

# NATIONAL GUIDELINES FOR CLIMBING AND WALKING LEADERS >

## 5th Edition

Advice on good practice for anyone with a responsibility for climbing, walking and mountaineering related activities, and encompassing the principles of safety management



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National Guidelines for Walking and Climbing Leaders

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## PREFACE >

Adventure activities can provide exciting, motivating and very real contexts for people to develop their skills, awareness and understanding. Society has to balance the risks that people face in these activities with the very real benefits of their experiences. Mountain Training believes that properly managed risk activities help educate people to manage risk, and when guided by competent leaders, young people and adults can achieve a great deal both personally and socially in the group experience. However, the mountaineering community recognises that hill walking, climbing and mountaineering carry a danger of personal injury or death. Participants in these activities should therefore be aware of and accept these risks and be responsible for their own actions and involvement.

## THE REAL RISK >

This document aims to assist individuals and organisations to ensure that these introductions to the outdoors are safe and enjoyable. Previous estimates by the Adventure Activities Licensing Authority help put the real risks into context by estimating that each year schoolchildren take part in seven to ten million days of adventure activities and the Scouts estimate that they have half a million members participating in these same activities. From June 1996 to July 2013 49 pupils died whilst on school visits. That's an average of less than 3 pupils a year, but includes natural causes, road traffic accidents and a number of lesser accidents and incidents. Many of these incidents could and should have been avoided.

## STANDARDS >

Clear standards have been set in this document to ensure that risks are identified and activities well managed. The ability to involve participants in these activities and so develop their levels of responsibility, communication and awareness of others forms part of these standards. Leaders may also be able to develop positive attitudes and values, help the group reflect on experiences and so maximise any learning opportunities. Mountain Training defines minimum safety and environmental standards but is equally committed to the development of best practice for leaders i.e. raising standards where these need to be raised and sharing new ideas. While it is clear that the majority of providers and leaders operate in a highly responsible and considerate way, there is, and always will be, scope for improvement.



The mountains and uplands of the United Kingdom and Ireland provide a wealth of opportunity for educational and recreational use. However, the use of these magnificent natural resources is not without potential hazard and risk. The volume of people using the hills, mountains and crags has grown over the years and continues to do so, while at the same time there have, unfortunately, been a number of incidents. Some of these have been serious, including some involving young people, and have resulted in tragic and sometimes unnecessary loss of life. Many of these incidents could and should have been avoided. While some of them were high in the mountains (the Edinburgh School group on Cairngorm in 1971, the Scout fatality on Snowdon in 1999) others were on moorland (the death of a girl on Dartmoor in 2007) or during low level activities (the drowning of two Leeds schoolgirls while river walking in Stainforth Beck in 2001 and the drowning of one schoolboy in Glenridding Beck in 2003). This document aims to provide inclusive advice across the spectrum of walking and climbing activities, for leaders and their employers and managers.

These guidelines should not be used in isolation, but in conjunction with the guidance on safety and good practice provided by organisations such as the Health and Safety Executive and the relevant home nation education department or other organisational guidelines.

## A JOINED UP APPROACH >

The British Mountaineering Council (BMC), the Mountaineering Council of Scotland (MCofS) and Mountaineering Ireland (MI) welcome the work of Mountain Training in promoting awareness of mountain safety and drawing attention to the various Mountain Training awards. Mountain Training has prepared these guidelines for those in positions of responsibility and is in full agreement with the BMC, MCofS and MI in emphasising that they are not necessarily intended to be applicable to recreational climbers, mountaineers or hill walkers enjoying their activity as equals in the traditional mountaineering club fashion. The informal sharing of experience and skills between walkers and climbers is a fundamental aspect of our sport and further guidance is available to clubs through the mountaineering councils.



## MOUNTAIN TRAINING >

Mountain Training's awards and skills courses are nationally recognised and have been developed to educate and train people in the skills needed for walking, climbing and mountaineering.

Our awards and skills courses are run by approved Providers who are based all around the UK and Ireland. All staff directing the delivery of training and assessment courses will have completed a thorough selection process involving high level qualification, additional personal experience and a history of working on courses.

Mountain Training is run by a small staff team in the UK and Ireland. Many volunteers who represent the interests of outdoor and educational organisations are also involved and help to steer Mountain Training at a strategic level.

At Mountain Training we are constantly updating and refining our awards and ensuring the quality of our courses. Mountain Training also provides:

- Advice on safety for the outdoor sector
- A range of publications to support the activities
- Opportunities for continued personal and professional development through the Mountain Training Association





## PLACING THE SCHEMES IN CONTEXT >

### 1.1 Integration

While there are many qualified leaders operating successfully within the scope of their awards there are many others who either do not possess a national award, or who may be operating at the margins of what might be acceptable good practice or are unaware of the support available. This document is intended to help integrate local and organisation-based leader schemes, underpinned by the nationally recognised mountaineering qualifications. It also provides advice to individual leaders who may find themselves in non-standard situations.

### 1.2 Support for all

The National Guidelines aim to assist organisations, be they large or small, whose leaders may have limited experience, to operate in less demanding terrain within a safety management system. It does this by identifying the management systems required to oversee those progressing beyond a particular national award or who have yet to complete one.

### 1.3 Minimising duplication

Considerable integration has been achieved between the mountaineering awards. The National Guidelines are aimed particularly at integrating these schemes with various organisational validations. The aim of such a framework is to minimise duplication and enable individual leaders to be accredited for the training they receive during their career.

## CASE STUDY 1: MANAGING A CORRIDOR ROUTE

The Walna Scar track from Coniston to the Duddon Valley (SD 300976 to 233965) is a route that traverses the flanks of a mountainous area as it skirts the Old Man of Coniston and Dow Crag and goes up to the height of 606 metres. Whilst the land falling away to the south could well be classed as 'moorland' it is only the track itself which separates this area from the mountains and traverses broken ground between 500 and 600m. It therefore falls outside the accepted terrain for a Hill and Moorland Leader (formerly Walking Group Leader) and is assumed to be an area requiring a Mountain Leader award. It may however be possible for a Hill and Moorland Leader to work with groups along this route, within an appropriate safety management system. A suitably qualified and experienced technical adviser (usually a Mountaineering Instructor or Guide) would be able to identify the terrain immediately adjacent to the route as appropriate for Hill and Moorland Leader and might determine that the route finding demands for keeping to the route were not too high. It would be preferable for that adviser to have a current knowledge of the relevant Mountain Training awards as this would ensure their understanding of the various competencies included in those awards. Such an adviser might be able to evaluate the Walna Scar route and declare it as acceptable for Hill and Moorland Leaders although they might well put provisos upon such things as group type and size, weather conditions or prior experience. Another means by which the Hill and Moorland Leader may be introduced to work on this route would be through site-specific training whereby the technical adviser may well take potential leaders over the route to introduce them to the terrain, point out specific hazards and navigational decision points and may even assess their ability to cope with tasks en route. Such training and assessment would give the employer and the technical adviser a much greater degree of assurance about the capability of the Hill and Moorland Leaders working on this route.

Case study provided by Andy Say, Mountain Training England

## 1.4 Competence

According to the Health and Safety Executive there are four ways to demonstrate the competence of leaders, namely: to hold the relevant national qualification, to hold an equivalent qualification, to have received appropriate in-house training or to be competent through experience (see 4.1 Four ways to demonstrate competence). Mountain Training endorses this view recognising that national awards are the key components in such an approach.

## 1.5 National awards

There are currently fourteen established mountain related qualifications in the UK and Ireland for leaders, instructors and guides (see 5.1). These awards are widely used by a diverse range of organisations and individuals and are the benchmark standards for mountaineering activities. Alongside their universal recognition by the mountaineering councils and training boards of the UK and Ireland they are recognised by the Health and Safety Executive and other government organisations. A number of these qualifications also have international recognition and applicability (see Mountain Training website for further details).

## 1.6 Other schemes

There are other schemes of training including internal military leadership programmes and a variety of locally administered programmes. These are outside the scope of this document.

## 1.7 Advice

Mountaineering activities range considerably: from short walks on local moorland to scrambling over long rocky ridges and from climbing on short man made walls to expeditions to the very highest summits. The fourteen national qualifications currently available span this activity focusing on specific disciplines and contexts, such as the Winter Mountain Leader. Because of the irregular nature of mountains the lines between each award may be blurred. Leaders or their managers who wish to clarify the scope of an award should seek advice from a suitable technical adviser (see 6.3). This adviser may be able to provide appropriate further in-house training and validation to enable a wider range of activities. Where there is any doubt advisers should contact Mountain Training.

## 1.8 The water margin

The other area that often requires additional support is the border between land and water-based activities. Mountain Training has worked closely with the Adventure Activities Licensing Authority, the British Canoe Union, the Department for Education and Skills and the Health and Safety Executive to produce various guidance notes. These can be found here: [www.mountain-training.org/walking/other/downloads](http://www.mountain-training.org/walking/other/downloads).

## CASE STUDY 2: GIRLGUIDING UK WALKING SCHEME

In late 1999 and early 2000 Girlguiding UK (then known as the Guide Association) spoke to Mountain Training Scotland about gaining approval for their walking scheme for leaders of Girlguiding UK groups in Scotland. This was followed by the distribution of the scheme draft to a small working party of Mountain Training Scotland members for comment. After responding to this consultation and using the Mountain Training Scotland 'Local Accreditation Schemes' booklet there were several meetings with representatives of Girlguiding UK and Mountain Training Scotland. Although the initial scheme was robust and well-constructed, a few suggestions were made and acted upon. These discussions were greatly helped by the fact that Girlguiding UK had a technical adviser who held the Mountaineering Instructor Certificate, was a Mountain Training Scotland Course Provider and was very familiar with the award schemes. The scheme was given Mountain Training Scotland endorsement in September 2001. This approval was for a three-year period after which the scheme was resubmitted to the Board. Should there have been any significant alterations to the scheme then this resubmission would have had to be sooner. When these discussions started Girlguiding UK also approached the other home nation boards for approval. It was decided that other Home Nation Boards would comment on the scheme to Mountain Training Scotland who would be the lead body for this matter. When Mountain Training Scotland granted approval, the other home nation boards followed suit. This situation was rather different from other local schemes as it was valid UK-wide, while other approved schemes were usually for a restricted area as well as for an organisation. However, the Girlguiding UK scheme was robust and had the back up of appropriately qualified and experienced technical advisers making this wider remit possible within the concept of a local scheme.

Case study provided by Steve Spalding, Mountain Training Scotland



## THE ASSESSMENT AND MANAGEMENT OF RISK >

### 2.1 Duty of care

Leaders owe a duty of care to others who are closely and directly affected by their actions. Leaders, and those who deploy them, need to bear in mind the possible consequences of those actions and/or advice. This duty of care is greater for leaders who work with young people or novices and may reduce when responsible for more experienced groups. In the latter case the group members may be more able to take responsibility for their actions i.e. they can consent to participating in an activity from an informed point of view and the duty of care may be considered to be reciprocal.

### 2.2 Matching objectives to participants

From records of incidents and accidents it seems evident that many of them could and should have been avoided. Many occur as a direct result of poor planning and management and an inadequate appreciation of the risks involved, in particular the failure to assess objectively the needs of the individual participant in relation to the activity, choice of venue and prevailing conditions. Mountain Training recognises the need to ensure that all those who are responsible for supply and delivery of activities must take account of the welfare of the people in their care.

### 2.3 Planning

It is strongly recommended that the following principles be adopted during the planning process:

- Why? Identify the reasons for undertaking an activity.
- Who? Identify the group's or individual's specific needs, taking into account experience, age, ability and interest.
- What? Identify the type of activity and level of participation consistent with the established needs of the participants.
- Where? Identify and use appropriate venues that are suited to the established needs of the participants.
- When? Identify the appropriate time or occasion and maintain the flexibility of operation with regard to prevailing conditions, established needs and abilities of the participants
- How? After initial consideration of the above, and before making final arrangements, consideration should be given in detail to the way in which the activity is to be organised and executed, in order that the aims of the activity can be achieved and potential hazards identified and dealt with appropriately

## **2.4 Personal responsibility**

Challenge and adventure are never entirely free of risk. Learning to have regard for the safety and welfare of oneself and others is an aspect of the personal development of participants to which good instruction and leadership will make an important contribution. However, there must always be an acceptable framework of safety.

## **2.5 Experience and familiarity**

Awareness of danger and potential hazards is developed through experience. Leaders need to be able to anticipate the possible risks involved in using particular environments. Risks will be minimised if leaders are familiar with members of their group, their strengths, weaknesses, personalities and previous experience.

## **2.6 Volunteers**

By tradition within the United Kingdom and Ireland, leaders providing an outdoor mountain-related experience are often drawn from the voluntary sector. Such leaders will not always have the support of an employing organisation. In such cases the principles of good practice contained within this document are equally valid, although it is recognised that in some circumstances aspects of the document will not be applicable. However, simply being a volunteer will not exclude any individual from meeting the requirements in terms of appropriate training and competencies commensurate with the task.

## **2.7 Risk assessment**

Risk assessment is a continuous process that should start before any activity takes place. Reassessing the risks will be necessary with every change such as in the weather or itinerary or in the event of a particular incident. This reassessment should also take account of the strengths and weaknesses of the individuals within the group.

An assessment of benefits versus risks is made as follows:

- Identifying hazards
- Deciding who might be harmed by them
- Comparing the likelihood of harm against the identified risk
- What safety measures need to be in place to reduce the risks to an acceptable level?
- Can the group leader put the safety measures in place?
- What steps can be taken in an emergency?
- Formally review the assessment from time to time

## **2.8 Responsibilities and principles of a safety management system**

The responsibilities within any safety management system can be divided between three groups: the provider, the leader and the participants (customers, parents or guardian).

### **2.8.1 The provider checklist**

The provider should be responsible for ensuring that:

- The individuals or leaders are competent for the task and are deployed within the limitations of their personal experience and skills
- An appropriate document detailing the organisation's policy on safety and procedures is understood by the leader involved

- Information about safety policy, procedure and practice is available to the participant (or parent or guardian in the case of minors) prior to commencement of the activity †
- Participants are informed of the qualifications and experience of the leaders deployed
- The ratio between participant and leader ensures adequate control and safe conduct of the activity
- The participant is assessed as being fit for the proposed activity, as far as is reasonably practicable
- All equipment used is well maintained and appropriate for the purpose to which it will be put
- In the event of any serious incident or accident the organisation's accident reporting procedure is followed which may, if appropriate, involve informing the Health and Safety Executive or equivalent body
- Adequate and appropriate insurance is provided
- The region or specific venue for any activity is appropriate to the group's needs, and the environment in which it will be carried out is appropriate

### 2.8.2 The leader checklist

The leader charged with the safe conduct of the party should be responsible for:

- Ensuring that the provider's or employer's safety policy, where applicable, is adhered to throughout (this is an obligation under the Health and Safety at Work Act)
- The operational safety and overall welfare of the participants in his/her charge
- Ensuring that they operate within their competence and in a manner appropriate to the participants' experience and ability
- Informing the provider or employer if the ratio of leader to participants is such that the safe conduct of the party is in question
- As far as is reasonably practicable, ensuring that the ability and health of participants is suited to the activity proposed. In such cases where doubt exists the leader should be free to apply discretion and amend the activity accordingly
- Ensuring that the equipment provided by the provider and any personal equipment used by participants is suitable for the task and is in an acceptable condition
- Providing participants with information appropriate to the activity concerned, together with adequate instruction
- Providing participants with appropriate information on access and environmental issues together with adequate guidance
- Ensuring that every effort is made to protect the environment being used
- Showing due regard for other users of this environment
- Drawing to the attention of participants relevant codes of practice, club structure, ethics and the role of relevant governing bodies as appropriate

### 2.8.3 The participant, customer, parent or guardian checklist

The participant, customer, parent or guardian should, as far as is reasonably practicable, take responsibility for ensuring:

- That the activity offered suits participants' needs, expectations and capabilities
- That participants' actions conform to any safety guidance given during the process of instruction or supervision
- That any distress or concern during, or resulting from, the activity is drawn to the immediate attention of the leader in charge
- That they are aware of the recognised risks and hazards associated with the activity and are prepared to accept them
- That the equipment and clothing used are suitable for the activity and worn as directed
- That due regard is given to care of the environment and other users, and that the relevant code of conduct for the activity or relevant to the particular environmental circumstances is adhered to

† Information should be made available to participants prior to the commencement of any activity. In the case of minors, parents or guardians should be informed and approval gained prior to any contract or booking.



## SAFETY PROCEDURES AND OPERATIONAL GUIDANCE >

### 3.1 Safety procedures

It is good practice for the provider to prepare a clear statement outlining the safety policy to be utilised. This policy statement can then be made available to all user groups.

Such a statement should include:

- The training and qualifications of the leader (minimum standard to be deployed)
- A clear statement on complaints procedures
- The position regarding insurance cover of the provider, leader and participant

### 3.2 Operational guidance

The provider of service is responsible for the provision of operational guidance, which will be used by any deployed leader. Such operational guidance will be made available to leaders and such guidance should be understood and accepted by them prior to their taking part in any instruction or activity. Normally guidance of this nature will primarily be for the benefit of the leader and should be consistent with nationally accepted standards of good practice.

### 3.3 Flexible guidelines

In providing guidelines, precise rules are not feasible since they may fail to cover every important aspect. It is, however, essential to provide clear statements of principle, which give a degree of flexibility to meet the often varying conditions.

### 3.4 Operational guidelines

Operational guidelines should be based on a realistic assessment of the risks involved and should include the following considerations:

- The safety and welfare of the participant
- The issue and use of essential technical and safety equipment both for the leader and participant
- Planning and objective assessment regarding the leadership task
- The limitations (where appropriate) of the leader role
- A clear statement of the ratios between leader and participants relative to the type of activity and venue to be utilised
- Risk assessment as outlined in a previous section

### 3.5 Insurance guidance

Insurance must be considered for provider, leader and participant and may include:

- Public liability
- Employers' liability
- Professional indemnity
- Personal accident

The most appropriate policies are likely to be found through the associations and mountaineering councils.





## STATEMENTS OF COMPETENCE - TAILOR MADE OR OFF THE SHELF?

### 4.1 Four ways to demonstrate competence

According to the Health and Safety Executive there are four ways to demonstrate the competence of leaders. These are:

- To hold the relevant qualification
- To hold an equivalent qualification
- To have received appropriate in-house training
- To be competent through experience

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

### 4.2 The value of continuing experience

Whatever method is used to determine the leader's competence it must be supported by current, relevant experience. All Mountain Training awards are experience-based and should always be supported by current logged experience. Leaders should ensure that they have appropriate experience for the people they are working with, for the terrain in which they are planning to operate and for the activities they plan to undertake. Mountain Training's DLOG (Digital Logbook) is a way to log experience and the associations are a way to access continued personal/professional development opportunities.

### 4.3 In-house training

The site specific nature of most in-house schemes is the principal reason for selecting this approach. Limited experience and lack of time are also common reasons for considering in-house training and these will have to be balanced against an off the shelf solution that stays with the individual wherever they are employed. The other concern with in-house training is that the trainers or participants may be isolated from best practice and denied a national perspective. For these reasons it is essential that appropriate, nationally qualified staff deliver in-house training wherever possible.

## CASE STUDY 3: LOCAL SCHEME & EXEMPTION FROM MOUNTAIN LEADER TRAINING

Myles Christie is a science teacher at Bangor Grammar School in Northern Ireland. He spends a large part of his time working with students, developing hill walking skills as part of the Duke of Edinburgh's Award. As a teacher, Myles could take advantage of the South Eastern Education and Library Board (SEELB) hill walking leader training. Over a number of years, he gained Level 1 and Level 2 within the scheme. This accredited him to lead groups throughout Northern Ireland within specific guidelines and within the management structure of the scheme.

Myles operated in this way for a number of years. During this time he developed his own personal skills, as well as his leadership and group management skills. In late 2001, he completed Level 3 of the SEELB hill walking scheme. He then applied to Mountain Training Northern Ireland for exemption from Mountain Leader training, and subsequently passed the Mountain Leader assessment in April 2002.

Myles is one of a small number of people annually who complete the Mountain Leader award in this way, through recognition of the SEELB scheme by Mountain Training Northern Ireland.

Case study provided by Trevor Fisher, Mountain Training Northern Ireland

Knowledge and experience both run along a continuum while the standards of any national award are a single point on this line. Further training events and opportunities to review new initiatives are valuable components in the continuing development of any leader.

#### **4.4 First aid**

First aid and incident management are essential skills for every leader and the fourteen national awards require a current first aid qualification. The minimum requirement for the CWA is a one day course or eight hours of instruction but for all other awards training must involve at least two full days or sixteen hours of instruction and include an element of assessment. Candidates are further expected to undertake such additional elements of first aid training as are consistent with their work in wild and remote country, including emergency assistance and evacuation techniques. It is the responsibility of award holders to evaluate their likely work and the type of situations that they can reasonably expect to encounter and to maintain current appropriate first aid training and qualifications.

#### **4.5 Personal competence training**

Apart from first aid training courses there are no personal proficiency awards in the UK that are essential components of any leader training scheme. In Ireland, a Mountain Skills assessment must be passed prior to attending Mountain Leader training.

Mountain Training's Hill & Mountain Skills Scheme is nationally accredited and has been developed for novice hill walkers who are looking to gain personal skills training. The scheme does not include any element of assessment. The National Indoor Climbing Award Scheme (NICAS) and the National Indoor Bouldering Award Scheme (NIBAS) have been developed by the Association of British Climbing Walls Training Trust to promote climbing development and accredit individual achievement on artificial structures. There is also a wealth of high quality training available for individuals, delivered through the Mountaineering Councils, independent mountaineering instructors, guides and leaders and a wide range of outdoor centres. Individuals who have received training from mountaineering instructors or guides in particular are encouraged to refer to this training when applying for exemption from training for certain awards or to demonstrate their commitment to further training.

#### **4.6 Military schemes**

The military operate a range of leader training schemes designed specifically for their needs, and some of their training courses have been closely aligned to the Mountain Training awards. As a result, the Joint Services (JSMTTC and JSMTW) are approved providers of Mountain Leader, Winter Mountain Leader and Single Pitch Award training and assessment courses and while military personnel may undertake civilian accredited training and assessment courses, they must still register with Mountain Training and meet the prerequisites for each stage. Existing holders of military awards may be eligible for exemption from relevant civilian training courses (see 5.6) but will have to register and take an appropriate assessment course if they wish to gain civilian recognition.

## **CASE STUDY 4: SITE SPECIFIC ENDORSEMENT BY TECHNICAL ADVISOR**

A secondary school in Leicestershire had received funding to improve sports facilities at the school. One of the elements of the new sports hall was a climbing wall. The head of PE at the school initially contacted Mountain Training to register six of the school staff on the Climbing Wall Award scheme. Mountain Training advised the school to look at the possibility of site specific training and accreditation. The school employed a Mountaineering Instructor Award holder with experience of technical advisory work in climbing walls who was able to give some input during the planning stages on equipment and other matters.

After the construction of the wall the technical advisor drew up detailed operating procedures and a risk assessment. All staff were trained in these procedures and what to do in the case of any problems; they were finally assessed as competent by the advisor and formally 'signed off' by them. The technical advisor recommended that two of the staff, who had a background in climbing, register for the Climbing Wall Award. One of the staff was able to successfully complete the Climbing Wall Award assessment within six months, enabling pupils from the school to be taken to local commercial walls as progression from their regular weekly sessions.

### 5.1 Award development

Since 1964 Mountain Training has been pivotal in promoting and developing mountaineering skills and qualifications across the United Kingdom. Nearly one hundred and fifty thousand people have registered on our schemes during our first 50 years, which began with the Mountain Leadership Certificate. Our continually expanding and improving range of qualifications now includes twelve leadership schemes and a skills scheme. Our schemes are reviewed periodically to make sure they meet the ever-changing needs of the mountaineering community and the general public.

### 5.2 Registration costs

Candidates expect consistent quality of delivery and an equitable standard at assessment. They also rely on Mountain Training to represent them, to develop leader training with the changing times and to maintain records of their training and assessment. It is for these reasons that in all schemes candidates pay a fee to register for each award and their providers pay a standard yearly fee plus a levy on each training or assessment course that they run.

### 5.3 The need for experience

Personal experience is a condition of entry for all of the national awards, along with a desire to lead, supervise or coach others. In the Republic of Ireland there is a mandatory personal proficiency course that precedes Mountain Leader training and in the UK many providers deliver personal skills courses in all aspects of mountaineering as well as Hill & Mountain Skills courses administered by Mountain Training. There is also a National Navigation Awards Scheme with strong links to British Orienteering and the Royal Institute of Navigation.

### 5.4 Trainees

The process of registration, even amongst the higher level awards, is a paper exercise and does not imply any particular level of competence. Training courses involve no formal assessment and should not be used as evidence of competence. Trainees can gain experience in a wide range of managed positions within organisations where the responsibility for their deployment lies with a suitably competent individual.

### 5.5 Exemption and the fast track to awards

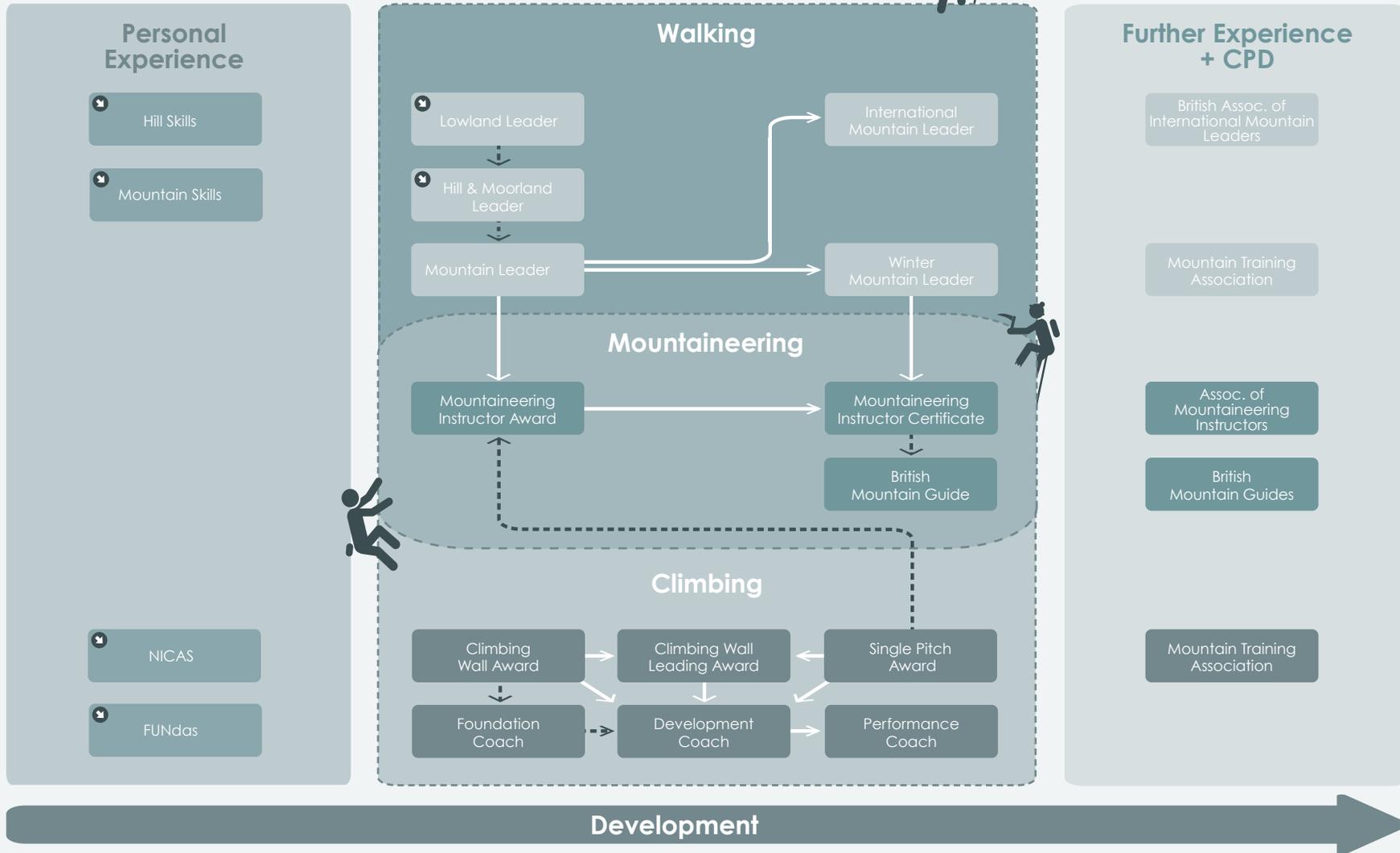
Exemption from training is possible for the entry level awards, although most people value any additional opportunity to develop their skills and knowledge in the company of fellow leaders and their trainers. It would be exceptional but possible for a suitably experienced individual to gain the Mountaineering Instructor Certificate in just under two years, but any such person would be wise to take each step one at a time.



## 5.6 National schemes in walking, climbing and mountaineering

TITLE	AWARDING BODY	SCOPE	VALIDITY	ENTRY REQUIREMENTS
LOWLAND LEADER	MTE, MTC, MTS, MTNI, BOS	Leadership of walking parties in lowland terrain	UK and Ireland	10 walks or completion of a Hill Skills course
HILL AND MOORLAND LEADER	MTE, MTC, MTS, MTNI	Leadership of hill walking parties in non-mountainous terrain	UK and Ireland	20 quality hill walking days
MOUNTAIN SKILLS (IRELAND)	BOS	Personal skills for the mountains	UK and Ireland	Previous hill walking experience
MOUNTAIN LEADER	MTE, MTC, MTS, MTNI, BOS	Leadership of hill walking parties in all mountain ranges in 'summer' conditions	UK and Ireland (the award has the approval of the UIAA under its model standards for voluntary leaders scheme)	UK: 12 months experience including 20 quality mountain days Ireland: First Aid qualification, Mountain Skills assessment
WINTER MOUNTAIN LEADER	MTS	Leadership of hill walking parties in winter conditions	UK and Ireland	The Mountain Leader award plus 20 winter quality mountain days
INTERNATIONAL MOUNTAIN LEADER	MTUK	Leadership of trekking parties in all non-alpine terrain, including easy snow-covered terrain of a gentle, nordic type	International	The Mountain Leader award, 20 quality international summer mountain days and 20 UK or international winter quality mountain days
CLIMBING WALL AWARD	MTE, MTC, MTS, MTNI, BOS	Supervision of climbing on purpose-built walls and structures. An additional module is available for supervising abseiling and climbing on structures	UK and Ireland	6 months climbing wall experience, 15+ climbs on purpose built climbing walls or structures
SINGLE PITCH AWARD	MTE, MTC, MTS, MTNI, BOS	Supervision of single pitch rock climbing and abseiling	UK and Ireland	12 months climbing experience, 15+ trad routes
CLIMBING WALL LEADING AWARDS	MTE, MTC, MTS, MTNI, BOS	Teaching of lead climbing on purpose-built walls and structures	UK and Ireland	Climbing Wall Award or Single Pitch Award, 50+ indoor routes, 25 at French 6a and 20 sessions as a CWA or SPA
COACHING SCHEME	MTUK	Coaching climbing movement skills	UK	6 months climbing experience
MOUNTAINEERING INSTRUCTOR AWARD	MTUK	Instruction of mountaineering and rock climbing activities. Able to train, assess and advise on all aspects of UK mountaineering except in winter conditions	UK and Ireland (the award has the approval of the UIAA under its model standards for voluntary leaders scheme)	30+ VS multi-pitch routes, 20 post-Mountain Leader quality mountain days in sole charge of a group
MOUNTAINEERING INSTRUCTOR CERTIFICATE	MTUK	Instruction of summer & winter mountaineering & rock and ice climbing. Able to train, assess & advise on all aspects of UK mountaineering	UK and Ireland	The Mountaineering Instructor Award, the Winter Mountain Leader award, 20 Grade II/III+ routes and 20 winter group leading days
BRITISH MOUNTAIN GUIDE	BMG	Guiding and instruction of all mountaineering activities, including glaciated areas, summer and winter. Trainees are deemed equivalent to MIA, aspirants to MIC	International	UK and Alpine experience 50+ E1 5bs, 50 IV/Vs, 20+ major alpine summits (10 TD+), 30 days ski mountaineering (15 linked)
HILL & MOUNTAIN SKILLS (UK)	MTE, MTC, MTS, MTNI	Personal skills training for the hills and mountains	UK and Ireland	No experience required to register

# Qualification Pathways



Key



Recommended Progression



Direct Entry

## 5.7 Assessment

There is no exemption from any of the assessment courses. Mountain Training relies on highly experienced assessors to get the best results from leaders (approximately 75% of all candidates pass first time).

## 5.8 Continuing personal development

The awards are given primarily on the basis of technical and group management skills. These skills are verified at the time of assessment and continuing relevant experience is necessary to maintain them. None of the awards have a formal revalidation process but some do require the award holder to be a member of an association with defined requirements for continuing professional development. For the majority it is the responsibility of the individual award holder to keep themselves up to date in the areas in which they are involved. This is best achieved through a combination of further personal experience and attendance at relevant training courses and workshops. As well as providing professional representation the Associations provide accredited continued professional development opportunities for its members.

## 5.9 About the associations

The Mountain Training Association (MTA) is a membership organisation providing support and development opportunities for all candidates and holders of the Mountain Training awards. Members of the Mountain Training Association are committed to continued personal development, demonstrating the benefits of ongoing experience and enhanced skills, so not only do they hold a nationally recognised qualification, they are up to date with good practice. Find a member at <http://www.mountain-training.org/find/find-a-leader>

The Association of Mountaineering Instructors (AMI) is the representative body for professionally qualified Mountaineering Instructors in the UK and Ireland. AMI is committed to promoting good practice in all mountaineering instruction. All AMI members adhere to a professional code of practice and undertake continuing professional development training. Look for the AMI logo as assurance of high quality instruction. AMI members are highly experienced mountaineers who have undergone rigorous training and assessment to qualify under Mountain Training's Mountaineering Instructor scheme.

The British Association of International Mountain Leaders (BAIML) is a full member of the Union of International Mountain Leader Associations (UIMLA) and looks after the professional interests of International Mountain Leaders (IMLs) in the UK. UIMLA is an internationally recognised mountaineering organisation whose leadership qualifications are accepted outside their country of origin. Mountain professionals wearing the badge and carrying the carnets of this organisation have been trained and assessed to the exacting requirements of the internationally respected qualification it represents.

British Mountain Guides (BMG), is the national association that trains and assesses mountain guides in all forms of climbing, mountaineering and ski mountaineering. It sets professional standards for services offered by BMG members and promotes safety, enjoyment, and good practice in climbing and mountaineering. BMG is a member of the International Federation of Mountain Guide Associations (IFMGA), which is the body that coordinates the standards and mutual recognition of the twenty-six national mountain guide associations. A British Mountain Guide is an IFMGA Guide, which put simply, means an internationally qualified guide with the knowledge and skills to lead parties in the world's most challenging mountain environments.

## 5.10 Providers

Suitably qualified and experienced individuals and organisations who wish to organise and run training and assessment can obtain approval

from Mountain Training. The appropriate board will monitor these courses, ensuring parity of standards throughout the United Kingdom and Ireland.

### **5.11 First aid**

All award holders must possess a valid first aid certificate, the standard and level of such certification being laid down for specific awards. However, some employers may feel that a higher level of certification may be required depending on the work being undertaken.

### **5.12 Age**

The minimum age for attending a Hill Skills or Mountain Skills course is 14. To register for the Coaching scheme, candidates must be at least 16 and assessment may not be undertaken until 17. For the Climbing Wall Award, candidates must be 17, (18 in Ireland) although assessment may not

be undertaken until 18. The minimum age to enter any of the other national awards is 18; there is no upper age limit. While it is fully understood that youth organisations are in a position to approve junior leaders below 18 this will always be within a safety management structure where participants, terrain and expectations can be managed. Under-age candidates seeking to enter a national award are encouraged to record their activities and to expand their personal experience and the opportunities they have to assist groups. In this way they will have a flying start when they enter their chosen scheme.

### **5.13 Equity**

Providers are encouraged to make provision for additional assistance to be given to candidates where required, although this must not compromise the overall standards required for a leader to be in full control of a hill walking or rock climbing group at all times.

### **5.14 Scope and operating limitations**

The scope of each award can be found in the candidate handbook of the respective award. Section 2.8 also outlines the respective responsibilities of the provider, the leader and the participant.

### **5.15 Management and deployment of award holders**

The responsibility for deployment and management of award holders and the judgement of the suitability of such individuals for other aspects of their employment lie with the employer or provider. Such deployment should take account of the recent experience and health of the award holder and include further training as necessary.

## **CASE STUDY 5: MANAGING TRAINEE MOUNTAINEERING INSTRUCTORS**

At Plas y Brenin National Mountain Centre a large number of talented climbers and teachers are employed to deliver a wide range of climbing courses. Each year a small number of instructors progressing through their Mountaineering Instructor Award work on rock climbing courses. The Centre manages the use of trainees by:

- Selecting talented, experienced climbers with appropriate training
- Induction to the working environment and ethos of Plas y Brenin
- Using an experienced mentor to give further practical training at suitable venues to be used for climbing courses  
Providing clear additional written guidance on best practice used by the instructors at the centre
- Deploying the trainees on courses where an experienced mountain guide or mountaineering instructor (i.e. experienced and qualified member of staff) directs a course and supervises the choice of venues and routes
- Providing additional support with practical observation and feedback from other senior members of staff
- This process is coordinated and managed by a senior member of staff (e.g. Director of Training) and this process is documented.

There are other organisations managing trainee mountaineering instructors and trainee mountain leaders in much the same way.

Case study provided by Martin Doyle, Mountain Training Trust

### **5.16 Self-employed leaders**

Holders of awards are sometimes self-employed and may offer their services directly to the public. In this case the leader has to assume the dual roles of award holder and manager.

### **5.17 Legislation**

It is assumed that each organisation or provider will produce operational procedures to suit their specific needs as required by the Health and Safety at Work Act of 1973 and, where appropriate, the Adventure Activity Licensing Regulations 1996. Organisations must also be mindful of the Disability Discrimination Act 1995, the associated Special Educational Needs and Disability Act 2001 and the Working at Height Regulations 2005.

### **5.18 Further Advice**

In making recommendations regarding the provision of instruction and assessment in respect of the schemes listed above, Mountain Training is anxious that there be no misunderstanding of the scope of such schemes. Advice on any aspect of the above schemes may be obtained from the relevant administrative agency.





## LOCAL, SITE OR ORGANISATION SPECIFIC SCHEMES >

### 6.1 Recording experience

Leaders within local, site or organisation specific schemes should be made aware of the national awards and encouraged to record their experience in a comparable format to the Mountain Training DLOG (Digital Logbook).

### 6.2 Climbing walls

For the purposes of this document, the term 'climbing walls' refers to structures that are purpose built for climbing activities. These may be sited indoors or outdoors and can vary enormously in scale and complexity. All should be maintained as a managed facility, with a clear chain of responsibility for upkeep of fixtures and fittings. All of Mountain Training's climbing awards (Climbing Wall Award, Single Pitch Award, Climbing Wall Leading Award, Mountaineering Instructor Award, Mountaineering Instructor Certificate) include climbing walls as a working environment, and some authorities may choose to administer a local scheme of training and assessment.

It should be stressed that although the Climbing Wall Award and Single Pitch Award deal with relatively simple climbing situations and many technical issues are very similar, they do have very different syllabi. As an example the emphasis within the SPA is on the use of natural protection, building safe anchors, crag etiquette and safety issues in the outdoor environment, whilst the CWA is aimed more towards the management of activities such as bouldering and coaching movement skills in what can be a busy and very noisy environment.

### 6.3 Technical advice

Anyone holding a national award has been judged to be competent to operate within the scope of that award at the time of passing the assessment and doesn't necessarily need additional advice, though they may take the opportunity to attend further training events such as those provided through the associations. Technical advisers are more qualified and experienced individuals who can assist leaders in particular with regard to the scope of their award. For example, a Mountain Leader who is concerned about forecast wintry conditions should consult a Mountaineering Instructor Award holder who is also a Winter Mountain Leader, a Mountaineering Instructor Certificate holder or a Guide for guidance on the boundary between winter and summer. Where an organisation is contemplating a local, site or organisation specific scheme then appointing a technical adviser will be a critical part of the process.



## THE MARGINS OF WALKING AND CLIMBING >

### 7.1 The name of the game

Walking: summer and winter, walking and trekking on hills, moorland and mountains.

Climbing: roped, free climbing and bouldering on rock faces, ridges and indoors.

Mountaineering: the ascent of hills and mountains where the use of technical equipment is essential for either hands or feet.

In addition, mountaineering is often used as a more general term to describe all of the above.

### 7.2 Other sporting activities

The nearest neighbours to our activities are perhaps canoeing and caving as well as (in certain respects) gymnastics. The boundary between water and rock is one which has caused some confusion and has been the scene of several accidents in recent times including the multiple drownings in Switzerland in 2000, in Stainforth Beck in 2001 and on Dartmoor in 2007. Some very useful documents have emerged from these incidents and guidance on combined rock and water activities can be found on our website ([link](#)).

### 7.3 Summer and winter

Mountain Training has a seasonal approach to hazards and the skills needed to deal with them. Several of the awards use the terms summer and winter and these are defined as:

- Winter – when winter conditions, including snow and ice prevail or are forecast and the use of axe and crampons are an aid to progress and safety. This cannot be defined by a portion of the year
- Summer – any conditions not covered under winter

## APPENDIX I GLOSSARY >

AAALA	Adventure Activities Licensing Authority
Approval	Mountain Training grants approval, on a yearly basis, to providers of its training and assessment courses. For details contact Mountain Training
Assessment	In mountaineering the assessment of any individual's competence is carried out by observation and questioning of leaders in realistic, practical situations and supported by written testing and log-book based reviews of prior training and experience
Assistant	Leaders may choose to operate with the assistance of another responsible adult (see 5.4 Trainees)
Award	Leader or instructor qualification, which demonstrates that an individual, at the time of their assessment, was competent to the required level. All awards rely on personalised log books to record the continuing experience of the leader
Carnet	A certificate of competence issued to members of British Association of Mountain Guides and British Association of International Mountain Leaders
Coach	A generic sporting term for the role taken by any leader, instructor or guide in mountaineering activities. The term is sometimes applied to performance-enhancing rock climbing instruction, particularly when it is delivered at a climbing wall or similar defined environment
Hazard	Anything that can cause harm
Guide	In mountaineering terms this is not only the title of one of the national awards (British Mountain Guide) but is also used to describe a style of leadership that emphasises client care
Instructor	The title of two national awards (Mountaineering Instructor Award and Mountaineering Instructor Certificate) and a generic term for any group instructor/leader. It is often used to describe a style of leadership that emphasises learning and the development of skills and knowledge
Leader	In mountaineering this is not only the title of four of the national awards (Walking Group Leader, Mountain Leader, Winter Mountain Leader and International Mountain Leader) but is also used as a generic title to describe anyone in a position of responsibility
Professional	Someone who behaves in a thorough and conscientious manner, or someone who is paid for their services, or someone who is bound by a code of conduct and is overseen by a professional association
Provider	The individuals or organisation approved by Mountain Training to deliver its training and assessment courses or a person who is required to hold a licence under the Adventure Activities Licensing Scheme
Remote Supervision	Sharing responsibility with the members of a walking group so that the leader supervises activities at a distance
Risk	The chance, great or small, that someone will be harmed by a hazard

Single Pitch	A climb that is less than one rope length and is completed without the need for intermediate stances
Supervisor	As well as a generic term for a manager who oversees other people it is sometimes used in single pitch rock climbing as the term for a group leader
Technical Adviser	A competent person that provides advice to leaders and organisations, based on their experience, training, qualifications and their knowledge of local issues, relevant groups and the individuals involved
Validation	In mountaineering this term is often used within organisations to denote an internal approval mechanism for leaders



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**Mountain Training**

[www.mountain-training.org](http://www.mountain-training.org)

**Adventure Activities Licensing Authority (AALA)**

[www.hse.gov.uk/aala](http://www.hse.gov.uk/aala)

**AdventureMark**

[www.adventuremark.co.uk](http://www.adventuremark.co.uk)

**Association of Mountaineering Instructors**

[www.ami.org.uk](http://www.ami.org.uk)

**Association of Heads of Outdoor Education Centres**

[www.ahoec.org](http://www.ahoec.org)

**British Activity Providers Association**

[www.thebapa.org.uk](http://www.thebapa.org.uk)

**British Association of International Mountain Leaders**

[www.baiml.org](http://www.baiml.org)

**British Mountaineering Council**

[www.thebmc.co.uk](http://www.thebmc.co.uk)

**British Mountain Guides**

[www.bmg.org.uk](http://www.bmg.org.uk)

**Glenmore Lodge**

[www.glenmorelodge.org.uk](http://www.glenmorelodge.org.uk)

**Health and Safety Executive**

[www.hse.gov.uk](http://www.hse.gov.uk)

**Maritime and Coastguard Agency (MCA)**

[www.mcga.gov.uk](http://www.mcga.gov.uk)

**Mountaineering Council of Scotland**

[www.mcofs.org.uk](http://www.mcofs.org.uk)

**Mountaineering Ireland**

[www.mountaineering.ie](http://www.mountaineering.ie)

**Mountain Rescue England and Wales**

[www.mountainrescue.org.uk](http://www.mountainrescue.org.uk)

**Mountain Training Association**

[www.mountain-training.org/mta](http://www.mountain-training.org/mta)

**National Coasteering Charter**

[www.nationalcoasteeringcharter.org.uk](http://www.nationalcoasteeringcharter.org.uk)

**Natural Resources Wales**

[www.naturalresourceswales.gov.uk/](http://www.naturalresourceswales.gov.uk/)

**Outdoor Recreation Northern Ireland**

[www.outdoorrecreationni.com](http://www.outdoorrecreationni.com)

**Plas y Brenin**

[www.pyb.co.uk](http://www.pyb.co.uk)

**Royal Life Saving Society (RLSS)**

[www.rlss.org.uk](http://www.rlss.org.uk)

**Royal Yachting Association (RYA)**

[www.rya.org.uk](http://www.rya.org.uk)

**Scottish National Heritage**

[www.snh.gov.uk](http://www.snh.gov.uk)

**Sports Leader UK (SLUK)**

[www.sportsleaders.org](http://www.sportsleaders.org)

**Tollymore Mountain Centre**

[www.tollymore.com](http://www.tollymore.com)

**Weather/Met Office**

[www.met-office.gov.uk/weather/uk](http://www.met-office.gov.uk/weather/uk)

**Weather/Mountains**

[www.mwis.org.uk](http://www.mwis.org.uk)