

Chapter 1

Scope of Practice

This course will certify you as a Field Leader for one-day events held in three seasons and in Class 1 terrain providing you are a member of the OCC, follow the OCC Code of Conduct, and the following requirements are met¹:

Field Leader Requirements

Field Leaders must:

- Implement the intent of the event cycle as described in this course.
- Have inspected the event venue at least once in the past 15 months.
- Operate under the procedures and guidelines of a risk management plan². This risk management plan must have been created by a competent individual.
- Must at minimum report to a Program Supervisor and have access to mentorship from an Outdoor Mentor³, or work within a community of practice⁴.

Apprentice Field Leaders

An Apprentice Field Leader must work under the direct supervision of an adult outdoor leader.

Leading in Class 2 Terrain

To lead in Class 2 terrain a Field Leader must possess additional training and experience that has been validated as sufficient by an Outdoor Mentor and be a member of a community of practice.⁵

The OCC is unable to endorse any individual failing to comply with the Scope of Practice described above and in the relevant definitions and appendices.

¹ See Appendix E for Code of Conduct.

² See Appendix A for a description of minimum requirements for a risk management plan.

³ See the definitions found in the introduction for 'Program Supervisor' and 'Outdoor Mentor'.

⁴ See Appendix A for the definition of a community of practice.

⁵ See Appendix A for more information on Outdoor Mentor and validation processes.

Appendix A

Additional Guidelines for the Scope of Practice

A key intent of the Outdoor Council of Canada (OCC) Scope of Practice is to connect the Field Leader with a broader community of outdoor practitioners. As a Field Leader, you have ethical and legal responsibilities towards your participants. Fulfilling those on your own without support is challenging and will likely reduce quality and increase risk.

When seen as a whole, the OCC Scope of Practice is a system of checks and balances increasing the likelihood that a mistake, or series of mistakes, will be corrected before affecting your events in negative ways.

The concrete implementation of the principles found within the Scope of Practice will vary depending on your context. This appendix intends to clarify these principles and give some guidance as to how they could be implemented.

What Should be in a Risk Management Plan?

For this certification to be valid, you must operate under a risk management plan. In most cases, your organization will design most of this risk management plan. As the Field Leader, you will be expected to assess risk levels for hazards present during your event and follow the risk management plan.

Sometimes, you may not be working, or volunteering, for an organization (e.g. running local hikes for an online hiking group). In such instances, you will need to develop and implement your own risk management plan.

At minimum, a risk management plan should include the following components:

- Anticipated hazards for the event.
- Defences used to manage the hazards.
- Short description of skills required by the leaders for the event.
- Appropriate equipment lists for the event (incl. first aid).
- Emergency phone numbers for outside resources and description of the response capacity (e.g. search and rescue and their response time to your venue, etc.).
- Plan for field manageable accidents and non-field manageable accidents (e.g. communication expectation, exit points, etc.).

- Media communication plan.

This risk management plan must be written or reviewed by a competent individual. A competent individual is a person with relevant outdoor leadership experience and program management experience. If no person fits this description within your organization, the role can be separated between two individuals (i.e. an outdoor leader and a manager). If you do not operate within an organizational context, a local or activity appropriate competent individual should be contacted to review your risk management plan. In case of need, the OCC can review risk management plans.

What Constitutes Adequate Supervision?

The definitions in the introductions identify three distinct types of supervision. In each case, the definition is a description of the role the supervisor must play. These distinct roles could conceivably be provided by three different individuals, or one or more individuals might fulfill more than one role.

The type of supervision you will have access to will depend on your context. To meet the requirements of the Scope of Practice, supervision must provide you with the following support:

- Oversight: By having somebody oversee the planning and delivery of your event, you increase the likelihood that a potential mistake will be corrected in time. For this to be effective, the person providing the oversight needs to have sufficient knowledge to understand the context of your outdoor event. Additionally, some form of communication process must be developed to enable meaningful oversight. For example, communication can be done through trip planning forms or in-person conversations.
- Mentorship: As you gain experience and grow as a leader, it will be important that you can access people who can provide you with guidance. These mentors will need activity relevant expertise. Mentorship requires direct engagement through meaningful conversations, Mentorship cannot happen by simply filling out forms.

The Outdoor Mentor⁶

The Outdoor Mentor (OM) is a person qualified to mentor the program and the individuals within the program.

⁶ In previous editions of this manual this individual was referred to as the 'Respected Outdoor Leader'.

In addition to mentoring the program and its leaders, the OM must have the attributes required to ensure that the program meets or exceeds industry standards. Since it is critically important that the OM role be filled by a qualified individual, we provide some factors that should be considered when assessing a potential candidate as follows:

- The required attributes are highly contextual to the program to be mentored. In particular, the OM must have significant experience working with both the participant demographic and the range of outdoor activities offered by the program.
- Other outdoor leaders would agree that this person has the required expertise to fulfill the OM role for the program and/or individual(s) working in it.
- The person has proof of training by professional outdoor organizations and/or by academic institutions and/or relevant work experience with reputable organizations.
- The person is part of a broader community of practice and has records showing they are an active participant in that community.
- Even if the person is not OCC trained, their behaviour aligns with the principles found in the event cycle.

Typically, an OM will display all of the above indicators.

Community of Practice

Being a member of a community of practice is strongly recommended for all field leaders but required for those who are leading in class 2 terrain.

Definition: A Field Leader 'Community of Practice' is a group of outdoor leaders that meets regularly and works collaboratively in a disciplined way to share their knowledge and experiences with the goals of supporting each leader in their professional development and the continuous improvement in the quality and safety of the events that they lead.

A Community of Practice includes at minimum:

- A group of 4 -15 outdoor leaders.
- Members meet at least twice a year to discuss key topics including:
 - Sharing of leadership experiences of all members
 - Incidents (positive and negative) and lessons learned
 - Alignment of purpose(s) with program(s)

- Review of event cycle and how well members are able to complete all elements
- Developing issues that may be pertinent to the Community of Practice.
- Areas of growth to work on before next meeting
- An identified individual or individuals who act as the mentor(s) to others in the community. This individual will either:
 - be a member of another outdoor Community of Practice where they themselves are mentored by an Outdoor Mentor, and/or
 - directly mentored by an Outdoor Mentor, or
 - can be considered to be an Outdoor Mentor in their own right.

What is Appropriate Validation?

This course provides the foundational knowledge promoting quality and safety in class 1 terrain. Before leading others into higher class terrain, you will need to increase your competence as an outdoor leader and have that competence validated by an OM. This will reduce the likelihood of going into more complex terrain before being ready due to skewed perceptions of your level of competence.

Validation must be done by an OM who has relevant competency in the terrain class being validated. Furthermore, the OM should consider including potential limitations to that validation. For example, an OM could validate a class 2 upgrade for leading teenagers and adults only.

The exact implementation of validation will depend on your specific context. In general, appropriate validation will look like one of the three following scenarios:

- You lead events for an organization with a clear structure. Your supervisors and/or one or more of your colleagues qualify as an OM. In this case the OM can validate which terrain class you can lead in. Many professional outdoor organizations, school boards and camps operate in this context.
- You lead events for an organization with a clear structure. However, there is no OM within your organization. In this case, the validation process would be akin to an external accreditation process. An external OM would review the organizational structure, risk management plans, communication processes, and events within the organization. Many schools and camps and some hiking clubs operate in this context.

- Your organization is too small to have its own Community of Practice. In this case, you will need to find a Community of Practice to join. In this case, the validation is provided by an OM in this Community of Practice.

Additional Resources

We recognize that even with the above information, additional guidance may be necessary to implement the principles of the Scope of Practice. If this is your situation, contact the OCC and we will assist you.

Appendix E

Code of Conduct

Purpose

This Code of Conduct establishes the standards expected of all OCC Certified Leaders.

In fulfilling their duties as a Certified OCC Leader, and otherwise engaging in activities in which they are representing the OCC, the OCC Certified Leaders shall:

- Adhere to the scope of practice and terrain guidelines to which the leader has been certified,
- Be up to date on current practices,
- Reasonably manage foreseeable risks,
- Act with integrity and treat participants with respect and dignity,
- Not discriminate against participants due to any protected grounds under human rights laws,
- Not exploit or take advantage of their relationship with participants,
- Follow the rules, regulations and requirements of land managers in which they're operating,
- Practice Leave No Trace principles to minimize environmental impact,
- Report child protection issues as required by law to the police, and
- Mentor others to help build a culture of continuous learning and improvement.