



- Good morning morning. Thanks for coming. Can you hear me in the back of the room? Fill in seats in front due to set-up of this room.
- I won't be offended if you have to leave early from the front.
- In this workshop we're going to talk about how to train your staff to offer participants in your programs opportunities for independence.



Overview:

- **Introduction and Topic Relevance**
- **Identifying Opportunities**
- **Implementing Activities**
- **Wrap-up**

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Photo: Jordan Cranch

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- **My hope is that this presentation can offer you perspective and tools to accelerate or sharpen your organization's ability to provide meaningful opportunities for participant independence while also balancing this with excellent risk management.**
- We'll start with an introduction and talk about why independence matters.
- Then we'll talk about where you can provide independence in your programs.
- Once you've identified where you can provide independence to your participants, we'll spend some time looking at how to implement those activities.
- And we'll finish by reviewing it all, with time for questions.
- Let's get started by way of an introduction and why this is relevant.



- I am a long-time field instructor for OB and NOLS. Started with VOBS as an intern in 2004. Worked with OB for seven years before moving to NOLS in 2009. Worked in the field full-time for a number of years before moving into a program supervisor position.
- Spent two years as a program supervisor at NOLS Rocky Mountain location supervising instructors working in the field.
- When I talk about this job to my friends who don't understand outdoor education, I tell them it's like being a dean: the instructors are the teachers.
- One part of the job is to make sure we're doing what we say we're going to do – ensuring the educational integrity of the program.
- Another part of the job was to coach, mentor, and train instructors so that they were ready and able to do their jobs.
- My current role is a staffing coordinator and field instructor. I get to work 2–3 field courses/year.



- Rich outdoor ed career, punctuated by a few very significant events.
- I was promoted to lead instructor the summer after Elisa Santry died on OB course in Utah.
- Around that time, another student lost a foot in a rockfall incident.
- Discussed these events at staff training. They were always in the forefront of my mind, particularly as I stepped into a role requiring me to supervise co-workers and students.
- Held onto reins too tightly as a newer lead instructor, and also as I moved into leadership roles in programs with activities like rock climbing and mountaineering.
- This was in part due to the heaviness of those incidents, and their impact on me, and also because I was still figuring out how to give students independence while also practicing excellent risk management.
- Providing participants with opportunities for independence was scary and I erred towards providing opportunities that still allowed me and my co-workers to be highly involved, thus ensuring we could intervene if necessary.
- Learning to provide genuine opportunities for independence for my students while balancing these opportunities with excellent risk management has been a journey and I want to share some of my learning with you here.



- So, why care about independence?
- Question:
 - 1. Who here has experienced the positive benefits of participant independence in their programs? Show of hands.
 - 2. Is anyone willing to share why independence is important for their participants?

Providing opportunities for independence creates **meaningful, lasting, and transferable** experiences for our participants.



- When I think about this question, here's what I come up with:



- Independence gives participants the opportunity to succeed, to fail, to implement past learning in new situations, and to feel the consequences (positive and negative) that their decisions have on themselves and others.
- I'd bet that a lot of us know this intuitively, but I decided to look at NOLS' post-course surveys to make sure I wasn't making this up....

WHEN THE BUS SHOWED UP!



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- When asked the question, “What was most rewarding about this course?”, what do you think participants said?
- Here are some gifs to illustrate the emotions with what they found most rewarding.
- When the bus came! Okay, so I’m joking, but you’d be surprised how often this came up! Didn’t matter if the respondent was 15 or 40, they were psyched when they saw that school bus come around the corner.
- I am joking, but I had to include this because it came up so much!
- More significantly, and on point for this presentation is that students at NOLS routinely report that their experiences with independence (e.g., being leader of the day, cooking, participating in travel without instructors) are highlights of their experience.
- In responses to this question, independence came up over and over.
- Here are a few responses:



- Read student quotes 1–5
- I want to highlight the last part of this statement: “...free from heavy consequences.”
- This participant recognized and verbalized our role as staff in managing these opportunities appropriately.
- Our participants understand the importance of being able to engage with independence, and are counting on us to practice excellent risk management so that they can fail on their way to achieving a goal.



- So, our students are telling us that independence is important.
- Current research supports the idea that providing kids with independence (“unsupervised play”) is critical to their development.
- A quick search on the internet pulls up many articles about the benefits letting kids play without direct adult oversight.
- I’m going to share with you a few of the big takeaways in a second, but first....



- Looking at this slide, what are some risk management concerns you might have?
- Back to the takeaways...
- A paper in the International Journal of Environmental Research and Public Health looked at the question of whether or not “...keeping children safe involves letting them take and manage risks.”
- Their review supported the idea that, when properly managed, risky play can be an important part of child development.



- Researcher Dr. Ellen Sandseter wrote in a widely reference paper on the subject that, “Children have a sensory need to taste danger and excitement; this doesn’t mean that what they do has to actually be dangerous, only that they feel they are taking a great risk.”
- Again, I want to highlight this last part, because this is where we come in.
- Our participants only have to feel that they are taking a great risk. In some cases, it may be appropriate for participants to take on real risk through independence.
- In others, we only need them to feel that there is real risk involved.
- Perceived risk can be and often is experienced as real risk.

**How we can provide these very
necessary opportunities while still
practicing excellent risk
management?**



- So, then, the question for us is how we can provide these very necessary opportunities for our broad range of participants while still practicing excellent risk management...



Overview:

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- **Wrap-up**

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Photo: Jordan Cranch

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- So, to bring us back to how this all fits together, I've talked about why this is important to me, and why the broader field of education recognizes independence as an important part of a child's development.
- Let's move on now to how we can identify opportunities within your programs for participant independence.

IDENTIFYING OPPORTUNITIES

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A WORD FROM OUR SPONSORS

Ensure that the
risks you are
taking are aligned
with the goals of
your program!

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- Can anyone tell what's happening in this photo? What are some risk management concerns you might have?
- A quick pause for a word from our sponsors!
- First and foremost, program administrators and field staff need to be in alignment about whether the risks they are choosing are aligned with the goals of their program.
- If something goes awry during some sort of independent activity, programs want to know that **the activity had a clear purpose and was important in achieving their mission.**
- Otherwise, it's just risk for the sake of risk, (not in service of the mission) and any incident will be even harder to stomach.
- Programs need to be clear about how participant independence serves their goals, and take thoughtful risks.



Recognize where these
opportunities may already
exist →



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- We're not here to suggest you redesign your program. Quite the opposite, in fact.
- Chances are, opportunities for independence already exist within your programs and are aligned with your mission.
- So, what are some examples of participant independence?
- I shared some examples from NOLS earlier in the presentation, that's where I work right now, but I wonder if.....
- Is anyone out there thinking, "those activities you talked about sound really cool, but my organization doesn't have travel without instructors or rock climbing!" That's okay.
- I want us to think much more broadly about what independence actually looks like.



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- It's very obvious that travel without instructors is an independent opportunity. But many, many other activities that may be less obvious also present great opportunities for participants to engage with independence.
- In this photo, Outward Bound students are planning travel for the following day.
- I want to be really clear that there is no hierarchy of effectiveness in these opportunities. Opportunities without instructors are not inherently better, nor realistic, for most programs.
- Remember that perceived risk can be experienced as real risk.



- Okay, so let's brainstorm now: What are current activities within your program that you could use as opportunities for participant independence?
- I'm gonna draw one axis on this whiteboard, which is level of staff involvement. Later we'll add a second axis to it as we look at consequences of independent activity.
- I can get us started off with an example: travel without instructors, top-rope climbing, student leader of the day.
- Share with me your examples:

It's all about how you frame it!



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- I want to show you a very quick video clip: play
- Smart kid, huh?
- This is a quick **Case Study on Framing**, that I hope will help you see how you can leverage existing activities to better suit your goals for participant independence:
- For a number of years at NOLS we struggled to provide students with opportunities for independence on climbing courses.
- We had student “leaders of the day” but that leadership often didn’t amount to much more than being a conduit of information from the instructor team to the student group.
- Students felt that there was no real chance to make decisions or influence the outcome of the section.
- They would say, “Compared to the backpacking section of this course we didn’t really feel like we had any ownership or got to make any decisions.”
- We were trying to pound a square peg into a round hole by importing the hiking course curriculum into a climbing course. On hiking courses, pinnacle independent activities were easy to identify: as leader of the day, get your group from point a to point b.
- We eventually realized that plenty of opportunities for independence existed right under our noses but that we were not identifying or framing these very well.
- These already existing opportunities included choosing which skills to pursue and making a day-by-day plan to learn them, participating in multi-pitch

Almost any activity, when framed properly, can be used as an opportunity for independence.



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Photo: Levi Old

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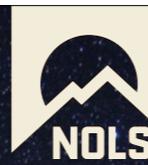
- The truth is that almost any activity, when frame properly, can be used as an opportunity for independence.



Identify the independent activities that currently exist, could exist, or that are underused in your program. Identify any activities that could be considered “pinnacle” independent activities.



- By yourself or with someone seated near you take minute to identify independent activities that currently exist, could exist, or that are underutilized in your program. Identify any “pinnacle” independent activities.
- By pinnacle activity, I mean those activities that leave our participants feeling like they’ve really reached and worked hard and accomplished something they are proud of.
- Is anyone willing to share activities identified as being underutilized? Any activities that through re-framing could be used as opportunities to practice independence?



Overview:

- Introduction and Topic Relevance
- Identifying Opportunities
- ~~Identifying Activities~~ **Identifying Activities alignment**
- ~~Appropriately~~ **Appropriately** **where opportunities already exist**
- Framing is everything!

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Photo: Jordan Cranch

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- To recap where we are and ground us: In identifying opportunities for independence within your programs, you should be considering the following:
 - Gut check about risk/mission alignment
 - Likely there are plenty of existing activities within your programs that,
 - ...when framed properly, can be used as opportunities for participant independence.



- Now that you've taken a moment to identify independent activities, and some pinnacle independent activities, let's take a look at how to implement these activities appropriately.

Consequences of Independent Activity

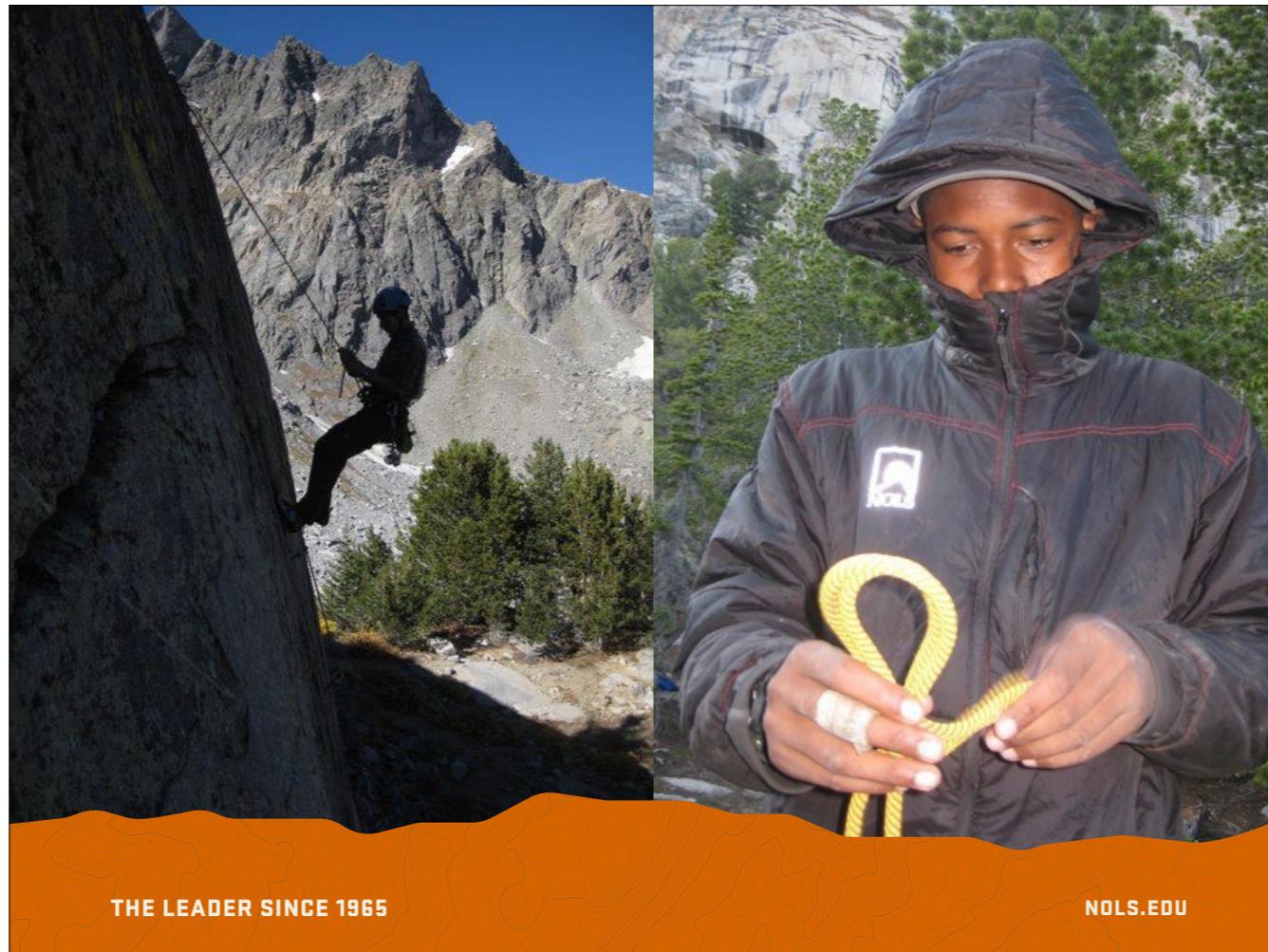
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- In providing participants with opportunities for independence, our direct oversight is, to different degrees, reduced. We lose some ability to intervene and to influence the outcome of an activity.
- In providing participants with increasing levels of independence, they will also face increased real or perceived risk. This, then, means that we need to be thinking about managing both physical and emotional risk.
- Let's look at what would happen if any one of these activities went sideways by looking at the consequences of independent activity.



- Let's go back to our original axis (level of staff involvement), and add a second one – consequence of independent activity.
- Let's now reconfigure the graph to take this into account.
- If you gave me an x-coordinate example in the first go-round, tell me where it should land on the y-axis.
- If you'd like to provide a new example, give me both coordinates.
- Make chart and finish with next statement:
- Understanding the consequences of an activity not going as planned can guide us towards an understanding of how staff should plan curriculum and what a participant must demonstrate before they are ready to participate.



- So, what differentiates one activity from another?
- For the participant, maybe nothing.
- The prospect of serving a burned meal to peers or leading a group slightly off-route could feel as daunting as participating in an overnight solo or paddling alone through a rapid.



- For those of us providing and overseeing these activities, it's the consequences of something not going as planned and the inherent risks in different activities that differentiate one from another.
- To students, these two quadrants may feel the same (which is great! We can leverage this to achieve maximum student outcomes). For staff, knowing that these activities fall into different quadrants will help us manage them appropriately.
- Ask program administrators and staff, "what is the consequence if this activity does not go as you expect? Also ask, "What if your participants deviate from what you expect them to do?"
- The answer to this question should factor into how the activity is managed.

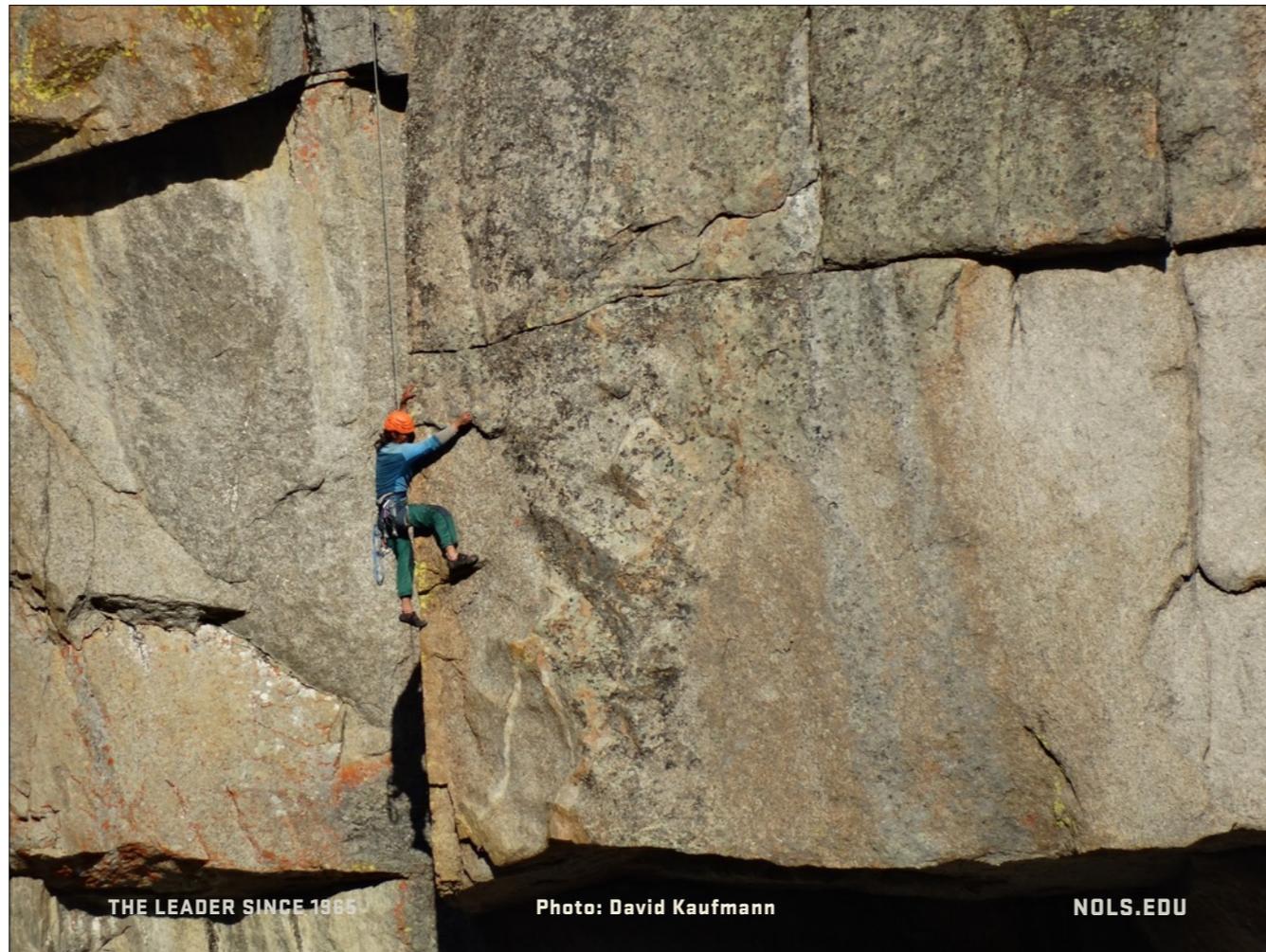


- Here are some more examples:
- If participants miss their alarms and don't get up on time, will they miss a necessary travel day or just a fun activity?
- What if students arrive unprepared? Is it acceptable to continue on with the day, without a rain jacket?, or are the days' activities on pause?
- Is it acceptable to let participants burn dinner? Is being slightly hungry okay right now or is calorie intake a necessary part of overall risk management?
- Should you let the participant on the front of your rope team approach the lip of a crevasse they didn't see, or are the risks associated with that choice unacceptable for your program or your group at that time?

What about emotional safety?



- And, what about emotional safety?
- Do individuals, or the group, have the tools to finish emotionally intact as well as physically intact?



- Train your staff to define emotional safety in the same way that they would define physical risk management expectations.
- Ask the group to agree to emotional safety standards and let them know how and when they can bring up concerns.
- This ties directly into risk management: A group in which participants don't feel safe voicing concerns is a group that already has one prerequisite for incidents.

Staff should have tools to assess the emotional skills of a group and of individuals.



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- Again, thinking about the increased risks students take on when they take on increased independence, we need to know that our staff have the tools and training to assess the emotional risk of a group and/or of individuals.
- They should use one-on-one check-ins to ask about emotional safety.
- Specifically ask participants how they are feeling about their role in the group, and how they think others feel.
- When trying to figure out who will win an election, researchers found that their data was likelier to be accurate if they asked the question, “who do you think will win,” rather than, “who did you vote for?”. Thus the question, how do you think others feel.

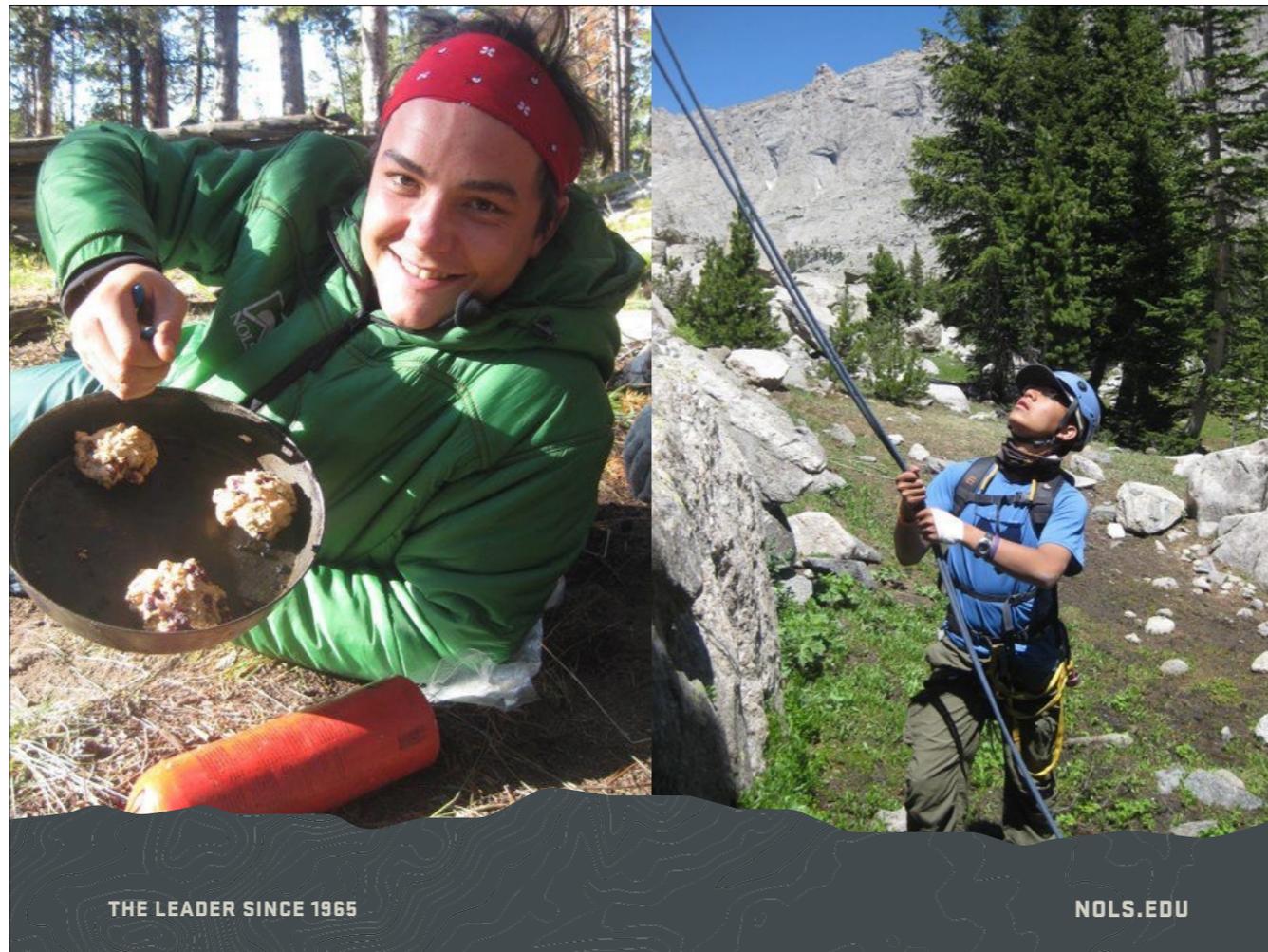


Provide staff with time to plan curriculum.

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- The next step in implementing activities appropriately is to provide staff with time to plan curriculum.
 - You've identified the activities you want to use,
 - you've considered the consequences of them not going as planned,
 - and now you're ready to use this information to plan curriculum.
- Participant independence should occur in a gradual, step-wise fashion rather than a huge, all-at-once jump and a good curriculum progression needs to reflect this.



- Staff need to provide opportunities for participants to practice the skills they will eventually perform independently. This could be over the course of a few hours or a few weeks.
- For some low-consequence activities, staff may choose to let participants learn through failure and repetition right from the start.
- With higher consequence activities, learning through failure would be inappropriate and a more tightly managed progression needs to be used.
- Can staff
 - a. Determine which activities need to be practiced first?
 - b. Plan a logical curricular progression to lead to the final activity, and
 - c. provide opportunities for practice?
- If the answer to any of these questions is no, the activity in question should be reexamined.



- Take the example of a participant cooking a meal independently.
- This is an activity with which NOLS students report feeling a lot of success and excitement to transfer to their lives at home. They also tell us that it can be very stressful at first.
- Think about the pieces involved:
 - learning how to use a stove; (show of hands: who here works for a program that has had a near miss incident due to stove use?)
 - Figuring out what all of the different food items are;
 - and, which ones in which combinations will create something tasty and nutritious;
 - adding foods at the right time;
 - Making sure not to burn the food, yourself, someone around you, or the grass/rock/soil, etc;
 - cleaning the pots and surrounding area;
 - Dealing with hungry, backseat-driving teammates! (They look friendly and helpful in this photo.)

Curriculum Progression:

- Identify the desired outcome w/timeline
- Clarify steps through which participants must progress
- What do participants need to demonstrate at each step to progress?
- Are there consequences for not progressing through all the steps? Ability to reassess?
- When and how will feedback be given?



- A good curriculum progression should include discrete steps that build on previous steps. If the desired outcome is not achieved, this progression will also be helpful in determining where and why there was a breakdown.
- Here is a sample progression:
 - Identify the desired outcome. Again, desired outcomes should be arrived at with input from program administration to ensure that risk is aligned with program goals. Another question to ask: Will the pinnacle experience for each student be the same?
 - Give participants a reasonable timeline for achieving the desired timeline.
 - Steps through which participants will progress on their way to desired outcome.
 - What do participants need to demonstrate at each step to gain the next level of independence?
 - Consequences of not progression through the steps; opportunities to reassess desired outcomes.
 - When and how participants can expect to receive feedback on their progress.
 - Tools participants can use to achieve goals: staff, peers, books, opportunities to practice, online resources, etc.

Lead Climbing Progression:

- **Lead a trad climb within 2-3 weeks.**
- **Work on movement, gear placement, mock leading, lead falls, clipping gear, and practice overall excellent risk management.**
- **Demo proficiency and comfort at each step.**
- **Have to go through all steps to lead a climb.**
- **Feedback will be given on an ongoing basis, and include overall risk management assessment.**



- Can anyone tell what is going on in this photo? A young woman is leading her first trad climb!
- Here is an example of a curriculum progression for leading a traditional climb:
 - Desired outcome: lead a traditional climb within the next 2–3 weeks.
 - Steps through which she must progress:
 - Work on movement – this likely looks like top-roping a lot of 5.7s and 5.8s without weighting the rope while climbing with confidence and efficiency.
 - Place gear on the ground and get a staff person to evaluate them. To progress to the next step, a certain number of pieces must be placed efficiently and be assessed as excellent.
 - “Mock lead” similar climbs.
 - Practice taking lead falls.
 - Practice clipping a rope into pieces of gear
 - Demonstrate overall excellent risk management
 - To progress through each new step, she must demonstrate proficiency and efficiency with each step. She must also be practicing excellent risk management in all areas of the course.
 - The consequence for not progressing through the steps is that she may not achieve her goal.
 - Feedback is given on an ongoing basis.
 - Resources include access to staff and peers who have experience with the process; access to gear with which to practice; books that provide additional information; and time provided to practice the constituent skills.



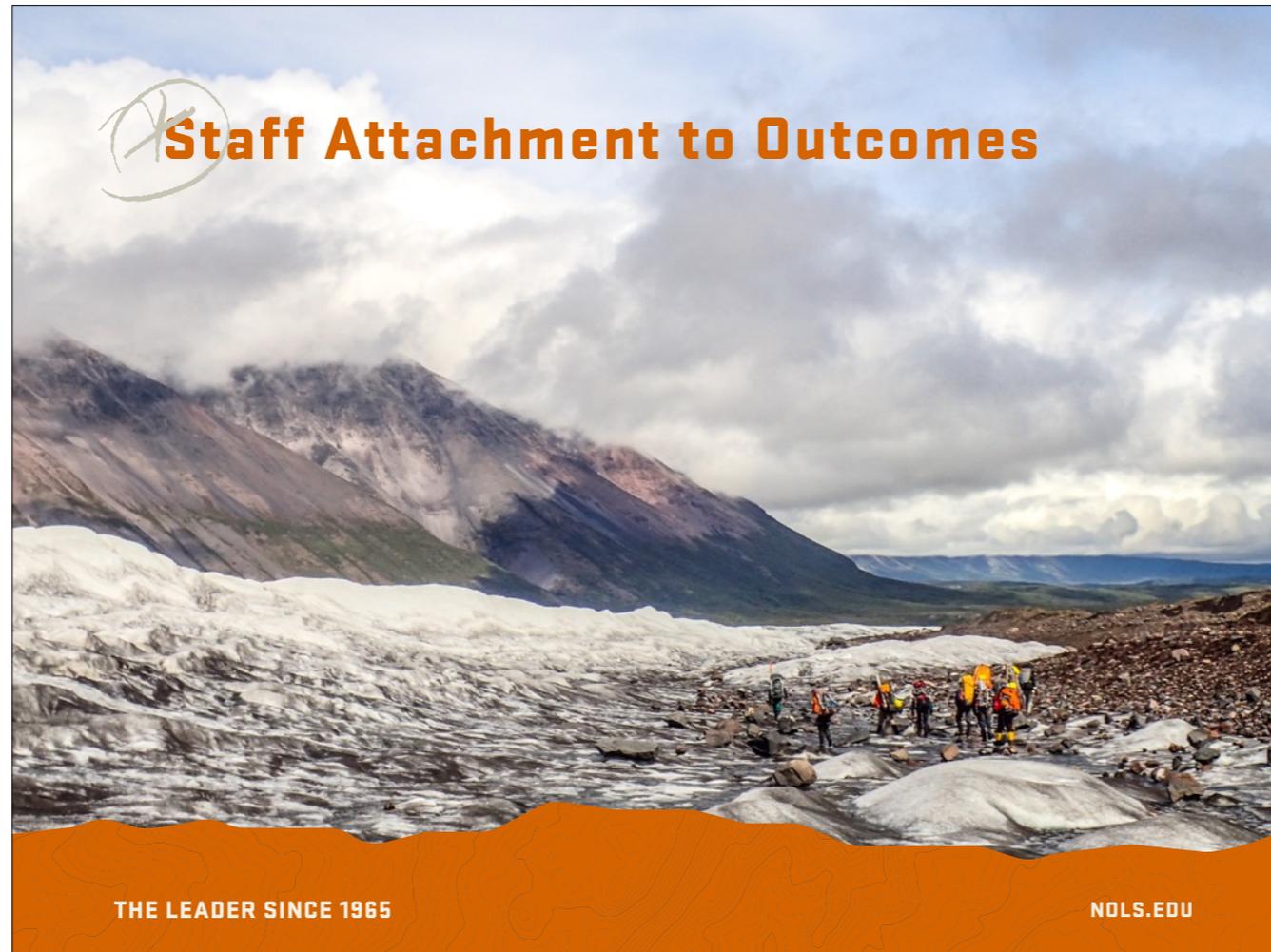
Question:

Come up with three steps in a curricular progression that participants would need to go through in order to achieve one of the independent activities you identified earlier.

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- By yourself or with someone close to you, come up with three steps in a curricular progression that participants would need to go through in order to achieve one of the independent activities you identified earlier.

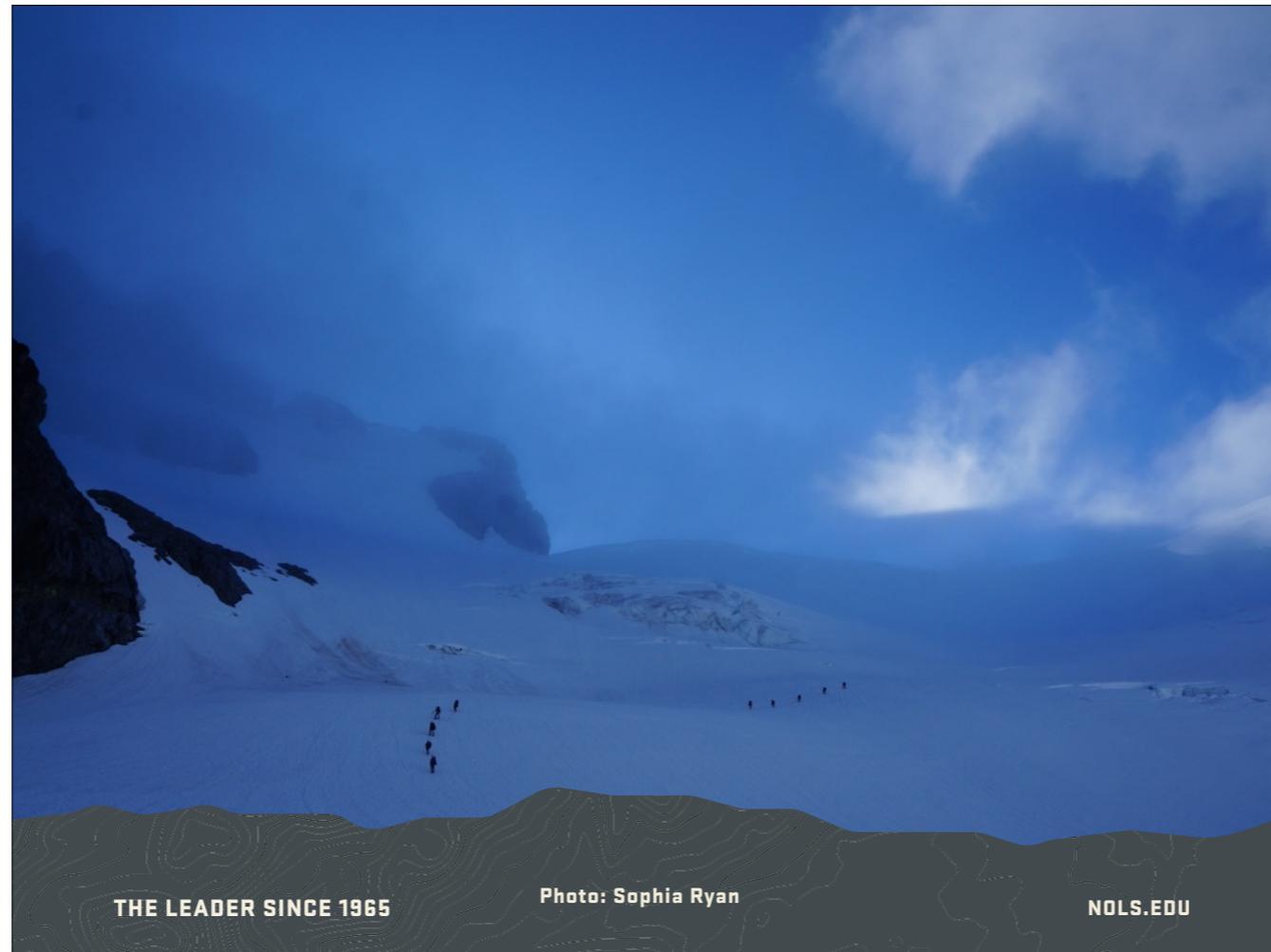


- Quick case study on where participant independence breaks down, and here's a hint....it's often on our end:
- One of the most common reasons student independence isn't leveraged as well as it could be is because staff are attached to a set outcome. This outcome could be a dinner that is not burned, a certain route that the staff person just knows is better, or a certain daily flow.
- I worked a course in the Pacific Northwest with a very experienced co-worker. Neither of us had worked in this specific course area and we needed to get to a location about eight miles away in order to meet the people and horses bringing us food for the second half of the course.
- My co-worker was in the lead role and suggested we put the maps on the ground, give students all the info we had (which wasn't much), and let them choose from the two known options. We were also open to any suggestions for other routes they could come up with.
- He also suggested that we not share with each other or the group our personal preferences. This would ensure that our opinions wouldn't influence their process and decision making.
- I certainly had an opinion on which way we should go, because I was hungry, and wet, and not making the re-ration on time could mean anything from sleeping on a slope in a wet tent to going a little hungry.
- AND, in keeping our opinions to ourselves, we definitely allowed the students to have their own experience, and the conversation they had was honest and mature.
- In terms of group dynamics, the reality of the situation lent a seriousness to the conversation and they listened to each other, asked good questions, and came to a

Assessing Participant Readiness for Independence



- So now that you've
 - identified your independent activities,
 - thought about potential consequences,
 - planned a curriculum that manages risk appropriately and allows students to progress towards the desired outcome,
 - how do you decide if your participants are ready for increased levels of independence?
- I sometimes find it easier to look at this question from the other side: that is, what cues would tell me a participant is **not** ready for increased independence. Some behaviors could include:
 - a participant is perennially unable to make it to activities on-time;
 - is unable to follow directions
 - is disrespectful to peers or staff, or in violation of group norms and expectations;
 - is inconsistent in their behavior;
 - is unable to follow risk management expectations in other areas;
- I will likely ask this person to address these areas before deciding they are ready to take on additional independence.
- Also, one of our roles in this process is to help participants figure out what are appropriate independent activities for their level of competence and maturity.
- This happens through one-on-one conversations with each participant during which time staff talk to the individual about how they are progressing in

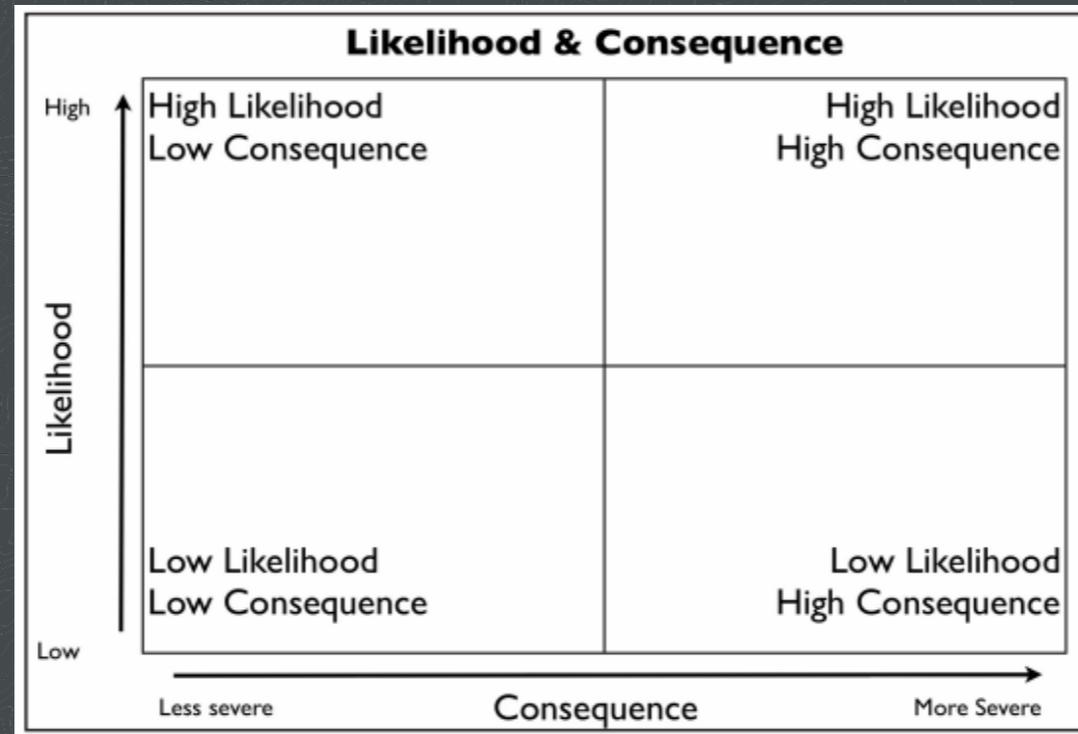
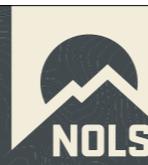


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Photo: Sophia Ryan

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- This summer I found myself working with a student (whom I will call Tim) on a technically challenging mountaineering course in B.C.
- The terrain is steep and rugged, the glaciers can present route finding challenges, and the weather is capricious.
- This student had never gone camping, let alone engaged in anything so physically rigorous.
- He had been putting off his last chance to be a leader of the day (one of our pinnacle independent experiences) and, with our last day of technical travel ahead of us, he was finally up.
- His task: To lead the group on what turned out to be one of our most technical days – terrain that day included very steep snow covered glacier, travel up a 400-meter scree field, and route finding on a hilly ridge.
- He had a lot on his plate that day: leading a rope team includes micro route finding, deciding if/when to put in protection for the group, set a pace, and keep tabs on overall route progress.
- We also had to navigate the scree field, which was something we hadn't had much opportunity to practice.
- This was too much for Tim! He was frustrated and did not feel successful.
- In retrospect, I realized that I had provided him with waaaay too many opportunities for independence and not enough opportunities to practice.
- Instead of providing him independent activities he could actually learn from, he just felt overwhelmed and then frustrated, and wasn't really successful at any of the tasks that came with leading that day.



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- Last, as you assess a participant's readiness for independence, give participants tools to talk about risk.
- A commonly used tool in outdoor education is the likelihood vs. consequence chart. This one is from NOLS.
- Introduce this tool early on in your program and ask participants to apply it often.
- Ask participants to apply it to any activity in which they are taking on increased, or new, levels of independence.
- This engages participants in risk management and helps them understand that they are an integral part of overall risk management.
- It also helps **you** understand what **they** understand. If, in the course of talking about risk, it is clear that they don't have a clear picture of what is going on, that is a sign they need more practice before moving onto the next step.



Overview:

- **Introduction and Topic Relevance**
- **Identifying Opportunities**
- **Implementing Activities of Independent activity - both physical and emotional Appropriately**
- **Provide staff with time to plan**
- **Assess participant readiness for independence**

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Photo: Jordan Cranch

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- To recap what we covered with Implementing activities appropriately:
 - Consider the consequences of any independent activities before diving into how to implement them.
 - Consider emotional safety as well as physical safety when examining consequences.
 - Provide staff with time to plan logical progressions for achieving independence.
 - Assess and re-assess participant readiness for independence.



Overview:

- **Introduction and Topic Relevance**
- **Identifying Opportunities**
- **Implementing Activities Appropriately**
- **Wrap-up**

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Photo: Jordan Cranch

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We're almost at the end of our time here so I'll begin wrapping up.



We want our participants to have opportunities for independence!

- **Risk/mission alignment**
 - **Framing**
 - **Considering consequences**
 - **Planning curriculum**
 - **Assessing readiness**
 - **Engaging participants in their own risk management**
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- We want our participants to have opportunities for independence!
- And we need to consider the following when offering participants opportunities to engage with independence:
 - Do the risk we are taking align with our mission?
 - Have we framed existing opportunities in a way that allows us to use them as opportunities for participant independence?
 - Have we considered the consequences of independence?
 - Have we provided staff the time to plan curriculum that will allow them to provide these opportunities?
 - Do staff have the tools to assess participant readiness for independence?
 - Are we engaging participants in their own risk management?
- And, last, human beings are not robots.
- At the end of the day, we can believe that we have a reasonable sense of how our participants will behave, and still be wrong.
- Part of practicing good risk management is going through the steps we've just discussed.
- Our programs will continue to have incidents.
- Our goal is that we reduce frequency and severity.
- These considerations will help us get there.

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- A shout out to all the photo contributors....I'll move through this quickly.



ACTION STEPS

1. Can you identify any activities within your current program that are underused as opportunities for participant independence?
2. Are your program administrators and program staff in alignment about independent opportunities? Do these opportunities align with your mission?
3. Make a list of three questions you'd like your staff to ask when preparing to provide participants with the opportunity for an independent activity.
4. Make a list of three questions you'd like your staff to ask when assessing a participant's readiness to participate in an independent activity.
5. Bonus question: What role will junior staff play in providing independent activities?



- And, as promised by Shana last night, here are your action steps: I'm gonna project these action steps on the screen for those of you who want to use them as a starting point for bringing some of this back to your own program.

I'll open it up for questions now.