climbing environments, thus their conduct, etiquette and interaction with the environment and others is very important.

The development of rock climbers may demand use of key bouldering venues and routes and additional time to complete tasks. Given the pressure on these environments, candidates should be taught to maintain a respectful and positive demeanour when undertaking activities. 'Hogging' routes, or fixing lines down adjacent routes for extended periods, for example, is to be discouraged. Candidates should be taught to remain flexible in their approach and plan multiple options to address a range of eventualities.

Although the main activities will centre on rock climbing, the qualification enables candidates to operate in climbing walls to develop climbers and teach leading. Candidates should therefore be aware of the facilities and their own responsibilities to manage safety along with policies to support their use. This will likely differ from facility to facility.



Minimal time should be required to train these syllabus areas given the candidate's experience. General discussion and research tasks may be the best approach.

**Assessors:**

General questioning, scenario-based tasks and observing a candidate's general attitude to others whilst undertaking practical tasks is likely to be the best way to facilitate assessment.

