



**Te Tāhuhu o
te Mātauranga**
Ministry of Education

Bringing the Curriculum Alive

EOTC Guidelines 2025

He waka eke noa
*A canoe on which
everyone can embark*



**Te Kāwanatanga
o Aotearoa**
New Zealand Government

These guidelines were first published in November 2002
Published by the Ministry of Education, September 2025.

The Ministry of Education would like to acknowledge:

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- › expert advice and guidance from Education Outdoors
New Zealand: Fiona McDonald
- › photos provided by Dave Cassaidy (Te Kura O Tititea
Mount Aspiring College) on pages: 3, 17, 21, 26, 27,
30, 31, 39, 62, 63, 64, 65, 83, 96, and 97.

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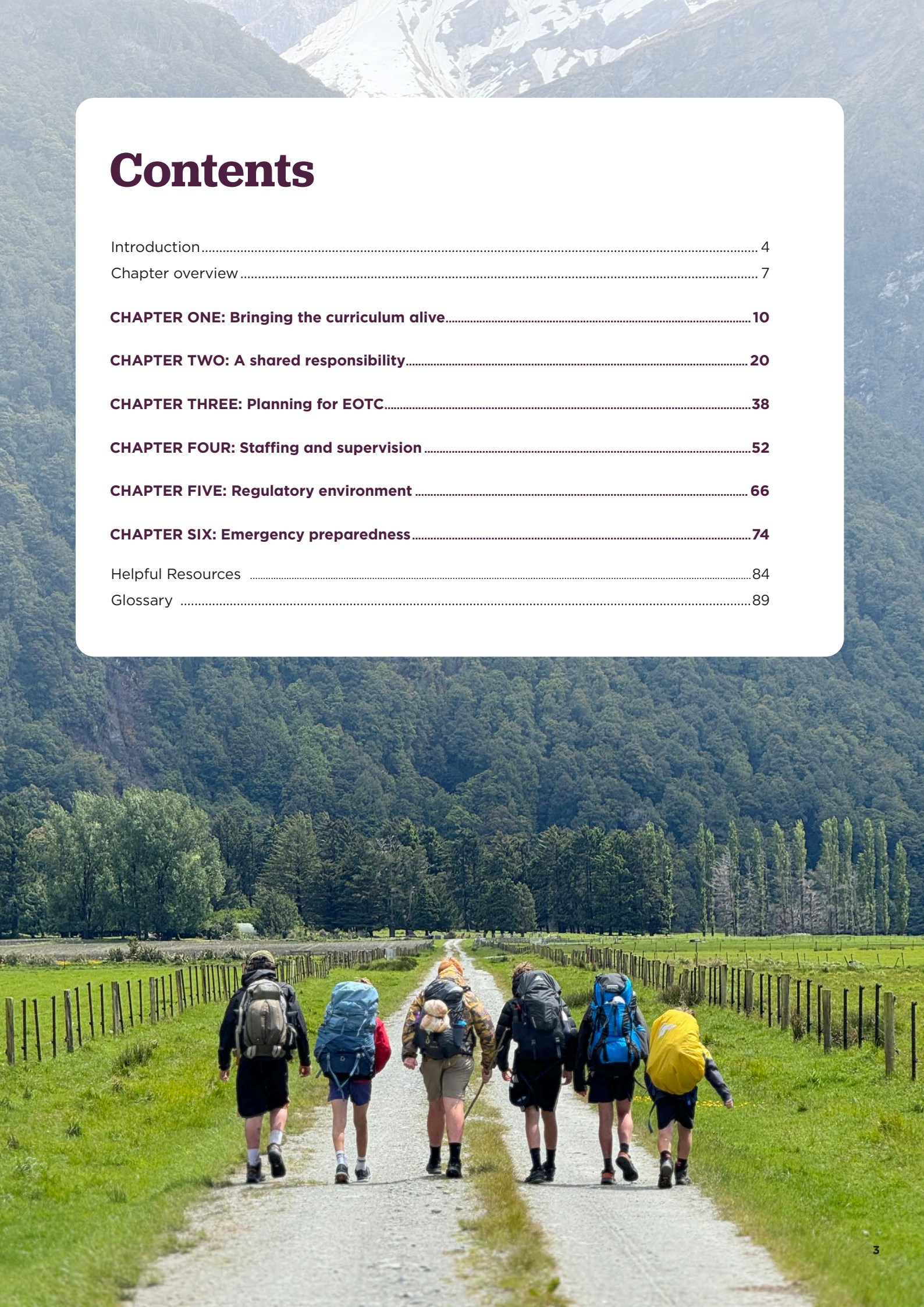
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ISBN: 978-1-75991-149-6 (rint)
ISBN: 978-1-75991-150-2 (online)

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Introduction

Tirohia kia mārama. Whāwhāngia kia rangona te hā.

Observe to gain enlightenment. Participate to feel the essence.

Education outside the classroom

Education Outside the Classroom (EOTC) is a key component of school life in New Zealand.

EOTC provides opportunities to bring the knowledge-rich national curriculum for schooling¹ to life for students through experiences with rich and engaging local contexts. This includes the use of te reo Māori, tikanga Māori, and contexts that matter for all learners, recognising the wide variety of languages, cultures, and identities of our country. It strengthens our way of being and engaging in the world, deepening our understanding of and connection to Aotearoa New Zealand.

EOTC is a term used to describe curriculum-based learning and teaching that extends the four walls of the classroom, as well as extracurricular activities that occur outside of school hours, including school sport. EOTC could include a museum or marae visit, sports team practices, games and trips, recreational activities, cultural activities, an outdoor education camp, a field trip to the rocky shore, or a visit overseas to practice another language. EOTC can take place in the school grounds, in the local community, or in regions further afield, including overseas.

Effectively facilitating learning

The links that ākonga are able to make between the classroom and real-world experiences can be critical to their long-term learning. Accordingly, school policies and practices that enable ākonga to participate in well-designed, curriculum-based experiences outside the classroom assist with their learning.

Learning safely

Learning and safety are paramount in EOTC. While EOTC provides opportunities for positive learning outcomes in education, there is the potential for incidents if programmes are not well planned, competently staffed and effectively managed.

Schools have legal responsibilities to keep learning environments safe for ākonga and staff. These guidelines emphasise that the level of risk management and documentation should be in proportion to the level of risk associated with the type of EOTC activity.

¹ The New Zealand Curriculum and Te Marautanga o Aotearoa.

Who are these guidelines for?

These guidelines are designed for the use of state schools. Other organisations, particularly providers of EOTC experiences to schools will also find them useful. These guidelines help school boards, principals/tumuaki, and kaiako to provide quality educational experiences, outside the classroom, that maximise learning and safety and that meet the relevant statutory requirements and good practice guidelines.

Purpose

The primary purpose of these guidelines is to support teaching and learning of *The New Zealand Curriculum* and *Te Marautanga o Aotearoa*. The guidelines also apply to other activities that schools are associated with such as optional opportunities provided to ākonga such as cultural activities, outdoor and active recreation, and sport.

This document should be used to regularly review a school's EOTC policy and procedures and to update them where necessary.

SMP and Toolkit templates

These guidelines are supported by a Safety Management Plan (SMP) template and a Toolkit of form templates for EOTC Management. The SMP describes and documents how EOTC happens in a school. The Toolkit templates support the planning and implementation of this. These provide good practice guidance for schools including what must be in their system and what should be considered but made applicable to their situation. These guidelines and templates are available on the Education Outside NZ website (see [Helpful Resources](#) list).

Explanation of a EOTC Safety Management system

The EOTC Safety Management system fits within the school's wider Health and Safety System as outlined below.

Overarching School Safety Management System

The EOTC Safety Management System (made up of the safety culture, EOTC SMP and EOTC Toolkit) forms part of the overarching school safety management system. Other areas of the school will have their own SMPs (e.g. Property, Technology).

Strong Safety Culture

A strong safety culture requires:

- › everyone taking personal responsibility for safety
- › safe behaviour
- › school values are enacted
- › positive, involved and competent leadership
- › planning for successful inclusion.

EOTC Safety Management Plan

A SMP consists of:

- › school context
- › annual safety improvement plan
- › roles and responsibilities
- › event procedures.

The SMP outlines how the school plans to manage and improve EOTC safety. The plan describes the roles and responsibilities that support the development and delivery of safe EOTC activities. It includes procedures that outline planning, running, and reviewing EOTC activities, including risk management, staffing, incident reporting and emergency planning.

EOTC Toolkit & EOTC Coordinator Toolkit

The Toolkit is a set of tools and forms the school uses to gather, record, and provide safety information, including before, during and after the event.

Where these guidelines fit

These guidelines: *Bringing the Curriculum Alive: EOTC Guidelines 2025* (Ministry of Education 2025) update and replace the *EOTC guidelines Bringing the Curriculum Alive* (Ministry of Education 2016).

In relation to other Ministry of Education resources, these guidelines:

- › support *The New Zealand Curriculum* and *Te Marautanga o Aotearoa*
- › are aligned with *Ka Hikitia – Ka Hāpaitia – Education in New Zealand: Action Plan for Pacific Education 2020–2030* and the *New Zealand Disability Strategy*
- › supplement information provided to school leaders regarding the Health and Safety at Work Act 2015: Keeping people healthy and safe:
- › are a companion for information regarding emergencies and traumatic incidents: Preparing for emergencies, traumatic incidents, evacuations and lockdowns.

These guidelines are supported by a number of national organisations and their resources (see [Helpful Resources](#) section).

Chapter overview

Bringing the Curriculum Alive

EOTC provides ākonga with authentic learning experiences that enhance engagement, wellbeing, and achievement. This chapter explains how EOTC is a powerful pedagogical tool that connects the classroom to the world, embracing local contexts, te ao Māori, and inclusive practices. It highlights how EOTC aligns with the NZ curriculum, helps ākonga find their voice, and helps schools design experiences that enrich and extend learning beyond the classroom walls.

Learning Safely – A Shared Responsibility

Safety and learning in EOTC is a shared responsibility across everyone involved, boards, principals, kaiako, ākonga, volunteers, and external providers. This chapter outlines key roles and responsibilities to support a collaborative and effective EOTC safety culture. Emphasis is placed on involving ākonga in planning and safety, clear communication, and a strong EOTC safety management system, grounded in current good practice.

Planning

Effective planning is key to safe and educationally rich EOTC experiences. This chapter outlines a four-stage management cycle: proposal, preparation, implementation, and review. It stresses proportionate planning based on risk, inclusive design, strong documentation, and clear communication with whānau. The EOTC Toolkit provides practical tools to guide these stages and ensure consistency with school policies and procedures.

Staffing and Supervision

The foundation of safe EOTC lies in competent staff, clearly defined roles, and robust supervision plans. This chapter outlines expected core competencies and attributes of leaders and how to assess supervision needs for activities. It includes guidelines for inclusive supervision structures, the use of ākonga as leaders, and guidance on how to ensure appropriate supervision is in place, tailored to the group size, risk level, and learning environment.

Regulatory Environment

It is important to be aware of and understand the regulatory framework and expectations that underpin safe and effective EOTC in Aotearoa. This includes key legislation, regulation and good practice.

School boards, as Persons Conducting a Business or Undertaking (PCBUs), hold primary responsibility for ensuring the safety and wellbeing of all participants under the Health and Safety at Work Act 2015 and the Education and Training Act 2020. This requires setting policies, enabling staff competence and development, and ensuring informed consent processes are in place. The principal and delegated staff are responsible for operationalising these requirements through planning, supervision, and review.

Alongside meeting legal obligations, schools are encouraged to maintain good practice by continually reviewing and improving their systems. Good practice includes staying current with developments in EOTC, promoting a strong safety culture, and actively involving ākonga and whānau. Tools such as EOTC Coordinator Network registration and EOTC safety management professional learning and development (PLD) opportunities support schools to benchmark and enhance their approach.

Together, regulatory compliance and good practice contribute to quality, safe, and inclusive learning experiences for all ākonga beyond the classroom.

Emergency Preparedness

Being prepared is essential for managing incidents during EOTC. This chapter outlines how schools can develop effective response plans, establish emergency contacts, and communicate with caregivers during critical events. It also provides guidance to help ensure staff understand their roles and responsibilities in an emergency.

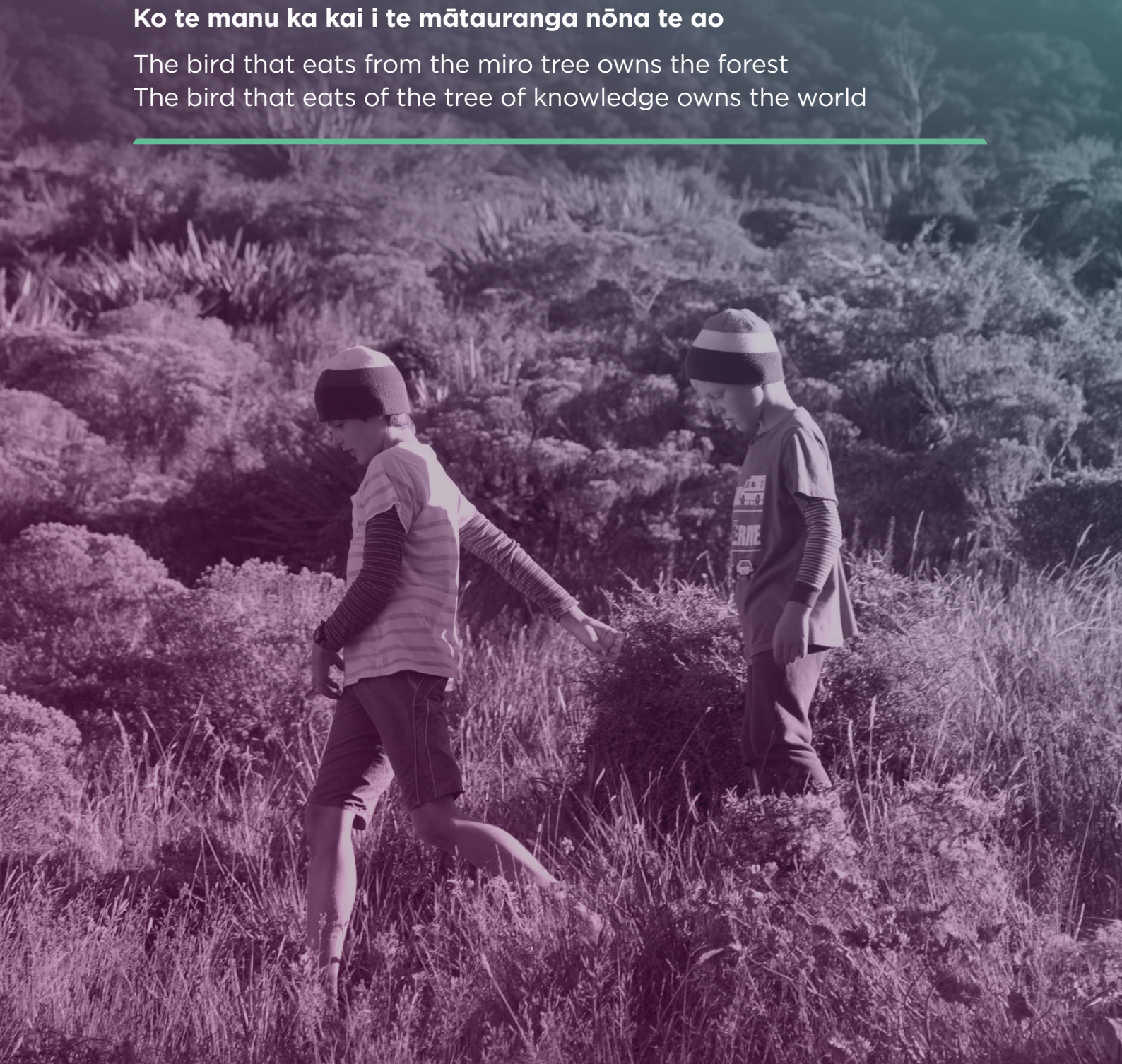
Emergency planning should draw on national guidance to ensure a consistent, coordinated, and well-informed response approach. This includes, pre-event planning, situational awareness, and access to emergency services.

CHAPTER ONE

Bringing the curriculum alive

**Ko te manu ka kai i te miro nōna te ngahere
Ko te manu ka kai i te mātauranga nōna te ao**

The bird that eats from the miro tree owns the forest
The bird that eats of the tree of knowledge owns the world



Bringing the curriculum alive

Why is EOTC important?

1. Learning both inside and outside school encourages all young people to be capable and knowledgeable citizens, who are involved with the communities they live in.
2. Education outside the classroom has the potential to support learning in ways that are consistent with the vision, graduate profile, principles, values, attitudes, key competencies, and effective pedagogy statements in the New Zealand Curriculum and Te Marautanga o Aotearoa. It can also contribute to students' development of knowledge and skills in foundational areas, such as reading, writing and maths.
3. EOTC can enhance authentic inclusive learning experiences across the learning areas of the national curriculum.
4. School leaders, kaiako and ākonga see the value in EOTC contributing to curriculum enrichment and real-world learning, student engagement, building connections and relationships within and between students, teachers and communities, providing opportunities for new or unique experiences that students may otherwise not have. See report Education Outside the Classroom - a Comprehensive National Study: <https://eonz.org.nz/Resources/Research>

Learning can take place anywhere

The school grounds

5. The school buildings and grounds are a rich resource, offering opportunities for formal and informal learning and play. For example, ākonga can:
 - use patterns and numbers in autumn leaves to develop numeracy
 - write about what they see, hear, feel while sitting under a tree
 - study spiders on the school fence
 - grow vegetables or native plants
 - play sports on the fields or courts
 - learn about energy use and waste.

The local environment and community

6. Learners can develop the skills and confidence to explore their local community, which may be within walking distance of the school or accessible by car, local bus, or train ride.
7. Exploring natural landscapes and streetscapes, scientific reserves, heritage sites including sites of significance to local iwi, sports and recreation facilities, places of worship, theatres, live music events, sustainability activities and involvement in volunteer and citizenship projects can enrich all areas of the curriculum.

8. Ākonga also develop skills by participating in extracurricular events such as a school organised sports team, cultural group or recreational club that meet in the evenings or weekends either on school grounds or elsewhere in the local community (sports fields, swimming pools, sports centres, community halls).

Places further afield

9. As young people mature, they gain confidence and appreciate more distant and challenging environments that stimulate their curiosity and imagination. For example, ākonga can explore:
 - rural or urban environments that contrast with their own environment and possibly involve an overnight stay
 - bush and water environments within a few hours from a road end or accessible by vehicle
 - theatre workshops, places of worship, farms and gardens, museums and galleries, and places that reflect the world of commerce, science and technology.
10. Teams, groups or individuals representing the school in sports, cultural or recreational activities may participate in regional or national competitions or gatherings. These experiences offer challenging and stimulating environments, activities and making connections with new people/friends, which differs from what a classroom or school grounds can offer.
11. Staying away from home for a few nights or more is a powerful way of developing key life skills and provides opportunities for learners and kaiako to strengthen their relationships. Learners can stay at residential camps, outdoor education centres or marae, they can take part in cultural and arts festivals, they can go on an outdoor journey, sports trip, or geography or biology field trip or they may travel overseas for cultural, classics, or language learning experiences. Such experiences contribute to deepening ākonga awareness of the key competencies, principles, and values while bringing the learning areas alive in real-life contexts over an extended period of time.

Curriculum vision

12. *The New Zealand Curriculum* and *Te Marautanga o Aotearoa* both emphasise a vision for ākonga in Aotearoa New Zealand that provides opportunities for designing meaningful learning experiences beyond the classroom. If ākonga are to be confident in their own identities, learning should occur in places where that sense of identity is strong and can be developed, and those places are not limited to the classroom or school. If ākonga are to be connected to the land and environment, they need opportunities to engage in learning beyond the classroom walls.

EOTC and the Curriculum

13. The principles of *The New Zealand Curriculum* and *Te Marautanga o Aotearoa* can be embedded in the design and implementation of each school's learning experiences outside the classroom. Many of the people and places that can strengthen ākonga understanding of and commitment to Te Tiriti o Waitangi are beyond our schools and classrooms, as are many of the sources of knowledge of te ao Māori. Through learning outside the classroom, we can reflect Aotearoa New Zealand's cultural diversity, and the places we take ākonga to can signal the value of diverse histories and traditions, and deepen student understanding of the relationships between local, national, and global contexts.
14. The interactions that take place while ākonga are involved in learning outside the classroom are rich opportunities for implementing an inclusive curriculum that is non-sexist, non-racist, non-discriminatory and supportive of all ākonga that experience disabilities. The places we take ākonga to, and the roles we engage them in while outside, can recognise and affirm all identities, languages, cultures, abilities, talents, and learning needs. The principle of community engagement has special implications for EOTC. Where better to connect with the wider lives of ākonga and develop partnerships with whānau and communities than in the community?
15. Similarly, the principle of coherence is fundamental to learning outside the classroom because any 'beyond school' experience inevitably crosses learning areas and can potentially support transitions and pathways to further learning. The national curriculum emphasises the importance of dealing with future-focused issues (such as sustainability, citizenship, enterprise, and globalisation) and includes a strong focus on the core skills of literacy and numeracy.
16. Moving beyond the classroom, ākonga are able to directly engage with key authentic resources that relate to those issues, including people, organisations, and places and apply their understanding of core skills in 'real world' scenarios. Learning beyond the classroom enables ākonga to reflect on and gain insights into their learning processes so that they are learning to learn. Learning sites outside the classroom provide opportunities for high expectations to be realised. All ākonga, regardless of their individual circumstances, can learn and can achieve personal excellence in the context of EOTC experiences.

EOTC and the values in the New Zealand Curriculum/Te Mātaiaho

17. EOTC provides opportunities to develop the following New Zealand Curriculum values:
 - excellence, aiming high and by persevering in the face of difficulties
 - innovation, inquiry, and curiosity by thinking critically, creatively, and reflectively
 - diversity, as found in our different cultures, languages, and heritages
 - equity, through fairness and social justice
 - community and participation for the common good
 - ecological sustainability and care for the environment
 - integrity, which involves being honest, responsible, and accountable and acting ethically
 - respect for themselves, others, and human rights.

18. EOTC can enable ākonga to:

- encounter the values of diverse groups and cultures as they occur in real-world contexts
- experience values being demonstrated by others in authentic ways
- strengthen their understanding of what values are
- understand or explain how values influence their own interactions with people and places beyond school
- consider a range of types of values (cultural, moral, social, aesthetic, and economic)
- have a basis for learning the skills needed for inquiring into values – exploring, empathising, critically analysing, and discussing.

EOTC – the key competencies and the learning areas**19.** The New Zealand Curriculum identifies five key competencies: thinking managing self-using language, symbols, and texts relating to others and participating and contributing.**20.** Settings beyond the classroom are rich sites for developing, practising, and demonstrating the key competencies in a range of contexts within and across learning areas.

- Authentic contexts are essential for developing the key competencies. Since it is important for ākonga to develop and demonstrate their capabilities, where better than in authentic contexts beyond the classroom?
- Ākonga need to apply the key competencies and use them to transform learning. They are a means of transforming the way in which ākonga engage with and use their knowledge and understandings. Where better to apply and transform new learning than in relevant, authentic contexts beyond the classroom?
- Ākonga need to develop the disposition to use the key competencies. Attitudes are important as well as knowledge, skills, and values. Learning beyond the classroom prompts ākonga to demonstrate that they are ready, willing, and able to use the new competencies that they are developing.
- The future-focused aspect of the key competencies can be reinforced through EOTC, through experiences in which ākonga encounter future issues that are a current concern in contexts beyond school.

Teaching as inquiry and EOTC**21.** Teaching as Inquiry (The New Zealand Curriculum/Te Mātaiaho) is about the thinking that kaiako do as they consider what is most important, given:

- ākonga learning needs and aspirations (focusing inquiry)
- the teaching approaches they intend to use (teaching inquiry)
- the impact previous teaching has had on ākonga learning (learning inquiry).

22. These considerations are important for all teaching and learning but are critical in EOTC because kaiako need to inquire into both learning needs and safety needs.

Focusing inquiry

23. What matters most?

- What are ākonga learning needs? What do they need to learn and do?
- What kinds of learning experiences will help them to learn?
- Will this learning include learning beyond the classroom?
- What previous EOTC experiences have our ākonga had? How can we build on what they already know and can do?
- What, therefore, is most important for them to experience and learn outside the classroom walls?

24. For individual ākonga consider their:

- age
- experiences
- stage of developmental readiness
- level of capability
- level of confidence
- skills
- limits
- needs.

Teaching inquiry

25. What is the best way to teach and learn?

- What is the most appropriate learning environment for ākonga learning needs?
- What EOTC activities are appropriate for the developmental needs of ākonga?
- What approaches have others (both kaiako and researchers) found to be effective?

26. Kaiako should carefully design learning experiences, including EOTC experiences, by using effective pedagogy. Evidence shows that ākonga learn best when kaiako:

- make connections to prior learning and experience
- create a supportive learning environment
- facilitate shared learning
- enhance the relevance of new learning
- provide opportunities for ākonga to set goals and identify personal anxieties and challenges
- provide sufficient opportunities to learn and encourage reflective thought and action. The opportunities should be carefully aligned and sequenced. Progression of learning is particularly important in the context of EOTC.

Create a supportive learning environment

- 27.** EOTC provides an ideal context to develop supportive relationships between members of a learning community, through learning in real social and cultural contexts that are inclusive of all learners. The need for a supportive learning community is important at all times and in all contexts but is particularly critical when ākonga move beyond the classroom and school.

Facilitate shared learning

- 28.** The experiences ākonga have together beyond the classroom are important not only because of the learning that occurs for each of the individuals involved but also for the shared experience that kaiako can draw on afterwards. The shared experience becomes a platform for subsequent activities and tasks. EOTC can also help to develop partnerships in which learning is seen as a reciprocal activity, involving ākonga, kaiako, whānau, and others in the wider community. EOTC experiences confirm that many people are learners within this community and that not only kaiako have expertise to offer.
- 29.** EOTC provides rich, real-world contexts that stimulate ākonga curiosity. These experiences support connections across learning areas, link to ākonga lives and prior experiences and offer authentic opportunities to apply learning.

Progression: Supporting learning and safety in EOTC

- 30.** A well-designed EOTC programme ensures tasks and experiences progress in complexity to match ākonga capabilities. Sequencing activities thoughtfully, both within individual events and across a school's wider programme, helps build confidence, capability, and safety.
- 31.** Learning and safety are enhanced when experiences are aligned to what ākonga already know and can do. Providing sufficient opportunities to practise and progress ensures success and reduces the risk of being out of their depth.
- 32.** Sequencing tasks within a single activity builds skills and confidence together. This supports ākonga to enjoy success while developing their ability to stay safe.
- 33.** EOTC events (e.g. camps) should follow a purposeful sequence of learning, not just a mix of rostered activities. Consider:
- Do early activities build confidence and stay within ākonga limits?
 - Is there continuity in staffing to support progression?
 - Are ākonga, staff, and whānau involved in planning and evaluating the event?
 - Does the sequence build trust, skills, and confidence in increasingly complex ways?
- 34.** EOTC experiences should be part of a planned learning journey. Ask:
- Do activities build on prior learning from earlier years or other schools?
 - Are early-year experiences laying a foundation for later learning?
 - Do end-of-year activities extend ākonga knowledge, skills, and confidence?

Te Akoranga Taiao me Te Marautanga o Aotearoa

Ko te Oranga Taiao, He Oranga Tangata

- 35.** Ko te akoranga ki waho i te akomanga he whakaakoranga matua ki ngā tauira e haere ana ki te kura Māori. Ehara te akoranga taiao i te mea hou ki tā te iwi Māori. Ko te mahi māra, te mahi hī ika, te mahi whakairo, te mahi raranga, te mahi hākinakina, te mahi whakauka whenua hoki ētahi momo akoranga ki te taiao nō te ao kohatu o ngā mātua tūpuna. Ka noho ngātahi te akoranga i te akomanga ki roto ki te akoranga taiao.

Ko Te Marautanga o Aotearoa

- 36.** Ko te tāhū o Te Marautanga o Aotearoa i whakaūkia i runga i ngā wawata kia tū tangata te ākonga, kia tupu hei ākonga mātau, hei ākonga pakari, hei ākonga whakawhiti kōrero i roto i te ao Māori, e whai oranga ai tōna hinengaro, tōna tinana, tōna wairua, me tōna pūmau hoki ki tōna tuakiri, ki tōna tūrangawaewae. Kei a ia ngā pūkenga, ngā mōhiotanga hoki e whai wāhi atu ai ia ki te hāpai i te iwi Māori me te ao whānui.
- 37.** Kua whārikihia te akoranga taiao i Ngā Mātāpono Whānui o Te Marautanga arā:
- Ko te ākonga te pūtake o te ako
 - Kia pūmau te ākonga ki a ia anō
 - Kia eke te ākonga tōna taumata
 - Me mahi tahi te kura, te whānau, te hapū, te iwi me te hāpori
 - Ko te oranga taiao, he oranga tangata.
- 38.** E ai ki te mātāpono Ko te oranga taiao, he oranga tangata, ka whakamana te Marautanga i te urunga atu a te kura, te whānau, te hāpori, te hapū, me te iwi e arotahi ana ki te tū a te tamaiti, ki roto i tōna ake ao. Nō reira, ka pūmau te marautanga ā-kura:
- Kia toitū te taiao
 - Ki te whakawhanake i ngā huarahi ako e whai take a te tū a te tamaiti ki te taiao
 - Ki te whakarite kaupapa hei honohono i ngā wāhanga ako
 - Ki te whakamana i te mahi a te tipuranga ki tōna ake ao.

He Rauemi Awhina

- 39.** Kei te kete āwhina ngā puka pūnaha haumaruru.
- 40.** He tohutohu ēnei mo ngā kaiako whakahaere o te ngohe akoranga taiao rātou ko te tumuaki, te poari whakahaere, te kairuruku, ngā mātua, ngā ākonga, ngā tūao, ngā kaiwhakarato-ā-waho hoki.
- 41.** Kua takoto ēnei puka hei āwhina i ngā kura ki te whakatakoto i a rātou ake pūnaha, kia whakatutuki hoki i ō rātou kawenga i raro i tēnā ture, i tēnā ture.
- He tohutohu noa ngā puka, ā, he pai te whakarerekē kia hāngai pūmau ki tōu ake kura
 - Ki te whakarerekē i ēnei puka, kia maumahara me hangai ki ngā ture haumaruru
 - He pai te tārua i ngā puka nei.
- 42.** Hei tauira: He tauira noa tēnei i Te Kura Mana Māori o Whangaparāoa. Kāore e kore, kei ia kura ā rātou ake kōrero hei tauira.

Nā Te Kura Mana Māori o Whangaparāoa (Whangaparāoa)

43. Ko te haerenga mai o ngā manuhiri a Te Whare Wānanga o Hawai'i i Hilo (ngā mātua, ngā kaumatua, ngā kaiako, ngā kaiāwhina, ngā tauira hoki) tētahi tauira akoranga taiao. He mea hou te manaaki iwi taketake nō Hawai'i ki tā te kura o Whangaparāoa.
44. Ka tū tētahi pōwhiri, whai muri i tērā e haere ana ngā mihi. Ko ngā tamariki e mihi ki te manuhiri, katahi ka waiata hei kinaki mo tō rātou waiata. I uruuru atu anō hoki ngā tamariki ki te karakia Ringatū i whakahaeretia e te minita.

Akoranga Taiao

45. I mua i te haerenga ki tātahi, ka aratakina te karakia e tētahi o ngā kaumatua. Nāna i tuku whakamoemiti, i tuku inoi kia whakawātea te huarahi, kia manaakitia te rōpū kia kaua e pā atu te āhuatanga kino.
46. I a mātou ko ngā tamariki me ngā manuhiri e haere ana ki te taiao i puta kōrero i ngā tamariki o Whangaparāoa mo ngā wāhi tūpatotanga, ngā wāhi noho tapu, ngā wāhi hei manaaki whenua o tō mātou taiao. He mea mīharo ki te hunga Hilo kia rongo i ngā tamariki o Whangaparāoa e mau tonutia ngā tikanga me ngā kōrero tuku iho.
47. I a mātou e hīkoi ana i raro i te maunga kūrae rongonui o Whangaparāoa ko Tihirau, ka kitea te pīngao e tipu ake ana. Ko te whakamārama a ngā tamariki, ko te pīngao hei ārai atu i te ngahae o te moana. E ai ki ngā pakeke, hei te rewanga rawa ake o te whetū ko Autahi, i te pae moana, ko tērā te wā e āhei ai te tangata te hī moki. He tikanga tuku iho o Kauaetangohia e mau tonutia ki ēnei rā.



- 48.** Nā te ngaru o te moana me tōna karekare mai, ka whakamārama mai te tumuaki o te kura i ngā kōrero o te taunga mai o ngā waka o Te Hekenga Nui o te Māori mai i ngā motu o Te Moana-nui-Kiwa. Ā, ka puta te take i tapaina te hapū o Whangaparāoa me tō rātou whare tūpuna ki te ingoa ko Kauaetangohia. Mutu ana, haere ake ana te rōpū ki te toka whakamaumahara ki te ūnga mai o ngā waka. Nā te tumuaki hoki te hītori o te kōhatu whakamaumahara i whakamārama, arā Te Haika o Tainui.
- 49.** Katahi ka haere tā mātou ope ki te wāhi hopu tuna, ā, nā te kuia i kōrero mō āna hopu tuna i a ia e tamariki ana. Ka hīkoi haere tonu, ā, ka haere ngā kōrero o ngā kōwhaiwhai o te marae. Mutu ana ka ākona te hunga Hawai'i ki te waiata mō te moki. Kātahi ka whakaakona ngā tamariki ki te hula e te hunga Hawai'i, arā, te waiata-ā-ringa a Ngōi Pewhairangi ko “whakarongo ki te reo Māori”.
- 50.** I te hokinga atu ki te kura, ka pōwhiritia te iwi o Hawai'i ki te hakari, nā te mea ko tēnei tō rātou pō whakamutunga. Ka horahia ngā tēpu ki ngā kai Māori o Kauaetangohia, otirā, o Te Whānau-ā-Apanui. Puhake ana te kai reka, arā, te kōura, te pāua, te poaka puihi, te tuna, te pūpū, te kānga kōpiro me te aha noa atu o ngā kai Māori.
- 51.** I te mutunga o te hākari, tūtū mai ngā tāngata o Hawai'i ki te mihi i te reo taketake o Hawai'i me te reo Pākehā hoki. I puta ngā kupu whakanui mō te manaakitanga i horaina mai e Kauaetangohia me te miharo a ngā tamariki e pūmau tonu ana te reo me ōnā tikanga Māori, ā, e kore e wareware i a rātou te pai o ngā tamariki e tino mōhio ana ki ngā āhuatanga huhua o tō rātou taiao. I te mutunga o ia whaikōrero, ka hula rātou – te mutunga kē mai o te pai! Mutu ana ka whakatakoto koha mō te kura. Ka whakahokia te mihi e te kura o Whangaparāoa, te mihi anō hoki ki te mahi whakaora i te reo taketake o Hawai'i. Otirā, kua whakapakari anō te hononga ā-reo, ā-iwi hoki i waenga i te Māori me te iwi o Hawai'i.
- 52.** I te ata, nā ngā tamariki i tuku taonga. Katahi ka tuku whakmoemiti kia pai te takatū o te hunga o Hawai'i i Aotearoa.

Te Marautanga o Aotearoa me te Akoranga Taiao

- 53.** I tauiratia mai e ngā tamariki o Te Kura Mana Māori o Whangaparāoa ngā mātāpono o Te Marautanga o Aotearoa i roto i te manaaki manuhiri me tā rātou mōhiotanga ki tō rātou ake taiao e whakaahua i te reo o ngā matua tūpuna. Tēna rā koutou, ngā mokopuna o Kauaetangohia. He rangatira tō iwi i a koutou.
- 54.** Ko te reo Māori te reo o te tangata whenua o Aotearoa. He taonga i roto i te Tiriti o Waitangi, ā, he reo whai mana i raro i ngā ture o Aotearoa. Otirā, koia nei te whainga a Te Kura Mana Māori o Whangaparāoa, arā, kia matatau anō hoki ā mātou tamariki ki te reo Māori me ngā mahi a ō rātou tūpuna, ahakoa i te kāinga, i te kura, i te taiao rānei.

CHAPTER TWO

Learning Safely – a shared responsibility

Ko Tangaroa ara rau Tangaroa hā.

Of the many pathways of the sea everyone must be alert,
know their roles and be willing and able to assist others.



A shared responsibility

While the school board is ultimately responsible for the health and safety of all participants in EOTC, and for ensuring that learning outcomes are met, the board can only achieve this with the help of everyone involved. This includes effective delegation of responsibilities to relevant competent people.

For every EOTC event there are people and organisations with particular roles, and responsibilities that together contribute to a safe learning experience for all involved.

Table of EOTC shared responsibilities

Role	Responsibilities
Ākonga	Drive the learning experience; participate in planning and organising EOTC activities; take responsibility for implementing safe practices; enhance learning and safety outcomes.
Person in Charge	Oversees the activity; has responsibility for ākonga, Activity Leaders, and assistants; ensures communication of roles, responsibilities, and obligations.
Activity Leaders	Work with the Person in Charge; meet ākonga learning and safety needs; must be competent; exercise sound judgement based on skills and experience.
Assistants	Support ākonga learning and safety; enhance experience through appropriate selection, briefing, and supervision.
EOTC Coordinator	Ensure school-wide consistency of EOTC management systems; involve all in the safety process.
School Board and Principal	Ensure robust EOTC management policies and procedures are in place; support quality learning and safety outcomes through effective governance and leadership.
National Bodies (e.g. Education Outside NZ, NZ Outdoors Instructors Association)	Provide good practice guidance through standards and guidelines; support schools to enhance learning quality and reduce incidents.
Whānau, Community, Iwi and Hapū	Provide expertise, opportunities, and support to enrich EOTC experiences for ākonga; create enduring connections beyond the school setting.
External Providers	Collaborate with schools to deliver learning and safety outcomes for ākonga; engage in ongoing consultation, cooperation, coordination, and communication with schools.

Responsibilities of the school board and the principal

55. The Health and Safety at Work Act 2015 defines that the school board is the Person Conducting Business or Undertaking (PCBU) and has the primary duty of care. The board is responsible for ensuring that all reasonably practicable steps are taken to ensure the safety and wellbeing of people in their school (i.e. the workplace they are in control of). The board's responsibilities include any school activities that take place away from the school grounds, including EOTC.
56. The Education and Training Act 2020 provides that while a board is the governing body of a school, the principal manages the school's day-to-day administration subject to any policy directions from the board.
57. It's a core part of every school board's legal obligations to have a strong focus on health and safety.

There are nine components of an effective health and safety system that the board is ultimately responsible for:

i. Leadership

Creating a safety conscious culture requires visible leadership from the board and the principal. Every school board must ensure the school:

- is a physically and emotionally safe place for all students and staff
- gives effect to human rights and relevant student rights
- takes all reasonable steps to eliminate racism, stigma, bullying, and any other forms of discrimination within the school
- is inclusive of, and caters for, students with differing needs
- gives effect to Te Tiriti o Waitangi.



ii. Worker participation

Worker participation is a key part of an effective health and safety system because the people who do the work are best placed to understand and manage the risks and contribute to system improvements.

iii. Specific practice guidelines, rules and regulations

The board's responsibility is to ensure the right policies, processes, and systems are in place and that they receive regular updates and reports to evidence that the requirements are being met. This represents the school approach to delivering health and safety in the workplace and sets out and describes the standards against which a school measures and accounts for its health and safety performance.

There are a range of resources and guidelines provided by the Ministry of Education to assist boards to manage risks and comply with the health and safety legislation.

iv. Risk identification, assessment and management

The board must manage risk and ensure, so far as it is reasonably practicable, health and safety under the Health and Safety at Work Act 2015. Managing work health and safety risks involves the following four steps:

1. **Identifying hazards:** finding out what situations and things could cause death, injury or illness.
2. **Assessing risks:** understanding the nature of the risk that could be caused by the hazard, what the consequences could be and the likelihood of it happening.
3. **Controlling risks:** implementing the most effective control measures that are reasonably practicable in the circumstances.
4. **Reviewing control measures:** ensuring control measures are working as planned.

v. Workplace management

Workplace management is about ensuring everyone is inducted into the school including knowing about health and safety, that emergency planning exists and that there is a positive culture about the importance of health and safety. The responsibilities of the board are to exercise due diligence to ensure the school complies with its duties under the Health and Safety at Work Act 2015.

vi. Equipment

Schools are responsible for the provision of appropriate equipment for all work environments workers are likely to encounter in their work, and to ensure that the equipment is up to appropriate design standards. The school must, among other things, provide a safe and healthy environment for workers, including access to facilities. The school board as an entity can be liable under the Health and Safety at Work Act 2015 if it does not meet its duties.

vii. Injury and illness support and rehabilitation

The board is responsible for ensuring that the systems, policies and processes are in place to prevent and manage discomfort, pain and injury of employees effectively. Employees will be happier, healthier and more productive, injury-related costs can go down, and the board can more easily meet the legal requirement to protect employees from harm and work with employees to successfully return to work.

viii. Health and wellbeing programmes

The Health and Safety at Work Act 2015 makes the health and safety of workers and workplaces a priority. The board's role to ensure there are health and wellbeing programmes that are available to employees.

ix. Monitoring, reporting and assurance

The board has overall responsibility for ensuring the workplace health and safety system performs. It must ensure it has the information needed to monitor the performance of the workplace health and safety system. The leadership team, health and safety representatives, and health and safety committees may all contribute to providing information on the system performance to the board and assisting officers to meet their due diligence duty.

- 58.** Anyone in the school who is considered to occupy a position that allows the person to exercise significant influence over the management of the school is an officer of the school and must exercise due diligence to ensure that the school complies with any duty or obligation the Health and Safety at Work Act 2015 imposes. This includes taking reasonable steps to gain an understanding of the nature of the programme and the associated hazards and risks, and ensuring appropriate processes are in place to respond to these.
- 59.** There are many other practical and legal responsibilities that may be relevant to an EOTC event, such as those that relate to employment, food safety, transport, and privacy.
- 60.** Practically, the responsibilities of school boards and the principal can be divided into three major areas: staff competence and good practice, health and safety, and equipment and resources and can look like the following actions.



Competence and good practice

- 61.** The school board (likely through the principal) must ensure that systems are in place that require:
- an Activity Leader's competence is assessed against good practice
 - only competent Activity Leaders are approved to lead EOTC activities
 - assistants have the appropriate skills, knowledge, and/or experience for their assigned role
 - contractors, parents/caregivers and volunteers have been screened for their suitability to work with ākonga and where the Children's Act 2014 applies, children's workers are safety checked.
 - all staff, contractors, volunteers, and ākonga are involved in safety management planning and have been instructed in the health and safety procedures to be used during EOTC events
 - ensure that roles and responsibilities of all external providers involved are clarified, understood and accepted.

Health and Safety

- 62.** The school board and the principal must:
- understand and comply with their legal responsibilities
 - ensure that the school has a health and safety policy and procedures and that these are in place and implemented effectively
 - ensure that responsibility for coordinating EOTC in the school has been assigned to competent staff (the principal, the EOTC coordinator, a senior staff member or a committee) and is adequately resourced
 - ensure that all external providers used for EOTC meet good practice criteria (see **Toolkit form 6** for assistance with this) and
 - ensure that where outside provision of an adventure activity occurs, a registered adventure activity provider is used (See the WorkSafe NZ definition of an What we mean by adventure activity: <https://www.worksafe.govt.nz/topic-and-industry/adventure-activities/what-is-an-adventure-activity/> and the public Register of Adventure Activity Operators <https://register.worksafe.govt.nz/>)
 - ensure that informed consent is (either individual or blanket) obtained from parents/caregivers before ākonga participate in EOTC
 - ensure that staff are provided with the time and resources to visit EOTC sites during the planning stages of an event whenever practicable
 - undertake a risk assessment to ensure that all risks to health and safety are identified
 - eliminate or minimise all identified risks so far as reasonably practicable through the application of appropriate safety management procedures (example, see **Toolkit form 2 and 3**)
 - appropriately address any risks reported to the board in writing and respond in writing to communicate how these risks have been addressed
 - maintain a register of incidents that either harmed or might have harmed any ākonga, staff member, or volunteer

- ensure plans are in place to respond to incidents, emergencies, or traumatic events and that all staff are familiar with them, including a clear process for dealing with media
- review the school's safety management systems regularly
- review any incidents that occur to determine any lessons learned and implement any recommendations made
- ākonga participating in an EOTC activity have access a currently qualified first-aider.

Equipment and Resources

63. The school board must have processes in place to:

- identify all circumstances and activities where safety equipment and/or clothing is necessary
- provide safety equipment and/or clothing to safeguard all staff, volunteers, and ākonga from any danger to their health and safety
- ensure that all people use safety equipment and/or clothing when required
- store safety equipment and clothing securely and ensure its use and distribution is controlled and that regular inventories are made
- confirm that all safety equipment and clothing complies with any relevant New Zealand standard or code of practice, is fit for the purpose, and is adequately maintained
- keep a usage and maintenance log for safety equipment and clothing (see **Toolkit form 13**)
- store, secure and keep all goods, materials, substances, and equipment so that they do not endanger people
- fully instruct staff and ākonga who may be responsible for goods, materials, substances, and equipment about their safe use and storage in accordance with any specific regulations, standards and according to manufacturer's instructions (for example, fuel and stoves)
- make communication devices available and ensure a communications plan is in place for EOTC activities.

Responsibilities of the EOTC coordinator

- 64.** The EOTC coordinator is the person who has delegated responsibility and overview of all EOTC in the school. It is the responsibility of this person to ensure that planning, process, and procedures are in place across all EOTC activities and that these are appropriately delegated and implemented. It is also this person's responsibility to ensure that there is regular system review of the school's EOTC processes to ensure they remain robust (see **Coordinator Toolkit form 5**). The EOTC coordinator may be a kaiako, senior staff member, senior leadership team member with EOTC responsibility or the principal (or the role may be shared by a combination of these).
- 65.** Ideally, the EOTC coordinator will have experience relevant to the school's EOTC programme and a strong belief in using EOTC as an effective part of pedagogy to support teaching and learning. It is critical that the coordinator has a thorough understanding of the EOTC Guidelines, SMP template and toolkit.

- 66.** The EOTC coordinator's responsibilities cover three major areas of staff competence and good practice, health and safety, and equipment and resources.

Competence and good practice

- 67.** The EOTC coordinator, either directly or through delegation to the Person in Charge ensures that:
- only a competent person is approved as the Person in Charge or as an Activity Leader and their competence is assessed against good practice
 - roles and responsibilities have been clarified, documented, and agreed to by everyone in the supervision structure, including any volunteers
 - Activity Leaders check the safety of their EOTC activity and venue before the activity commences
 - assistants who support EOTC activities are informed, trained, and supervised appropriately
 - the EOTC planning includes a pre-activity briefing of all leaders and assistants involved the event
 - external providers meet good practice criteria (see **Toolkit form 6** for assistance with this). Where outside provision of an adventure activity occurs, a registered adventure activity provider is used (see the Worksafe NZ definition of an adventure activity: What we mean by adventure activity | WorkSafe:
<https://www.worksafe.govt.nz/topic-and-industry/adventure-activities/what-is-an-adventure-activity/> and public Register of Adventure Activity Operators (<https://register.worksafe.govt.nz/>)).



Health and Safety

68. The EOTC coordinator, either directly or through delegation to the Person in Charge, ensures that:

- the school's EOTC policy and procedures are implemented
- the principal is informed if the school's EOTC policy and procedures are not meeting good practice
- all staff involved in EOTC have been inducted into the school's EOTC policy and procedures
- reasonably practicable steps have been taken to ensure the physical, emotional, and cultural safety of ākonga and staff involved in EOTC
- ensure that risks relevant to any planned EOTC event are identified and reasonably practicable steps are taken to eliminate or minimise these risks (for example see **Toolkit form 2 and 3**)
- risks that are relevant to the EOTC event and that cannot be easily eliminated, or minimised, have been reported in writing to the school board for it to act upon appropriately
- all incidents are recorded in the school's incident register, reflected on, and appropriately responded to according to the school's procedures
- a periodic trend analysis of incidents is undertaken to identify and respond to recurring or common incidents
- the safety management and emergency procedures for each EOTC activity are identified and communicated to all Activity Leaders, assistants, and ākonga
- where there is a deviation from the policy or procedure, there is clear documentation of the reasons for it and how it is being managed and reported to the board
- health information and emergency contact details are compiled for ākonga, staff, contractors, and volunteers on any EOTC activity and is available to those that require the information.



Equipment and Resources

- 69.** The EOTC coordinator, either directly or through delegation to the Person in Charge, must ensure that:
- safety equipment for EOTC is specified and used
 - first aid kits are accessible and available during all EOTC events
 - hazardous substances are correctly stored, labelled, and transported
 - equipment is appropriately stored and repaired as required, equipment logs are kept (see **Toolkit form 13**), and when equipment has reached the accepted use-by date, it is retired and replaced
 - a communications plan is detailed in the school's emergency management plan and used to facilitate actions during an emergency
 - procedures are in place for access to food and water, and disposal of rubbish and other waste, and the protection of water, flora, and fauna during an EOTC event
 - these procedures are consistent with Department of Conservation environmental care information (see [Helpful Resources](#), care codes).

Responsibilities of the Person in Charge

- 70.** The Person in Charge is the person who is overall in charge of a particular EOTC activity or event on behalf of the school. This person is responsible for managing a team of Activity Leaders and assistants during an event or is the sole Activity Leader.
- 71.** When practicable, a school should have, for every EOTC event, a Person in Charge who is their employee. The Person in Charge should have the required competency for their role. If they are managing a large group, this person should not be directly involved in supervising ākonga but should be free to maintain an overview of the whole event.
- 72.** There may be multiple organisations involved in an EOTC event (i.e. external providers). Each external provider involved will also have a Person in Charge. The respective Persons in Charge must clarify with each other where and when their respective responsibilities apply and execute these according to good practice.
- 73.** During the planning phase of an EOTC event, the Person in Charge should have an understudy (a deputy). This person should be familiar with all aspects of the planning in case the Person in Charge is unable to attend the event at the last minute or has to leave the event while it is in progress.

The Person in Charge's responsibilities cover three major areas:

Competence and good practice

- 74.** The Person in Charge must:
- have a thorough understanding of their school's EOTC policy and procedures, including the school's SMP (or equivalent) and toolkit
 - ensure that educational goals that meet ākonga needs are established for the EOTC activity at the outset of planning



- assess their own competence against good practice standards before planning begins
- ensure that parents are given sufficient information about an EOTC event, including the specific risks, in writing and are invited to any briefing sessions. This is to ensure that they have enough information to give informed consent for their children to attend
- make arrangements for parents whose first language is not English and/or te reo Māori, to allow them to be well informed and able to make a decision
- brief attending parents and other volunteers, ākonga, contractors, and staff about the EOTC event's objectives, the code of conduct, the school's safety management procedures (including contingency plans), and any relevant school policies
- brief parents and other volunteers, ākonga, contractors, and staff about the specific roles and responsibilities of all parties, and each person's role and responsibilities in an emergency response
- ensure that activities are sequenced to facilitate a progressive acquisition of skills and/or knowledge that will result in quality educational outcomes and safe participation for all
- ensure that activities are inclusive for everyone, including those who require extra support or those who experience a disability
- ensure there are readily accessible lists of all the participating ākonga, Activity Leaders, and assistants. The lists should include emergency contact details, medical profiles, and any other pertinent information. Ensure this information is treated in accordance with the Privacy Act 2020 and in line with the school's privacy policy.

Health and Safety

75. The Person in Charge should:

- ensure that ākonga are involved in age appropriate safety management planning
- ensure that ākonga who require additional support to participate fully are supported to do so safely, as per their individual ākonga support plan (see **Toolkit form 9**)
- ensure that external providers receive medical, health and support needs information, in a timely manner, to allow them to manage health and safety effectively. External providers are required to have systems in place to ensure this information is treated in accordance with the Privacy Act 2020 (<https://www.legislation.govt.nz/act/public/2020/0031/latest/LMS23223.html>)
- ensure that all serious risks relevant to any planned EOTC event are identified and reasonably practicable steps are taken to eliminate or minimise risks through the application of appropriate safety management procedures. (see **Toolkit form 2**)
- cancel the EOTC activity if an identified risk cannot be adequately controlled
- ensure reporting of all incidents in the school's incident register
- ensure that appropriate contingency plans are in place
- ensure that ākonga needs and any risks associated with these (educational, cultural, health, medical, nutritional, and behavioural) are identified and managed.



Equipment and resources

- 76.** The Person in Charge ensures that:
- first aid kits, emergency equipment, and a means of communication that will work in the location, are taken to the event
 - weatherproof copies of emergency procedures and contact details are provided to Activity Leaders to take into the field
 - all equipment is returned to storage, cleaned and in good condition and that usage and repair logs are completed.

Responsibilities of Activity Leaders

- 77.** Activity Leaders work under the leadership of the Person in Charge and can be kaiako, coaches, other staff, contracted providers (for example, instructors), adult volunteers, senior school ākonga, or tertiary ākonga. This group must have the appropriate competence for the activities they are responsible for (**Toolkit forms 4 and 5** may assist with this).
- 78.** Through the participation and guidance of Activity Leaders, EOTC activities involving large groups can be more effectively managed. This helps ensure safety and ākonga can more easily achieve the intended learning outcomes.
- 79.** Activity Leaders also have responsibilities in three main areas: competence and good practice, health and safety procedures, and equipment and resources.

Competence and good practice

- 80.** Activity Leaders:
- assess their own competence against good practice standards before planning begins. Saying “no” to leading an activity is an accepted and respected response
 - instruct ākonga in appropriate safety procedures and have practised them for themselves
 - ensure that ākonga experience ‘challenge by choice’ (that is, they are encouraged in a supportive group environment, not forced or pressured, to participate in activities)
 - brief assistants on their specific role and responsibilities, the activity outcomes, their allocated ākonga and the relevant school or contractor safety management procedures and/or policies that apply
 - assess the needs and capabilities of ākonga against the demands of the activity and make any necessary adjustments to the programme
 - ensure that there is minimal impact on the environment and that sustainable practices are used in all aspects of the EOTC activity
 - make every effort to deliver the activity so that educational goals and ākonga needs are met.

Health and safety

81. Activity Leaders:

- must take reasonably practicable steps to ensure their own safety and the safety of other staff, contractors, volunteers, and ākonga during EOTC activities, and ensure that no action or inaction on their part causes harm to any other person
- must comply (so far as they are reasonably able to) with any instruction that is given by a school
- must cooperate with any reasonable policy or procedure of the school relating to health and safety that has been notified to them
- ensure that activities are sequenced to facilitate a progressive acquisition of skills and/or knowledge that will result in quality educational outcomes and safe participation for all
- provide cultural safety for ākonga by being sensitive to, and respectful of, different cultural practices and by planning for them
- inform assistants of any cultural practices relevant to the group and emphasise the need to respect them
- provide ākonga who require extra support with any identified help needed as per their individual support plan
- provide assistants with information they need to successfully do their job for any ākonga who have an individual support plan or other additional support needs and ensure that assistants keep such information confidential
- understand and follow the safety requirements of all the activities they are responsible for and determine any special care that should be taken by themselves, the assistants and the ākonga. This includes ensuring they take medical and other relevant information for their group into the field
- identify all hazards and risks
- ensure that risks, such as unsafe equipment and practices, are reported in writing to the EOTC coordinator and/or the Person in Charge
- cancel an EOTC activity if an identified hazard or risk cannot be adequately controlled.
- report all incidents in the school's incident register
- understand and know how to implement any applicable contingency plans
- understand their role and responsibilities in an emergency and be able to respond appropriately
- ensure that ākonga needs and any risks associated with these (educational, cultural, health, medical, nutritional, and behavioural) are identified and managed.

Equipment and resources

82. Activity Leaders must ensure that:

- appropriate safety equipment and/or clothing is used when required
- safety procedures for specific activities and use of equipment are known and understood
- equipment maintenance log/records of maintenance are referred to before any equipment is used to ensure the equipment is fit for purpose
- first aid kits, emergency equipment, and a means of communication that will work in their location are taken

- weatherproof copies of emergency procedures and contact details are taken into the field
- all equipment is returned to storage cleaned and in good repair and that usage and equipment checking and maintenance records are completed
- participants have access to food and drink and are provided regular breaks/intervals to eat and drink during an EOTC event, to maintain energy levels.

Responsibilities of assistants

83. Assistants could be kaiako, support staff, adult volunteers, and tertiary or senior ākonga. The role of an assistant differs from an Activity Leader they help and support the Activity Leader, and may not have relevant experience for the EOTC but has the adequate training and knowledge to support the activity. Such people should be assigned to an Activity Leader as an assistant. They should be briefed on the risk management and emergency procedures and their role and responsibilities. Where appropriate and relevant they should be given ākonga medical details and other relevant information on their group with clear instructions on the privacy requirements around this information and their specific responsibilities. The level for supervision of an assistant should be in proportion to the level of risk in the activity. Supervision of an assistant may, therefore, be direct or indirect (see **Toolkit form 4** and **5**).

84. School staff acting as assistants on EOTC experiences continue to act as employees of the school whether the excursion takes place within normal school hours or outside those hours. Staff must do their best to ensure the health and safety of everyone in the group.

They should:

- follow the instructions of the Activity Leader or Person in Charge and help with support and behaviour management
- consider stopping the excursion or the activity and notifying the Activity Leader if they think the risk to the health or safety of the participants in their charge is unacceptable.

85. Adult volunteers (including parents/caregivers and tertiary ākonga) and senior ākonga acting as assistants on the EOTC experience should be clear about their roles and responsibilities during the activity.

They should:

- do their best to support the Activity Leader and ensure the health and safety of everyone in the group
- not allow themselves to be left in sole charge of participants, except where it has been previously agreed as part of the risk assessment and pre-planning
- only accept the responsibility of being an assistant if they are comfortable with the role and the skills they have
- follow the instructions of the Activity Leader and the Person in Charge and assist them by supporting ākonga to learn and meet behavioural expectations according to the role they have agreed to
- speak to the Person in Charge or the Activity Leader if they are concerned about their own health or safety or that of participants or other leaders at any time during the EOTC experience.

Responsibilities of ākonga

- 86.** Ākonga involved in EOTC activities have some basic responsibilities for their own safety and the safety of others. It is recommended that an age appropriate code of conduct be co-constructed by all involved, including the kaiako, ākonga and any others involved in the event. If special rules apply to a particular activity, they should be explained and understood at the start of that activity.
- 87.** An EOTC code of conduct could include the following:
- take an active part in developing and implementing this code of conduct
 - follow the instructions of your Activity Leader
 - do not touch or interfere with potentially hazardous substances or equipment unless permitted to do so and with the appropriate safety precautions
 - behave appropriately to help ensure safety and foster an enjoyable environment
 - wear appropriate clothing at all times and confine long hair and loose clothing during activities where they are a risk
 - during an emergency – fully cooperate with the persons in charge
 - eat and drink during the time provided for eating and drinking
 - use equipment appropriately and take care to minimise damage or loss
 - report any faulty or ill-fitting equipment to the Activity Leader or other supervisor
 - report any incident to the Activity Leader immediately
 - carry out your responsibilities to the best of your ability – look after one another
 - if lost – stop, stabilise, advertise. Stop (stay together and stay put, move only if you are exposed to the weather), stabilise (provide warmth, shelter, food, and drink), and advertise (draw attention by use of a whistle or by visible signs)
 - challenge yourself within your personal limits (both physical and psychological). Support others to do the same but refrain from pressuring them
 - tell your Activity Leader if you feel unsafe or see any unsafe practices in an EOTC activity that you are involved in
 - look out for anything that might hurt or threaten you or anyone in the group and inform the Activity Leader about it
 - always participate in EOTC activities responsibly and under supervision
 - use sustainable practices and follow the Department of Conservation guidelines and Leave No Trace principles (please see Helpful Resources page)
 - if overseas, be sensitive to local customs
 - treat the environment as taonga (a treasure).
- 88.** Any ākonga whose behaviour is a danger to themselves, or the group, may be prevented from going or be removed from an EOTC activity only after all avenues of support have been investigated. For those ākonga, the curricular aims of the experience should be fulfilled in other ways wherever possible (see **Toolkit form 10** Ākonga Contract).

Responsibilities of parents/caregivers of ākonga who participate in EOTC

89. Parents/caregivers' responsibilities in supporting their child's learning in EOTC are important particularly in providing information to help meet their child's needs and keep them safe.

The responsibilities include:

- provide informed consent for their child to participate in EOTC experiences
- read and engage with the information provided by the school, and ask questions if they are unsure
- depending on the level of risk, and whether the event occurs out of school hours, this may be in the form of blanket consent at the start of the year or programme consent for a series of related activities (e.g. multiple swimming lessons) or individual event consent (see **Toolkit forms 8A, 8B and 8C**)
- provide updates on their emergency contact numbers whenever they change
- provide any information about their child's emotional, psychological, and physical health that might be relevant to the EOTC event (usually by means of the health profile form, see **Toolkit form 9** and/or an individual ākonga support plan, **Toolkit form 11**)
- help prepare their child for the EOTC experience, for example, by helping them to obtain everything on the gear list. The school may have some gear available
- support the school on matters such as an 'early return agreement' for unacceptable behaviour.



Responsibilities of external providers

90. When external providers are used will have responsibilities at each of these levels within their organisation to ensure they work effectively in partnership with the school.
91. External providers work with schools to provide experiences in which they have specialist knowledge, training, qualifications and skills.
92. The external provider must complete a contract for their services and clarify, in writing, their roles and the respective responsibilities of themselves and the school (see **Toolkit form 6**).
93. Schools have a responsibility to assess the quality of the providers used to support their programmes. It is recommended that schools undertake a reference check before hiring/partnering with a provider to ensure they are reputable and capable of meeting the requisite standards of good practice
94. External providers who are providing 'adventure activities' must be registered on the WorkSafe website and they should provide you with the link to their registration (see [Helpful Resources](#) page under WorkSafe, Register of Adventure Activity Operators, to be certified to provide these activities).
95. There are many activities offered to schools by external providers that are not defined by the regulations as 'adventure activities' and therefore do not need to be on the Register of Adventure Activity Operators. In those cases, the following should be provided to the school if requested:
 - assurance they operate under a documented safety management system, (ideally an externally audited one)
 - an example of their risk assessment and management tool (for example, a copy of their standard operating procedures for one or more of the activities)
 - assurance that all Activity Leaders have relevant and current skills and qualifications, first aid certificates, and appropriate driving licences
 - assurance that all Activity Leaders have relevant, logged, recent experience
 - referees' contact details (ensure that you contact them).
96. In contracting or hiring instructors to support delivery of a programme or activity, schools should be following good practice, such as hiring to match the scope of the activity and ensuring the instructor holds the required competence. Instructors should hold a recognised New Zealand qualification that is current, where a qualification is available for that activity.
97. External providers must receive relevant medical health and support needs information for ākonga, school staff and volunteers to allow them to manage health and safety effectively. Systems will need to be in place to ensure this information is treated in accordance with the Privacy Act 2020 (see [Helpful Resources](#) page for links to legislation).

Planning

Anticipation and excitement are part of the launching – but nothing can be achieved without a plan, a workforce, and a way of doing things.



Planning for EOTC

- 98.** Quality planning is necessary to enhance ākonga learning outcomes and to strengthen safety management in EOTC. Quality planning includes:
- ensuring planning and documentation is proportional to the level of risk
 - having a systems approach to EOTC management
 - having clear communication with parents/caregivers.
- 99.** Leaders should consider illustrating the workflow of EOTC planning, approval and implementation to assist staff to follow the agreed processes in their school (e.g. by creating a flowchart or table showing the required planning and implementation steps, this could be based on *Table 3.1*)

Managing the documentation

Keeping it proportional

- 100.** The level of planning for EOTC should be in proportion to the level of risk associated with the EOTC activity type. The various EOTC activity types and the suggested planning and documentation that are appropriate for them are shown in *Table 3.1*. Considerations include:
- who should give final approval for the activity
 - parent/caregiver consent
 - risk management planning.
- 101.** Parents/caregivers must be informed of all activities that their children will participate in, regardless of the type. Decisions on whether separate parent/caregiver consent, over and above a blanket EOTC consent obtained for all students, should be obtained are linked to whether the activity extends out of school hours and/or whether the activity involves more than a minimal level of risk.

Types of EOTC activities

- 102.** EOTC activities have distinct characteristics, which will require individual consideration and management if they are to facilitate positive learning outcomes for ākonga. EOTC venues range from lower to higher risk environments, e.g. from the foreshore to mountain tops, and from urban to natural environments.

EOTC management systems

- 103.** A systems approach to EOTC management contributes both to safety and to ākonga learning outcomes. Good systems within a school reduce work for staff and enable them to focus on effective teaching. Systems also help to ensure that EOTC policy and procedures are applied consistently across the school.

104. Schools must have records of their decision-making processes to show how they fulfil their legal and professional obligations and how they follow current good practice in all aspects of EOTC. To achieve this, each school will have an EOTC management system that includes procedures for managing the following areas:

- learning outcomes
- approval processes
- staff, ākonga, contractors, and volunteers
- external providers
- safety and risk management
- informed consent
- communication
- transport, venues and equipment
- emergency response
- incident reporting and review
- programme development and review.

105. The EOTC Safety Management Plan template can be downloaded via the Education Outdoors NZ website, see [Helpful Resources](#) page for links to the Safety Management Plan and Toolkit.



Table 3.1 EOTC Activity Category Guidance Table

Activity Risk Type	Overview of Event Types	Minimum level of approval required	Parental information and consent required	Planning
Low Risk	Routine activities and local environments e.g. museum, art gallery, botanic gardens, sports and recreation events, day hike in a local park or in local bush, city visit, bus trip.	EOTC Coordinator or Leader of learning/Team leader approval as delegated by Principal	Parent/caregiver notification Blanket consent (annually)	Current health information Standard Operating Procedures Other appropriate forms
Medium to High Risk	Where risk exposure is greater than what would typically be the case at school. <ul style="list-style-type: none"> › Adventurous activities › Hazardous environments including but not limited to water, speed, height, chemicals, extreme weather conditions, technical equipment or animals. › Unpredictable environments. e.g. Field trip to beach (sand dune study, no planned swimming), skiing, waka ama, rock climbing, swimming in natural environments (beach, river), farm visits, field trip involving chemicals or heavy machinery.	EOTC Coordinator and Principal/Senior Leader with EOTC responsibility approval	Parental notification Event consent and specific risk disclosure or Programme consent for series of events (e.g. Senior Outdoor Education modules)	Current health information Risk assessment and supervision form (RAS) Other appropriate forms
Overnight	Residential multi-day overnight trips e.g. trip to another region, sports tournaments, field trips to urban environments, historic sites, field trips into natural water, bush, or alpine environments, or other hazardous environments, outdoor education camps, outdoor pursuit journeys in the 'backcountry' (for example, biking, tramping, canoeing).	EOTC Coordinator and Principal/Senior Leader with EOTC responsibility Schools may choose to also seek Board approval	Parental notification Event consent and specific risk disclosure	Current health information Risk assessment and supervision form Other appropriate forms such as health profile, transport, staff and volunteer competence & agreements, venue checklist
Overseas	Service trips, sports tours, cultural exchanges	Principal and Board approval	Parental notification Event consent and specific risk disclosure	Current health information Risk assessment and supervision form Other appropriate forms such as health profile, transport, staff and volunteer competence & agreements, venue checklist

Diversity, Equity and Inclusion

- 106.** The Education and Training Act 2020 guarantees the participation of all children in all aspects of the school curriculum. This is reinforced by the Human Rights Act 1993, the New Zealand Disability strategy and inclusive education practice.
- 107.** No ākonga can be excluded from any EOTC experiences, including overnight trips, based on disability, gender diversity, or other circumstances that require support.
- 108.** All ākonga need to have positive EOTC learning experiences. For this to occur consideration must be given to the best ways of supporting the additional needs of ākonga. This includes, but is not limited to vision, hearing, physical, intellectual, learning, neurodiversity, health, medical, gender diversity, spiritual and cultural requirements.
- 109.** Planning and preparation are essential for successfully including all ākonga in EOTC programmes. See Accessibility and Inclusion in Outdoor Education and Recreation Guide: <https://eonz.org.nz/Resources/EOTC-Safety-Management/Good-Practice-Guidelines>
- 110.** Consideration should be given to all practical steps to support ākonga, including but not limited to:
- a robust individual ākonga support plan
 - additional staff resourcing
 - adaptive equipment
 - all gender bathrooms
 - appropriate sleeping arrangements on overnight trips.
- 111.** In the case of adventure activities and overnight experiences, planning should occur months prior to ensure that appropriate supports are in place.
- 112.** Gender equity in the outdoors is important. Rainbow and gender diverse ākonga might require different toileting arrangements or sleeping arrangements on a school camp. Additional measures should be taken during certain activities to protect their privacy and safety. See [Helpful Resources](#) for diversity and inclusion, and menstruation and rainbow inclusion practices: <https://eonz.org.nz/Resources/Menstruation-Rainbow-Inclusive-Practices>
- 113.** There may be occasions where it is unsafe for ākonga to be taken on an EOTC event despite the school having taken all practicable steps to provide for their inclusion. If there is significant risk that a ākonga is unable to participate safely and is likely to cause significant harm to themselves or others, the ākonga may need to be excluded from some or all of the EOTC event. Ākonga should only be excluded if all reasonable options for their inclusion have been exhausted.

Variations in EOTC policy

- 114.** Schools should document the circumstances under which they will permit any variation from the school's EOTC management policy or procedures. The Person in Charge should be able to justify any variations made to the school's or an external provider's EOTC policy or procedures. Variation should only be considered when the safety of an individual or group is compromised by following the existing policy or procedures.

- 115.** For EOTC activities where weather, environmental conditions or critical staffing are required, schools should set operational limits for whether an activity can continue. This should include when activities must be stopped, what conditions require discussion and approval from the senior staff member responsible for EOTC before proceeding, and when the activity can proceed as planned. Operational limits can help ensure a good decision is made by the Person In Charge when they may be under pressure to continue, and that consistent decisions are made by all staff (see EOTC Safety Management Plan procedures).

Other planning considerations

- 116.** The national curriculum sets out principles that should underpin all schools' decision making. These principles should also guide decisions on EOTC. For example, the principle of 'future focus' encourages ākonga to look to the future by exploring significant issues, such as sustainability. The following reflective questions relating to sustainable practices may be useful for kaiako to consider when planning an EOTC event.
- **travel** – how can we minimise our carbon footprint? Can we car-pool, reduce distances, or use public transport?
 - **action** – is there a 'giving back' component or an action for the environment in this activity?
 - **waste** – what systems are in place to minimise and recycle our waste?
 - **food** – can we reduce packaging or use locally grown, organic food that is not overly processed?
 - **minimum impact** – how will we ensure our practices are consistent with the 'Leave No Trace | Toitū Te Whenua' programme (see Care Codes on the [Helpful Resources](#) page).

EOTC management process

Four stages of EOTC Management

- 117.** A range of tools are available to assist schools with their EOTC management. These tools support the Safety Management Plan and are in the Toolkit for EOTC Management: <https://eonz.org.nz/Resources/EOTC-Safety-Management/EOTC-Safety-Management-Plan-and-Toolkit>. The following four-stage process is recommended for EOTC management. See below, [Table 3.2](#) for more details

Stage 1: Proposal

Stage 2: Planning and preparation (people and programme management)

Stage 3: Implementation of the EOTC event

Stage 4: Post-event review and evaluation

It is up to each school to decide on appropriate timelines for each stage. Timelines may differ for different types of activities or events.

Stage 1: Proposal

- 118.** Before a proposed EOTC event is planned, initial planning approval should be gained from the person/s the board has delegated this responsibility to. Approval may be verbal or written depending on the level of risk of the activity. These people would usually include:
- the principal, and/or
 - senior staff, and/or
 - the EOTC coordinator.
- 119.** The school board is responsible for having an EOTC policy or health and safety policy that includes a statement about off-site learning. Implementation of those policies, including giving approval for EOTC events will generally be the responsibility of the principal or staff the principal has delegated responsibility to. Those with delegated EOTC approval responsibilities are expected to utilise the expertise within the school, and beyond if required.
- 120.** In general, as the level of risk increases, more senior staff should be responsible for approving the activity. The board should be informed prior to the activity.
- 121.** Different people may be delegated to approve different types of activities. See *Table 3.1* on right for suggested approvals for certain types of activity.
- 122.** Boards, in their governance role, should be assured that procedures are in place and that the principal is satisfied that the procedures have been followed.
- 123.** In approving an EOTC event, the following will be considered:
- the school's curriculum and strategic planning
 - the suitability of the activity to be inclusive of ākonga and their needs
 - safety management, including required staff competence
 - the budget.

Overseas Trips:

- 124.** Any overseas trips involving ākonga must have board approval. Before approving any travel, the board is advised to:
- complete the Decision Guide for Funding Overseas Travel Involving Students
 - prepare a detailed budget for the travel with supporting documents
 - keep a copy of the signed decision guide along with the board minutes of each decision and make these available for audit purposes
 - keep a copy of any communication with parents/caregivers. This should include details of the ownership of any fundraising amounts if the trip does not occur
 - account for all expenditure associated with the travel, including receipts, following the trip.
- 125.** There must be reasonable justification for how school expenditure supports the learning achievement of ākonga. Examples of overseas travel that may further ākonga achievement include but are not limited to: visiting the site of a significant cultural event (e.g. a battle where the school community had significant casualties), senior Māori groups visiting Pacific Islands where ancestral stories originate (e.g. Tahiti), or ākonga studying a language visiting a country where the language of study is primarily spoken.

- 126.** Further advice on overseas travel can be found on page 18 of the Financial Information for Schools Handbook: <https://www.education.govt.nz/education-professionals/schools-year-0-13/funding-and-financials/day-day-financial-management#paragraph-9126>, including the Decision Guide for Funding Overseas Travel Involving Students.

Stage 2: Planning and Preparation

- 127.** Once initial planning approval has been granted, full planning and preparation for an EOTC event can begin. At this stage:
- important information must be collected from and about all the people involved in the EOTC event, including the ākonga, parents/caregivers, staff, volunteer helpers, and contracted providers
 - the programme must be carefully planned, with risks identified, assessed, and management strategies identified, and emergency procedures outlined
 - all participants in the EOTC event should be involved in the planning. This includes staff, external providers, volunteer helpers, and ākonga.
- 128.** Before ākonga participate in an EOTC event, parents/caregivers need to be informed about the programme. Additionally, parent/caregiver consent will be required for some events, particularly those that extend outside normal school hours and/or involve more than a low level of risk. **Table 3.1** suggests the level of parent/caregiver consent appropriate for the different activity types.
- 129.** Prior to an EOTC event:
- a briefing of all staff and assistants should occur. This is to confirm understanding of roles and responsibilities and to highlight any significant risks to be vigilantly monitored.
 - all planning should be reviewed to ensure that the EOTC event will enable ākonga to meet their learning outcomes and will meet the safety requirements. Emergency procedures should also be finalised at this stage. If all is satisfactory, the EOTC event can be given the final approval to go ahead. The approval process of the school should be followed.

Stage 3: Implementation of the EOTC event

- 130.** This stage involves ākonga participating in the EOTC event. For kaiako, critical thinking, using a risk assessment lens and taking action based on sound judgement, ultimately ensures that learning and safety are maximised. Lesson plans and other planning tools from all stages underpin this stage.
- 131.** EOTC activities occur in constantly changing dynamic situations which all staff must be aware of. Appropriate decisions must be made in response to any identified change. Risks and the controls put in place to manage these should be continually monitored during the event, and appropriate decisions made as to whether to continue, adjust, postpone or cancel the event. Where operational limits have been set for an activity, these must be followed. Abandoning an event due to unacceptable risk is the correct course of action.
- 132.** It is important that clear communication occurs throughout the event with all involved to ensure that all relevant information is shared with the appropriate people is shared, especially if there are adaptations to the original plan or if there is a change in environmental conditions.

Stage 4: Post-event review and evaluation

133. After the event, it is important to debrief, reflect and evaluate so that next steps for learning can be planned and safety can be continually improved. Some focus areas for review and evaluation include:

- the learning outcomes for ākonga
- any feedback on the event from staff, ākonga, volunteers, and contractors
- effectiveness of risk management and procedural plans
- any incidents reported and reviewed
- the equipment logged, cleaned, repaired if necessary, and returned.

134. Based on the results of the review and evaluation activities, follow up may occur.

135. It is critical that lessons are learned and incorporated into EOTC programmes. Learning from past incidents is essential to improving EOTC safety. Fatality reviews have consistently revealed recurring contributing factors, indicating that previous lessons have not always been fully applied. Schools should actively support staff to adopt a fatality prevention mindset.

Self, peer, and external review

136. Schools are required to self review their policies, plans, and programmes, including, as part of the review, evaluation of information on ākonga achievement. Peer and external reviews can also assist schools to provide high quality programmes. Reviews should include:

- EOTC policy, procedures, and programmes should be reviewed as part of the school's regular review cycle and following any significant incident in the school or nationally
- each EOTC event should be reviewed to identify whether safety could be improved and whether ākonga intended learning outcomes were met
- it can be useful to invite a school with a similar EOTC programme to peer review your EOTC management systems – this could be done on a reciprocal basis
- an EOTC self audit checklist can help schools to ensure it has the required procedures in place and if the school board decides it is appropriate, it can prepare them for external review
- Education Outdoors NZ can support schools in reviewing the safety of their programmes or activities
- the Education Review Office will review the school's Health and Safety policies and processes as part of the Board Assurance Report. EOTC safety management systems will be checked as part of this, and documentation demonstrating compliance to legislation and good practice will be reviewed (see [Helpful Resources](#) page, Education Review Office link).

Safety management toolkit

137. The EOTC Safety Management Toolkit contains a selection of form templates designed to assist schools in implementing the four-stage EOTC management process described above. The forms should be adapted by schools to meet their needs and to reflect the level of risk associated with the chosen activity. The system and tools involved should be readily available to all staff. Each form details a safety management procedure (see EOTC Safety Management Toolkit: <https://eonz.org.nz/Resources/EOTC-Safety-Management/EOTC-Safety-Management-Plan-and-Toolkit>).

138. For some very low risk common activities some of the management procedures may be summarised in an email to the EOTC coordinator/senior staff member rather than using a form.

139. *Table 3.2* shows how the procedures and forms could be used across the four-stage EOTC management process. However not all forms and procedures are required for every EOTC event. The numbered Toolkit forms are listed in the appropriate planning stage.

Table 3.2: The Four Stages of EOTC Management

Stage 1 Proposal	
1. EOTC Event proposal approval and intentions form	
Stage 2 Planning and preparation	
Planning and preparation People 10. EOTC Event Checklist 7. Parent/Caregiver Information letter 8A/8B/8C. EOTC Parent/Caregiver Consent form 9. EOTC Ākonga Health Profile 4. EOTC Staff Agreement form 5. EOTC Volunteer Agreement form 12A. EOTC transport plan form 12B. EOTC Transport Drivers Agreement 12C. Transport Passenger Permission	Pre-event planning checkpoint and final approval 15. EOTC Event Checklist 1. EOTC Event proposal approval and intentions form 16. EOTC Emergency Response Guide
Programme Lesson planning process: EOTC experience planned to support teaching and learning of the school's curriculum	
Risk Management Process 2. EOTC Risk Assessment and Supervision form 3A/3B/3C. EOTC Standard Operating Procedure	
External provider 6. EOTC External Provider Agreement form	
Stage 3 Implementation of the EOTC event	
Careful observation, critical thinking and action based on sound judgement by competent staff ultimately ensure that learning and safety outcomes are met. Planning Information from stages 1 and 2 underpin this stage and will be accessible and referred to during the event.	
Stage 4 Post-event review and evaluation	
18. EOTC Event Review form 13. EOTC Equipment Lists and Log 17. EOTC Incident Report	

Providing information to parents and caregivers

- 140.** Clear and timely communication with parents/caregivers is critical. Parents/caregivers should be informed in writing about all off-site EOTC activities to enable them to give informed consent or ask further questions. The exception to this is when the event or activity is a regular part of the school curriculum and parents/caregivers have already been informed through channels such as a newsletter, email or a school app, and given their consent via a blanket consent process.
- 141.** The information given to parents/caregivers should be sufficiently detailed to ensure that they can make an informed decision about their child's participation, including the following details:
- event purpose and logistics
 - specific requirements (e.g. gear, clothing, or health needs)
 - key risks and how these will be managed
 - a reminder to update the school with any new health, cultural, or support needs.
- 142.** For parents/caregivers unable to attend briefings or for whom English and/or te reo Māori is not their first language, schools must provide appropriate alternative communication methods to help ensure they understand key information.

Blanket consent

- 143.** Blanket consent applies to low-risk local EOTC activities where it is appropriate for parents/caregivers to provide general consent. It is recommended that schools obtain this during enrolment and then renews it annually.
- 144.** The consent form for obtaining “blanket consent” should include a wide range of examples of the activities covered, the risks associated with these types of activities and the strategies the school will use to manage these risks so that parents/caregivers have the required information to make an informed decision to give consent for their child's participation.
- 145.** A “blanket consent” approach can be used for programmes that are repeated, curriculum-based experiences. For example, term activities or sports such as swimming lessons or kayaking.
- 146.** It is important that parents/caregivers are provided with reminders and updates of key details, even where “blanket consent” has been given. This includes information such as locations, timings, or gear requirements and a reminder to update the school about any health or other needs that have changed.

Individual (event-specific) consent

- 147.** Specific informed consent from parents/caregivers is required for any EOTC activity that is medium to high risk, including:
- overnight stays or residential events
 - swimming or water-based activities
 - adventure activities
 - hazardous environments (included but not limited to water, speed, height, chemicals, extreme weather conditions, technical equipment or animals)
 - overseas travel.
- 148.** Each ākonga must have a signed consent form for these events. The form should be accompanied by detailed event information and a risk disclosure section that:
- describes the main risks and how they are to be managed
 - makes clear that risk awareness is a shared responsibility.
- 149.** It should be made clear to parents/caregivers that they have the responsibility to disclose to the school any risks that their child might bring to the event, so the school has the opportunity to put effective management strategies in place. This includes any:
- medical, health, or cultural needs
 - support requirements.
- 150.** If consent is withheld, ākonga should not attend, and the school should aim to provide alternative learning pathways. Conditional consent may require an individual risk assessment.
- 151.** Consent processes are most effective when ākonga and whānau can ask questions and engage in discussion.

Medical consent and health information

- 152.** It is important to obtain medical and health information from all participants involved in an EOTC event in order to effectively manage any health issues that may arise. See **Toolkit form 18** for a guide to the items to include on your health form. It is important to keep student information, including health information, up to date. The school's student management system may be used to collect and update health information rather than requiring a separate form for each event.
- 153.** Medical professionals can be expected to carry out necessary emergency treatment without specific parent/caregiver consent in Aotearoa New Zealand (see [Helpful Resources](#) - Medical Council link), but it is possible that a doctor in another country might be reluctant to treat ākonga unless assured that the parent/caregiver had given authorisation agreeing to such treatment. For overseas trips, it is sensible to include a translation (in the relevant foreign language) of the medical consent form, as signed by the parent/caregiver.

Transport consent and safety



154. Schools should give careful consideration to transport planning for an EOTC activity because of the increased risk when transporting ākonga. Schools need to obtain parent/caregiver consent to transport ākonga in the private vehicles of staff or other adults. See **Toolkit forms 12A, 12B and 12C.**

155. Schools should have good transport policies in place and follow them. Principles to consider include the following:

- all vehicles (including personal cars) must have current registration and a current warrant of fitness (or certificate of fitness for commercial vehicles)
- all drivers should hold a current and appropriate licence for the vehicle they are driving
- all vehicles should be appropriately insured
- drivers and passengers should wear seatbelts where fitted and required. Ākonga do not have to be seated in an approved child restraint if they are travelling in a bus where no appropriate child restraint is available, however, where a safety belt is available, ākonga must use it, and where an approved child restraint is available, it must be used (where appropriate for the child's age and weight). For further information see [Helpful Resources](#) page, Driving - Good Practice Guideline
- drivers should be trained and competent to drive the vehicle in the intended traffic, road, and weather conditions (for example, city rush hour or mountain roads in icy conditions)
- the number of driving hours required for the journey and the length of the driver's working day (including non-driving hours) should be in line with Waka Kotahi NZ Transport Agency regulations (see above reference to the Driving – Good Practice Guideline).
- strategies should be in place to avoid driver fatigue (for example, having more than one driver – a second adult in the vehicle can help observe the driver and watch for

driver; and/or having planned stopping points on longer journeys for bathroom breaks and refreshments)

- there should be contingency funds and arrangements in case of breakdown or emergency
- if staff use their own cars for work, they should check with their insurance company before doing so to ensure this doesn't affect their cover
- there should be an effective supervision structure in place when travelling on buses. This becomes critical in case of an incident in transit
- the Driving – Good Practice Guideline should be understood and implemented where appropriate.

156. Due to the increased risk, it is not advisable that ākonga should transport other ākonga for EOTC activities. If a school allows this to occur, there must be a clear school policy that guides this practice, comprehensive documentation to support it and a full understanding of the risk that the school is undertaking. This applies for both curriculum based and extracurricular activities, including sport. At no time should a driver on a restricted licence be transporting other ākonga.

Early return agreement

157. Schools should inform parents/caregivers if the parents/caregivers will be expected to fund the early return of a participant whose conduct gives cause for concern on an EOTC trip. This should be included in the consent form for the event.

Emergency contact

158. Schools should ensure that parents/caregivers can contact their child via the school in the event of a home emergency and that there is a school contact number people can use after school office hours.

159. Schools must have parental/caregiver contact number(s) they can ring to provide information in the event of an incident during the EOTC event or a late arrival home. Where possible, having more than one emergency option is good practice.

Ākonga contact with parents/caregivers

160. Ākonga may wish to speak to their parents/caregivers while they are away taking part in an EOTC event. Arrangements should be agreed with parents/caregivers and ākonga before the EOTC event takes place, and these should take account of the school's policies on the use of phones during EOTC events.

CHAPTER FOUR

Staffing and supervision

Ka haere te mātātahi. Ka noho te mātāpuputu.

Youth rushes in, age deliberates.



Staffing and supervision

Cornerstones of learning safely

161. To ensure adequate staffing and supervision of EOTC activities, it is essential to have:

- competent staff
- clearly identified roles and responsibilities for all involved
- effective supervision.

Competent staff

162. The competence of staff is critical for the safety of all participants and to ensure quality learning through EOTC. Analysis of serious incidents during EOTC experiences reveal that insufficient leader competence and poor supervision have been major contributing factors. It's vital to assess the tasks involved and the skills those tasks require before establishing someone's suitability for a supervision or leadership role.

163. Competent leadership of EOTC events is inextricably linked to safety. The school board must ensure that Activity Leaders and the Person in Charge of the event have the required competence for the job. If the school does not have competent staff for the planned activity, they should either adjust the activity to match staff competence or contract a competent external provider. See EOTC coordinator **Toolkit forms 1 and 2** which provide an example of how to record competency requirements.

164. The following are recommended core competencies for EOTC Activity Leaders. Activity Leaders should have:

- the confidence to say no
- the ability to teach, instruct, and/or coach
- the ability to plan progressive development programmes
- relevant knowledge, skills, and experience
- a current first aid certificate
- the ability to identify and manage risks
- a clear focus on preventing fatalities
- crisis management skills
- leadership skills
- sound judgement
- communication skills
- group management skills
- cultural awareness
- knowledge of sustainable practices
- a supportive and inclusive approach with all ākonga.

165. The desirable personal attributes of EOTC Activity Leaders include:

- empathy
- inclusivity
- flexibility
- motivation
- a positive self-concept
- problem-solving abilities
- physical fitness
- safety consciousness
- approachability
- assertiveness.

Developing staff competence

Professional learning

166. Ongoing staff professional learning is an effective means of improving and extending competence in leading, coordinating and delivering EOTC. Schools should provide staff with opportunities to:

- gain formal training and qualifications, for example, in first aid, risk management, or activity-specific knowledge and skills
- attend Education Outdoors NZ EOTC professional learning
- co-lead with, or be mentored by, an experienced leader
- gain and log personal experience in the activity (logged experience is a prerequisite to gaining some formal qualifications in Aotearoa New Zealand)
- time to engage with good practice guidelines and resources.

Building capability

167. Principals should consider using the following approaches to build staff competence in order to address any gaps:

- tailor EOTC programmes according to available expertise
- aim to employ the best staff available, looking for those who are keen to learn and grow and so have long-term potential
- engage competent Activity Leaders (voluntary or contracted providers) to support kaiako and develop a long-term relationship with them
- build capability in the school's staff, pair more experienced staff, volunteers, or contractors with those who are less experienced for mentoring and support
- keep programming flexible in order to incorporate existing staff strengths
- match staff with complementary strengths to ensure that the supervision team as a whole have the required competence

- adjust variables, such as the location, supervision plan, or a trip's goals and activities, to match staff competence in order to ensure a programme's success
- provide professional learning opportunities for staff to help them gain the core competencies and desired personal attributes
- provide professional learning for the whole staff on the school's EOTC policy and procedures
- keep staff up to date with EOTC developments and issues through professional reading and involvement in professional associations, such as Education Outdoors NZ
- ensure the school has an EOTC Coordinator registered with the National EOTC Coordinator Network.

Outdoor leader competence

- 168.** Safe practices within outdoor activities are based on quality systems and the competence of everyone involved. A competent outdoor leader will hold a relevant qualification or will be able to demonstrate equivalency. Where a qualification does not exist (for example, for river tubing), the leader should know how to meet good practice standards for that activity. Good practice standards for different outdoor activities are available on the EONZ website: <https://eonz.org.nz/Resources/EOTC-Safety-Management/Good-Practice-Guidelines>.
- 169.** If an activity meets the definition of an adventure activity as defined by legislation, any external provider used must be a registered adventure activity operator and their competency will be independently assured for that particular adventure activity.
- 170.** Although schools are exempt from the Adventure Activities Regulations 2016, kaiako providing outdoor programmes are subject to the Health and Safety at Work Act 2015. This means that they must have the skills to do the job safely.
- 171.** EOTC events are associated with a wide range of subjects and locations. Where these events are led by subject specialists, these specialists also need to be competent to lead ākonga in the environments they are visiting. This may require the leaders to gain activity-specific outdoor training and/or qualifications (for example, bush/tramping skills for a geography trip into the high country) or contract that expertise from an external provider or contractor.
- 172.** Schools should have high expectations for the training and qualifications of outdoor leaders. While it is not mandatory in Aotearoa New Zealand to hold a qualification to lead most outdoor activities (with the exception of rafting and scuba diving), good practice standards indicate that a qualification, where available, is expected. At the very least, outdoor leaders, including kaiako, should be able to demonstrate equivalency. A claim of equivalency implies that the person making that claim has a close knowledge of the relevant qualifications and the expected performance standards. Demonstrations of equivalency should be evidence-based and endorsed by someone with a higher level of the qualification.

Training and qualification pathways for outdoor leaders

- 173.** Qualifications are available for outdoor leaders, and they provide an independent assessment of the leader's competence and good practice. These qualifications include EOTC management, first aid, and activity-specific competencies.
- 174.** A number of organisations provide training and qualification pathways suited to teachers who lead or assist with EOTC experiences. A range of activity-specific qualifications at all levels is available (see [Table 4.1](#)). Details of further training opportunities and advice is available from the following organisation Education Outdoors NZ, NZ Outdoor Instructors Association, and Adventure Works.
- 175.** The Ministry of Education has study support grants that are suited to secondary kaiako who wish to attain outdoor leader qualifications.

Table 4.1 Examples of qualifications available

Outdoor leadership level	Examples of Qualifications available
Foundation Basic knowledge fundamental to all outdoor activities	First aid (preferably Outdoor first aid)
Leader Are able to operate independently under indirect supervision, and lead participants in a specific outdoor activity, where the emphasis is on safety, in low technical yet dynamic outdoor environments.	EOTC, bush walking leader, kayak leader, mountain bike leader, rock climbing leader, abseil leader, flat water kayak, indoor climbing wall
Instructor Operate independently, provide guidance and leadership to participants during outdoor activities, and develop their competence through safe, sequenced learning experiences. Graduates can work independently, contribute to a Safety Management System, and have specialised knowledge and skills to lead and instruct a specific outdoor activity. Instruct in skills and lead groups in more technical environments.	EOTC, bush, rock, abseil, kayak, canoe, sea kayak guide, mountain bike, cave, alpine
Senior Instructor/Coach Can instruct and guide participants in complex and high-risk outdoor environments. They can also lead, mentor, and educate developing leaders and instructors in outdoor activities. Graduates extend their instructional competence in multihazard outdoor activities and can work independently under a Safety Management System. They also gain specialised skills to provide senior leadership in a specific outdoor recreation activity. Instruct in skills and lead groups in higher technical environments.	EOTC coordinator, bush, rock, alpine, mountain bike, canoe, kayak, sea kayak, cave, canyon



Pathways for sport coordinators

176. Sport coordinators in schools come to the role with a range of knowledge and skills. The role and job description of the sport coordinator may differ from school to school. Sport coordinators have a critical role to play in the safety management of sport within their school, and competitions and events that occur externally. They should be included in EOTC professional learning opportunities to ensure a coordinated safety management system across the school.

Qualification and training providers

177. Tertiary education organisations (universities, polytechnics and private training establishments) offer courses and qualifications in EOTC, sports coaching, recreation management, outdoor leadership, outdoor education, and adventure tourism. For contact details of training organisations, see [Helpful Resources](#) page, New Zealand Qualifications Authority (NZQA) website.

The team involved in planning and delivery of EOTC

178. All schools need to consider the learning intentions of the activity, the people they have around them to make it happen and who they might need to bring in to run the activity safely. During the planning phase of an EOTC event, clear roles and lines of responsibility should be established for all the team members. The allocated role or responsibility should be within the capability of the individual team member. The responsibilities and the required competencies of each role should be recorded.

179. Schools use a range of people to run and support their EOTC activities. The people involved may include kaiako, provisionally registered kaiako, support staff, external providers, contracted instructors, parents/caregivers, whānau, community volunteers, and senior ākonga as leaders. The supervision team as a whole must have the competencies required to safely deliver the EOTC event. Everyone within the team must understand and agree to their role.

Using external providers

- 180.** If an external provider is used the school should prepare an agreement for the provider's services and clarify, in writing, the provider's roles and the respective responsibilities of both the provider and the school.
- 181.** Schools have a responsibility to assess the quality of the providers used to support their programmes. A check should be made to ensure that providers are reputable and meet good practice standards.
- 182.** If any of the activities that a provider is delivering for the school is an adventure activity the provider must be a registered adventure activity operator.
- 183.** Measures to determine a provider's quality involve finding out whether the following information is available on request:
 - assurance they operate under a documented safety management system (ideally externally audited)
 - an example of their risk assessment and management tool (for example, a copy of their standard operating procedures for one of the activities)
 - assurance that all Activity Leaders have relevant and current skills and qualifications, first aid certificates, and appropriate driving licences
 - assurance that all Activity Leaders have relevant, logged, recent experience
 - referees' contact details (ensure that you contact them)
 - if they are providing adventure activities, check they are registered on the WorkSafe website as an operator, you should also ask for their registration. What we mean by adventure activity | WorkSafe: <https://www.worksafe.govt.nz/topic-and-industry/adventure-activities/what-is-an-adventure-activity/>) they are registered on the WorkSafe website (Register of Adventure Activity Operators: <https://educationgovtnz.sharepoint.com/sites/GRPMoETPASchoolGovernance/Shared Documents/EOTC/Register of Adventure Activity Operators>).
- 184.** Only providers of defined 'adventure activities' are able to be registered on the WorkSafe NZ Register of Adventure Activity Operators. There are many activities provided for schools that are not defined by the regulations as 'adventure activities' and therefore do not need to be on the register.
- 185.** Enriching Local Curriculum providers, who are contracted by the Ministry of Education, should be able to show that their EOTC management is consistent with these EOTC guidelines.
- 186.** Schools with Gateway programmes should ensure that Gateway processes are consistent with the school's EOTC policy and follow the Gateway Handbook produced by Tertiary Education Commission Gateway resources (see [Helpful Resources](#) - Fund Finder Gateway).
- 187.** Even when an external provider is contracted by the school to provide services, the school board is still ultimately responsible for ākonga safety. Therefore, a teacher involved in the event should be delegated to take this responsibility as the school's Person in Charge.
- 188.** If there is a dispute between the provider and school staff regarding a decision before or during an activity, the more conservative option must be followed (that is, the one that provides the highest standard of safety and care to ākonga).

- 189. Toolkit forms 6 and 14** provide a template for an external provider agreement between a school and a provider, and a site/venue checklist that can be used to support the contracting process.
- 190.** In contracting or hiring instructors to support delivery of a programme or activity, schools should follow good practice, such as hiring to match the scope of the activity and ensuring the instructor holds a recognised New Zealand qualification that is current. Websites such as the New Zealand Register of Recreation Providers <https://nzrrp.activecv.co.nz/> and NZOIA (<https://www.nzoia.org.nz/instructors-and-guides/find-instructor>) have information about qualified and current leaders, instructors across outdoor, fitness, aquatic activities and sport. You can also check what the qualification(s) they hold allows them to do.
- 191.** Schools that have an extensive outdoor education programme and are not subject to the adventure activities regulations should consider seeking an outdoor safety audit from a certification body or similar audit provider or an EOTC safety management system review from Education Outdoors NZ.

Contractors assessing NCEA programmes

- 192.** Where schools are using contractors to manage assessments, they must ensure they are meeting all New Zealand Qualifications Authority (NZQA) requirements. Further information about sub-contracting arrangements between a school (the consent holder) and a non-consent holder can be found on the NZQA: <https://www.nzqa.govt.nz/>

Provisionally certified teachers (PCT)

- 193.** It is up to the board to decide whether they will allow a PCT to be the Person in Charge or an Activity Leader for an EOTC event or activity if they have the relevant competence, skills, and experience for the particular activity. In most cases, it would be good practice for a PCT to be mentored before and during the event by a registered kaiako with relevant experience.

Tertiary Students

- 194.** Many schools provide opportunities for tertiary ākonga to practise and extend their teaching, coaching, and instructional skills. For example, university or polytechnic ākonga who are studying teacher education, sports coaching, recreation management, or outdoor leadership may be on a practical experience placement in a school.
- 195.** Although these ākonga are under the supervision of kaiako during their placement at the school, many bring extensive experience and sometimes qualifications relevant to an EOTC event (for example, as a kapa haka leader, sports coach, or outdoor instructor). The person in charge may decide to allow tertiary ākonga who meet good practice requirements to be an Activity Leader for an EOTC event. Others may be put in an assistant role.

Parents/caregivers, whānau, and community volunteers

- 196.** Some EOTC events require extra supervisors to supplement the school staff and contracted personnel. This need creates an opportunity for whānau and the community to get involved in ākonga learning. Such connections have the potential to make a real difference to ākonga learning outcomes.

- 197.** Productive connections between the school, the home, and the community can bring wider resources to support ākonga learning and safety. However, just inviting volunteers along to “make up the numbers” is not good practice. To add real value to ākonga learning outside the classroom, schools need to tap into the wealth of experiences, knowledge, and skills that parents/caregivers, whānau, and community volunteers can contribute. Incorporating mātauranga Māori is an essential component of EOTC and supports ākonga Māori language, culture, and identity.
- 198.** Volunteers who support EOTC events should be carefully selected by the school. Ideally, they should be well known to the school and ākonga, and have relevant knowledge, experience and skills to share, as well as proven supervisory skills. Schools should not plan to leave ākonga in the sole charge of voluntary assistants.
- 199.** Volunteers (as unpaid workers) are not required to be safety checked under the Children’s Act 2014 or Police vetted under the Education and Training Act 2020. However, schools should use a risk assessment process to decide when Police vetting is appropriate. Parents who support school trips by billeting students in their homes without payment are volunteers and are therefore not required to be safety checked or Police vetted.
- 200.** The only unpaid workers who are required to be safety checked are those working in services or schools, as part of an educational or vocational training course e.g. student teachers on practicum.
- 201.** For safety reasons, it is not advisable for Activity Leaders or volunteer assistants to bring extra children along to EOTC events. If adults do bring extra children to an EOTC event, the adults should not be included in the supervision team.
- 202.** Early in the planning stage, the Person in Charge selects the volunteers and contractors who will be group leaders, Activity Leaders, assistants, coaches, or drivers. If there is any doubt about the suitability of an adult volunteer or a contractor, further investigations should be made. If doubt remains, that adult should not be approved to participate in the event.
- 203.** School boards have the primary duty to ensure the health and safety of workers and others (including ākonga) arising from the work of the school. This means that schools must take reasonable steps to ensure that the accommodation the school is providing for ākonga and staff on school trips, including in private homes (while under the school’s care and responsibility), is healthy and safe.

Ākonga as leaders

- 204.** There are sound educational reasons for involving senior secondary ākonga as activity assistants in EOTC activities for younger ākonga. This is an excellent opportunity for them to develop their leadership skills and to strengthen vertical relationships between the different year groups within the school. Ākonga leaders can supervise groups provided they have the appropriate skills, experience, and maturity for the activity, the group, and the environment and have appropriate supervision from the Activity Leader or Person in Charge. They need to be adequately briefed and trained beforehand.

Effective supervision

- 205.** Effective supervision is a critical factor in the delivery of safe learning experiences. Staffing and supervision of any EOTC activity should be planned to ensure that any emergency situation can be dealt with effectively.
- 206.** An effective supervision plan for a large group should allow for the Person in Charge to be free from directly supervising ākonga, where possible, so that they can have an overview of the whole group. The supervision plan should still be effective if one or more of the Activity Leaders or assistants are removed to deal with an incident or if they are taken ill or injured.

Supervision structures

- 207.** It is important to develop a supervision structure or plan that ensures both quality learning and safety are maximised. Competence and clear roles and responsibilities are central to putting an effective supervision plan in place for any EOTC activity.
- 208.** Set or prescribed ratios are no longer considered good practice in educational settings. Individual event circumstances need to be considered when developing an appropriate supervision plan. A fixed ratio of adults to ākonga is too simplistic to account for the age and needs of ākonga, the nature of the activity, the location, and the competence of ākonga and staff involved.
- 209.** When EOTC events are held in foreign or remote environments or involve hazardous activities, the supervision structure should match the increased level of risk involved.
- 210.** Decisions on supervision plans should take into account, as part of the risk assessment:
- the competence of staff
 - the competence of volunteers
 - any external providers or contractors involved
 - the ages, behaviour, and ability of ākonga
 - any medical, educational, or capability needs of ākonga
 - the duration and nature of the activity (for example, land based, water based)
 - the nature of the site
 - the site requirements (for example, permits)
 - the contingency options
 - the level of first aid cover required for the activity
 - the access to emergency services
 - the season and the weather forecast.
- 211.** If in doubt, be conservative and/or seek professional advice when deciding on an appropriate supervision plan. A helpful list of professional national organisations is provided on the EONZ website (see [Helpful Resources](#)).



Examples of effective supervision structures

212. It is very important when deciding on an effective supervision plan to remember that not all adults have the experience and skills to be an Activity Leader or assistant. Here are some examples to illustrate how sound decisions can be made.

An afternoon trip to the local lake for a swim:

- the class kaiako
- six parents, who have been on EOTC events with the kaiako before, all can swim competently, understand water rescue requirements and are prepared to enter the water or be in the water during the activity
- 30 Year 7–8 ākonga who all have consent to swim, 27 ākonga are capable of swimming 50–100 metres and have demonstrated this in school swim lessons, three are less competent.

After considering all the factors above, this school decided to have one parent supervising the three ākonga with lower swimming ability in a reduced area and depth of water. The remaining ākonga were allocated evenly to the five parents (each of the parents knew the individual students they were responsible for watching and those ākonga were in a defined area). Clear boundaries and depths were set, with the kaiako (the person in charge) remaining free to supervise the overall group and paying careful attention to the group of three with lower swimming ability.

A walk through the botanical gardens involving:

- the group's two kaiako
- five parents with previous experience supervising ākonga on local excursions and one who hadn't been on an EOTC event before
- the teacher aide for one of the Ākonga
- 45 Year 3 ākonga.

After considering the factors above, this school decided on the following supervision structure with one kaiako as Person In Charge remaining free to supervise the overall group, while the other kaiako led a small group of ākonga that needed a higher level of behaviour management. The teacher aide worked with ākonga they supported in class. The rest of the group was divided among the five parents and the sixth parent who hadn't been to an EOTC event before joined the group led by the second kaiako.

A two-day, overnight, seven-a-side rugby tournament involving:

- a coach who is a kaiako
- a parent in the role of manager (this is her third overnight trip in three years as the manager and she helps throughout the year in various roles in the school's sports programme)
- a team of eleven year 11 and 12 ākonga.

In their decision making, the school considered it acceptable that should the experienced manager have to take a player to hospital, the coach who was a kaiako would manage the remaining ten ākonga. The sport coordinator had turned down another parent's offer to manage the team when it became apparent that she intended to take her toddler on the trip.



Note: If roles and responsibilities are not clarified, it is easy for Activity Leaders and assistants to be deflected from their role. The 24-hour nature of multi-day trips adds to the requirements of the supervision role, and schools are encouraged to be conservative in their decision making.

General supervision guidelines

213. All Activity Leaders and assistants should:

- be fully briefed on the activity and related safety procedures
- be assigned to a specific group of ākonga (where possible)
- have an opportunity to get to know their group early on
- carry a list of the names of all ākonga in their group, with emergency contact details and other relevant information, such as any needs that require support
- be aware of ākonga who require closer supervision
- involve ākonga in the safety procedures
- set up buddy or team support structures
- never be left alone with ākonga
- do regular headcounts of ākonga during all types of EOTC events.

Drugs and Alcohol

214. There is no place for alcohol or illegal drugs at a school EOTC event. Responsibility for supervision extends into recreation times and overnight for some EOTC events. Alcohol and illegal drugs impair a person's ability to provide a high level of supervision and to respond to an emergency.



- 215.** Care needs to be taken with certain prescription medication where drowsiness may be a side effect.

Determining staffing and supervision

- 216.** Determining the staffing and supervision required for safe and effective EOTC events can be challenging for schools. They have the flexibility to do this in a number of different ways, depending on the size of the school and the extent of its EOTC programme. Whichever way they choose, schools need:

- an inventory of EOTC events over the year, identifying the competence required to run each activity safely
- a register of the staff's existing relevant competencies e.g. a spreadsheet that records staff competencies, experience, professional development and qualifications relevant to EOTC
- use the inventory of EOTC activity competency requirements and the record of staff current competencies above to undertake a gaps analysis of any gaps between the existing staff competences and the competencies required to safely run the planned activities.



CHAPTER FIVE

Regulatory environment

He ture whenua tuaukiuki. Ma te ture tangata e pupuri

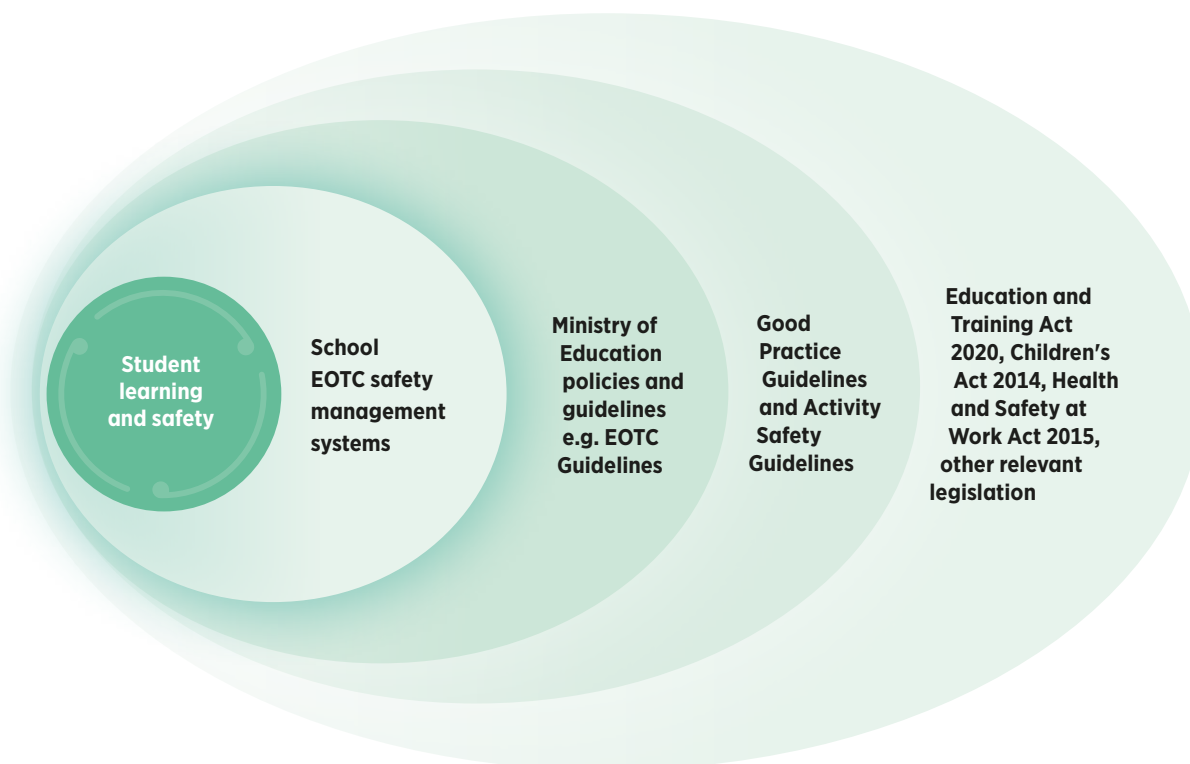
The ancient lore of the land. Be protected by human law



Regulatory environment

217. Schools operate in a regulated environment including legislative requirements (such as the Education and Training Act 2020, Children’s Act 2014 and the Health and Safety at Work Act 2015), regulations and guidelines. This is illustrated in **Figure 5.1** below.

Figure 5.1: The regulatory environment for Ākonga Learning and Safety



218. The outer layer of **Figure 5.1** shows the main statutory requirements that schools need to meet. Some of the most important statutory obligations applicable to schools in relation to their EOTC programmes are those under the Education and Training Act 2020 and the Health and Safety at Work Act 2015 and associated regulations.

219. The second layer is made up of the Good Practice Guidelines (which applies to activities outside of the Adventure Activities Regulations) and the Activity Safety Guidelines (which applies to activities covered by the Adventure Activities Regulations). See Activity Safety Guidelines for Adventure Activities: <https://www.supportadventure.co.nz/good-practice/good-practice-guidelines>.

220. The third layer of **Figure 5.1** shows that schools need to follow Ministry of Education policies and guidelines. This includes these EOTC Guidelines: Bringing the Curriculum Alive (2025). This set of guidelines supports The New Zealand Curriculum and Te Marautanga o Aotearoa and is consistent with statutory requirements and good practice standards.

221. The fourth layer of *Figure 5.1* shows that schools need to follow the safety management policies and systems that they have developed themselves based on the EONZ templates and toolkit to maximise learning and safety. Statutory requirements and Ministry of Education policies and guidelines must underpin these.

222. Central to the entire framework shown in *Figure 5.1* is ākonga learning and safety.

Governance responsibilities

223. School boards must ensure ākonga safety during EOTC events in order to meet their statutory obligations under the Education and Training Act 2020, the Health and Safety at Work Act 2015 and associated regulations, and any other legislation in force that relates to the safety of ākonga, staff, and others.

224. While school boards have overall legal responsibility to provide a safe physical and emotional environment for ākonga, they do not always have direct control over school-related activities or activities advertised through the school. Where school management and staff take on active responsibility, they must exercise this responsibility with due care and within board policy. When an external provider is contracted, it is still expected that the board will retain overall responsibility and accountability and plan accordingly.

225. Occasionally, boards and school staff may take partial responsibility for a joint community and school activity. It is important to remember that the board and staff are still expected to ensure that good practice standards are being met by all involved. They should also communicate to ākonga and parents/caregivers the extent to which school staff are involved. Boards must also realise that optional activities, such as sports trips, need to be run according to the good practice of similar curriculum-based activities.

226. Where community groups advertise through the school, the school should make it clear what the school's involvement with the group is and if the school has assessed the safety management of that group or not. This should be clearly communicated to the school community to help avoid potential misunderstandings. For example, if a local kayak club advertises through the school newsletter, the school should state they have no involvement in the club and the responsibility for checking the club are following good practice guidelines for kayaking sits with the parent/caregivers. Schools need to think carefully about external activities and/or providers they promote to the school community.

Accountability and liability

227. The school board, which includes the principal, is responsible for the safety of all ākonga and others involved in EOTC programmes.

228. If there is an incident during an EOTC event, a board may be held accountable whether the incident is caused by the actions or omissions of kaiako, volunteer assistants, ākonga, or a provider contracted by the board.

229. If there is a failure to carry out due diligence or to develop and follow policies and procedures which keep ākonga, staff, and volunteers safe during the event then the board, and/or its officers (e.g. principal), and/or its workers may be liable to prosecution.

230. Whether such accountability will mean that the board is legally liable for the incident will depend on whether the board has complied with its legal obligations when the school was planning and implementing the EOTC activity. Where the board, staff, and volunteers plan well and follow good practice guidelines, the possibility of legal liability, if anything goes wrong, will be diminished.

231. Under the Health and Safety at Work Act 2015, the board (collectively as a body corporate) could be liable for relevant offences. However, individual board members are not personally liable as they are exempted under s52 of the Health and Safety at Work Act. The principal is a paid officer of the school who does not have the same statutory immunity as elected or appointed board members and may be held liable as an individual officer.

Legislation

Legal obligations arising from legislation

232. A board's legal obligations include those set out in legislation and those arising from common law. To ensure the safety of ākonga, and employees, boards are required to comply fully with any legislation in force. The legal responsibilities of boards are set out below.

Education and Training Act 2020

233. Under section 138 of the Education and Training Act 2020, a board must have the following strategic planning documents for its school:

- a strategic plan for each 3-year period (or shorter if determined by the Secretary)
- an annual implementation plan for each year

234. A school's strategic and annual plan will reflect the board's priorities, some of which will have relevance for EOTC.

235. The board is responsible for making sure things are done, but not necessarily responsible for doing this themselves. The board may delegate tasks but the legal responsibility and accountability remains with the board.

236. If the board cannot satisfy itself that things are being done in a way that meets the school's legal obligations, including the board's policy framework, then the board is responsible for taking steps to ensure that the necessary improvements are made.

Health and Safety at Work Act 2015

237. Under the Health and Safety at Work Act 2015, the school board is a Person Conducting a Business or Undertaking (PCBU). This means it holds the primary responsibility for managing risks to the health and safety of ākonga, staff, and parent volunteers involved in EOTC activities.

238. The board's specific obligations are to ensure (so far as is reasonably practicable):

- that the work environment, plant [equipment] and systems of work that are without risks to health and safety
- the safe use, handling and storage of plant, structures, and substances.

- provide adequate facilities at work for the welfare of workers, including ensuring access to those facilities
- provide information, training, instruction or supervision necessary to protect workers and others from risks to their health and safety
- monitor the health of workers and the conditions at the workplace for the purpose of preventing illness or injury.

239. In the case of EOTC events the result of carrying out these duties should ensure that:

- i.* risks are managed to prevent harm during EOTC events
- ii.* equipment is safe to use during the event
- iii.* ākonga are supervised by competent staff
- iv.* emergency procedures are planned and followed when required.

240. Under the Health and Safety at Work Act 2015, the primary duty of care is the responsibility of the school board as a legal entity. The duty to exercise due diligence rests with individual members of the board, including the principal. Exercising due diligence in this situation involves checking carefully to make sure the school is doing all that it reasonably can and should do, to ensure the health and safety of ākonga, staff and others.

Personal protective equipment (PPE)

241. The school must ensure that any personal protective equipment is:

- selected to minimise risks to health and safety
- suitable, having regard to the nature of the work and any hazard associated with the work
- a suitable size and fit and reasonably comfortable for the person who is to wear or use it.

242. To fulfil the primary duty of care under the legislation, boards must ensure, so far as is reasonably practicable, that:

- all circumstances and activities in which the use of personal protective equipment is appropriate are identified and made known to persons undertaking that activity
- protective clothing, footwear and equipment is provided to give adequate protection against any risk or danger to their health (for example, helmets manufactured specifically for climbing as distinct from helmets manufactured specifically for kayaking)
- all personal protective clothing and equipment complies with any relevant Aotearoa New Zealand standard or code of practice and is adequately maintained
- adequate instruction is given in the use and maintenance of such protective clothing and equipment
- all individuals required to wear protective clothing, footwear and equipment do so as often as the circumstances for which they are provided arise
- any adjustment, adaptation, cleaning, repairing or maintenance to any protective clothing does not reduce the standard or quality of protection for which the protective clothing was designed, manufactured, and the manufacturers instructions were followed.

- 243.** Specific duties relating to personal protective equipment are found in the General Health and Safety at Work (General Risk and Workplace Management) Regulations 2016 see [Helpful Resources](#) for link to regulation and other health and safety information

Swimming pool policy

- 244.** If the school has a pool, it must make sure everyone who is using it with the school's permission remains healthy and safe. The management of this should be included in the school's property and facility management. This includes school community members who use the pool after school and in the holidays with the school's permission. For more information about swimming pools see [Helpful Resources](#) page, Ministry of Education – Swimming pool policy

Children's Act 2014

- 245.** The Children's Act 2014 requires specified organisations to safety check children's workers they employ or engage.
- 246.** All school boards are a specified organisation under the Children's Act.
- 247.** As a specified organisation, a board will need to consider the extent to which it employs or engages any children's workers (people whose work may or does involve regular or overnight contact with a child or children or takes place without a parent or guardian of the child, or of each child, being present). Further information to help you work through these questions see [Helpful Resources](#) page with links to key Oranga Tamariki - Safety Checking guidance.
- 248.** Parents attending a EOTC event, e.g. school camp are volunteering. Volunteers (as unpaid workers) are not required to be safety checked under the Children's Act 2014 requirements. There is also no requirement to police vet volunteers under the Education and Training Act 2020.
- 249.** However as with all child protection matters, safety of children must come first. You should consider whether volunteers at school or participating in school activities should be Police vetted even though there is not a legal requirement to do so.
- 250.** School policies and procedures should clearly indicate requirements about Police vetting volunteers.

Other legislation

- 251.** There are many other practical and legal responsibilities that may be relevant to an EOTC event, such as those that relate to employment, food safety, transport, and privacy. If you are unsure about your responsibilities, contact a relevant agency and seek professional advice.

- 252.** Schools should be wary of external providers requiring a waiver to be signed, it may indicate the provider is not clear on their legal responsibilities. A signed waiver does not release the organisation, individual staff, or any person from their legal responsibilities for the prevention of harm. A high standard of care is still owed, quality equipment is required, activities need to be supervised by competent staff, and emergency procedures need to be planned and followed. The standard expected may also change according to the circumstances and ākonga abilities. For example, when it is known that ākonga have needs that require support, what is considered reasonable will be different.
- 253.** Schools may also wish to familiarise themselves with sections 28 and 29 of the Health and Safety at Work Act which prevents contracting out of the Act and criminalises attempts to indemnify against the operation of the Act.
- 254.** Schools should obtain a parent/caregiver consent and risk disclosure procedures. Obtaining valid informed consent requires more than a sentence or two about generic risk acceptance. Schools should provide enough specific information to parents/caregivers about the risks inherent in the planned EOTC event, to enable them to adequately understand what they are consenting to. This may require schools to use a range of resources (like short videos of the activity or the provider's website) and to manage any language or communication issues. See **Toolkit form 7** for an example of what information should be included in an information letter to parents/caregivers requesting consent and forms 8A, 8B and 8C.

Formal sources of good practice

- 255.** To meet statutory health and safety requirements, organisations must be able to demonstrate that their practices are consistent with professional standards of safety. Such standards are contained in codes of practice and good practice guidelines.
- 256.** Where codes of practice are not available, good practice becomes the standard. Information about good practice is available through formal and informal sources. Formal sources of good practice include activity guidelines and manuals and the Support Adventure website: Good Practice Guidelines: <https://www.supportadventure.co.nz/overview/good-practice/>
- 257.** Schools should be able to show that EOTC activities comply with the relevant code of practice or, in its absence, with good practice standards for that activity.
- 258.** Good Practice Guidelines have been developed for a number of outdoor activities that schools will participate in (including a good practice guide for driving) which you can download and edit for your EOTC activities. Good Practice Guidelines are the standard for an activity when there is not a Code of Practice or Activity Safety Guideline for that activity. They can be accessed at Good Practice Guidelines, see [Helpful Resources](#).
- 259.** Activity Safety Guidelines have been developed for a number of outdoor activities that are classified as adventure activities under the Health and Safety at Work (Adventure Activities) Regulations 2016. They can be accessed through Support Adventure see [Helpful Resources](#). When relevant ASGs are available it is strongly recommended they are implemented. If a guideline isn't adopted, an organisation must be able to justify the way they are working is at least as good.

- 260.** Good practice evolves, so it is important that a school's management system ensures its policies, procedures and training are all kept up to date. What was accepted practice in the past may not be acceptable today or in the future.

The National EOTC Coordinator Network

- 261.** Registration of a school's designated EOTC coordinator or senior leader with EOTC responsibilities on the National EOTC Coordinator Network is essential to meet good practice requirements. Registration ensures the EOTC coordinator will receive direct support for their role, including any need-to-know information such as changes to good practice, new health and safety information and outdoor sector updates. An annual EOTC review is recommended to keep the school's registration current – this should include checking and updating EOTC coordinator details. Registration is through Education Outdoors New Zealand at National EOTC Coordinator Network: <https://eonz.org.nz/Home/National-EOTC-Coordinator-Network> and at no cost to the school.

Informal sources of good practice

- 262.** If there are no formal guidelines documented for a particular activity, schools should establish that their practices are consistent with those of their professional peers who also run that activity.
- 263.** When trying to establish good practice for an activity that does not have a written manual or guidelines, the following options are available to schools:
- contact one or two schools that run the same activity and find out what their current practices and procedures are for running the activity
 - contact a related organisation that runs the activity, for example, a recreation centre or youth organisation, and find out what their current practices and procedures are for running the activity
 - consider collaborating with these groups to document your agreed practices and procedures for the activity.
- 264.** If the school receives variable or conflicting advice from different sources, it would be prudent to follow the advice that provides the highest standard of care for ākonga.

Determining whether good practice standards are met

- 265.** Accessing the relevant code of practice or good practice standards for an outdoor activity is relatively easy. The more difficult task is to determine whether your school, or an external provider you wish to engage, actually meets these standards. See [Helpful Resources](#) pages for links to Good Practice guidance.

“ You have kids who shine when they're outdoors who don't do that in the classroom ... you can see these kids coming out of nowhere to be leaders”. – *Kaiaako*

CHAPTER SIX

Emergency preparedness

He kōhatu taka i te pari e kore e taea te whakahokia.

A stone fallen from the cliff can never be returned.



Emergency preparedness

Planning for emergencies

266. There are various ways in which schools can prepare themselves for responding to an emergency situation or a traumatic incident where the well-being of ākonga, staff or parents/caregivers is affected. Schools will find the Ministry of Education's emergency and traumatic incidents preparation and response information on the Helpful Resources page.

267. Schools' legal responsibilities for health and safety are set out in the Health and Safety at Work Act 2015. Schools must ensure that risk and incident reviews and analysis are used to inform emergency planning. Emergency procedures must be developed for EOTC events to ensure that ākonga, staff, and volunteers are fully informed and prepared to deal with or respond to emergencies or potential risks during an EOTC event.

Incident

268. An incident is an event where there was, or might have been, harm (physical or emotional) to people, damage to property, or interruption to process. Incidents include any event where intervention was required, for example:

- death or serious injury of an ākonga, staff member or volunteer
- witnessing serious injury or death of an ākonga, staff member or volunteer
- any situation where there was a 'near miss', for example, an ākonga falls off a flying fox before it leaves the platform and is uninjured but could have been injured seriously or fatally if it had happened once they were off the platform
- threats to safety of ākonga, staff members or volunteers, including the presence of an individual behaving in a threatening manner
- physical or sexual abuse
- theft or vandalism
- lost or missing ākonga, staff member or volunteer.

Emergency Response Guide

269. An Emergency Response Guide should include:

- specific emergency response plans for each type of harm that could occur within the EOTC programme
- contact details for the school, medical and emergency assistance.

270. An emergency response procedure should be written for each identified type of risk (potential harm) as part of the risk management planning process for an EOTC activity. An emergency response plan sets out, step by step, how to manage each potential emergency or incident and what resources and equipment are required. Emergency response plans deal with managing the incident itself in the short term. See **Toolkit form 16**, Emergency Response Guide.

- 271.** There is commonality in the type and order of steps taken to manage any emergency so when emergency response plans use similar steps an effective and consistent response from staff can be expected. These procedures combined with critical school contacts and emergency assistance numbers form the school's Emergency Response Guide. This guide should be consistent with the school's traumatic incident response plan (TIRP).

School-wide Emergency Management Plan

- 272.** Schools are expected to have a policy responding to an emergency or a traumatic incident. A traumatic incident during a EOTC event/activity can be a stressful and challenging for all involved. As a sudden and unexpected event, having a prepared plan and steps to follow can lessen the impact and accelerate recovery.
- 273.** The Emergency Response Plan is designed to take over from the immediate emergency response and guide the medium to longer term response. After an emergency or any incident affecting wellbeing, the focus should be on supporting recovery. Schools need to consider what systems and procedures will best assist ākonga, staff, volunteers, and other adults in the school community following a traumatic event. The goal is to aid recovery and to reduce the longer-term potential for further harm.
- 274.** A school-wide emergency management plan should include (at least):
- a planned procedure to follow to minimise further risk (physical and emotional) after an EOTC incident
 - include a list of who to contact in the event of an incident, for example, police, principal, board presiding member, kaumatua, Ministry of Education
 - a protocol for steps to take immediately following a death or serious incident (ensure safety of all others, manage triage – including appropriate care of injured and/or care of the bodies of those who have died, preserve the scene until the Police or relevant authorities arrive to help and inspect the scene – leave all equipment as is, photograph the scene)
 - details of the agencies that must be contacted, for example, WorkSafe, Maritime New Zealand
 - a media plan including a designated spokesperson (usually the principal or board presiding member)
 - systems that support school continuity and the return to regular routines and structures
 - systems to identify and support ākonga, staff members or volunteers who are vulnerable
 - systems that will provide immediate crisis intervention such as having easy access to
 - factual, accurate, timely information about the event or incident
 - opportunities to clarify and understand information about the event
 - age and culturally appropriate activities to support this understanding
 - information on psychological needs and mental health issues
 - information on coping strategies
 - resources for assistance if needed
 - connecting with others.



275. For more information see the Traumatic Incidents guides for wellbeing and Incident Management: <https://www.education.govt.nz/education-professionals/schools-year-0-13/health-and-safety/respond-school-emergency-or-traumatic-incident>

Traumatic Incident response support

276. Schools can access support when an incident has occurred by contacting their Director of Education based in the **Ministry regional office** or their **local special education office**, or through calling the traumatic incident teams: 0800 TI TEAM (0800 848 326).

Communications plan

277. Schools should have a communications plan in place for EOTC events. Relevant parts of the plan should be incorporated into the school's EOTC Emergency Response Guide and School-wide Emergency Management Plan, and should include communication:

- within the school (board, staff, ākonga, parents/caregivers)
- between the school and the location of the EOTC event
- between different groups involved in the event (if groups are operating independently for periods of time)
- with emergency services
- with WorkSafe or other relevant agencies
- with the media.

278. The means of communication should be appropriate for the purpose. Depending on the location, environment and groups of people involved, communication could be via one or several of the following examples: landline or satellite cell phone, mountain radio, VHF

radio, personal locator beacon, spot trackers, computer-based communications (email or Voice over Internet Protocol), pencil and paper, and signalling devices such as a whistle or mirror.

Cell phone use

- 279.** In the event of an incident, clear communication regarding cell phone use including messaging and posting on social media by ākonga, volunteers and staff will be important. This will be more effective if there is a clear procedure on cell phone use that is communicated and understood by everyone involved before the event starts.
- 280.** The school should ensure that ākonga cell phone use on EOTC events is consistent with their school policy.

Communication tree

- 281.** A communications tree should be developed as part of the school's emergency procedures planning. This should consider who communicates with whom, and involve the following key people/organisations:
- presiding member
 - principal
 - EOTC coordinator
 - Person In Charge (PIC)
 - staff
 - ākonga
 - parents/caregivers/whānau
 - ākonga's emergency contacts
 - emergency services
 - other relevant agencies e.g. mental health services
 - WorkSafe New Zealand
 - school community
 - school traumatic incident team members
 - MOE 0800 TI Team (if needed).

Media management plan

- 282.** The school's Emergency Management Plan should include a media management plan. Boards need to appoint a dedicated person to deal with questions from the media if there is a serious injury or death. This would usually be the principal and/or the board presiding member. All other staff and board members must understand that they should not make any comment to a member of the media and must instead direct journalists to the dedicated media liaison. Only the appointed spokesperson should speak to the media.
- 283.** It is also important for staff and ākonga not to post comments about the incident on social media as these may be used by journalists looking for quotes.

284. When planning for the media, it's recommended that the school:

- appoint a media spokesperson (usually the board presiding member or principal) to take responsibility for all communication with the media
- recognise the right of the media to ask questions
- recognise that they will be trying to find a story
- develop a written media statement (should be developed by the school's Incident Management Team and checked for sensitivity and accuracy). It may not be needed but best to be prepared
- be prepared for TV media interest in a high impact event. Camera crew and reporters can be asked to leave school property, but they may remain outside the gates and may ask whānau or ākonga questions. Ākonga in particular can be vulnerable to this so giving them information on how to behave if confronted by the media can be helpful
- be prepared for media interviews after major events and designate a place that could serve as a media interview site, ensuring it is away from ākonga and kaiako (off-site is preferable)
- consider seeking external support, if required.

Advice for media spokesperson

285. A protocol needs to be put in place for dealing with media. When a journalist gets in touch, make it clear that the designated media spokesperson will call them back about the specific information they are requesting. In the meantime, find out:

- who is calling
- what organisation they represent
- their contact details
- the nature of their inquiry
- what sort of interview they want if they are wanting an interview, i.e. a radio or television interview that is pre-recorded or live
- if the journalist has specific questions they would like answered.

286. When an interview is agreed to, it is recommended that the questions that will be asked are sent prior to the interview so responses can be prepared and only those questions responded to:

- use the interview or media statement to:
 - discuss positive steps taken to address the incident and try to get the media to support the response by reporting where concerned people can go for further support
 - emphasise the primary goal of the school is to help ākonga, kaiako and whānau to get through the situation and get back to normal as quickly as possible
 - do not give assurances that may later prove to be unwarranted, such as, 'everything is under control'

- it is important that the media spokesperson takes control of the situation by responding when they are prepared rather than being caught off guard
 - say only those things you are confident of saying and are factual and avoid getting into discussion or speculation
 - take your time and if you don't know, say so
 - when interviews are over the spokesperson should avoid entering into general discussion or give 'off the record' statement – there is no such thing
- inform bereaved whānau of any statements prior to release to media and inform them if the school's spokesperson will be interviewed, by whom and when.
- ensure all staff are briefed on all aspects of media involvement
- the system for the front desk person to respond to phone calls/visits from media should ensure that rather than the call being put through to the spokesperson immediately, or seeing if they are available to meet, the caller is informed that the spokesperson will contact them as soon as possible
- it can be helpful to prepare a script for the front desk person to adhere to, as well as one for the spokesperson. Some questions from media personnel can catch people off guard and they may give information they didn't intend to
- a log to record the names and contact numbers of journalists and their organisations should be kept, and a record of all media statements made by the school and news clippings kept
- in high level interest events schools might consider contracting a specialist in communications and media liaison advice.

287. A suggested interview checklist is provided below:

Do ✓

- Do** run through with the journalist beforehand what they want to ask.
- Do** stick to what you know.
- Do** remember to use key messages.
- Do** treat it like a conversation and try to relax.
- Do** use plain language and avoid slang, jargon and acronyms or initialisms.

Don't ✕

- Don't** be afraid to show emotion if the interview is about a serious injury or death.
- Don't** make personal comments.
- Don't** criticise other people or organisations.
- Don't** speculate by being drawn into answering 'what if' questions.
- Don't** say "No comment." If you don't know the answer, say so.
- Don't** give long answers, keep them short and simple.
- Don't** focus on the camera or microphone. Engage with the journalist.

Incident recording, reporting, and analysis

- 288.** Every incident provides an opportunity for learning and should be recorded using a standard incident report form (**Toolkit form 17**) and reported to the appropriate person within the school. Some incidents will require external reporting if they meet the criteria for a notifiable event.
- 289.** Most schools will have a standard incident reporting form that is required to be completed for any school incident regardless of where it occurs. If this is the case, the incident report form template in the EOTC toolkit (**Toolkit form 17**) can be used to check the school's format for the necessary and useful information that allows for the incident to be investigated and learnt from.
- 290.** The school needs to notify the regulator (WorkSafe NZ) of the event as soon as possible after becoming aware that a notifiable event has occurred. For information see WorkSafe information on the [Helpful Resources](#) page.
- 291.** Section 57 of the Health and Safety at Work Act 2015 requires school boards (as PCBUs) to keep a record of each notifiable event for at least 5 years from the date on which notice of the event is given to the regulator (WorkSafe NZ).

Duty to preserve sites

- 292.** When a notifiable event has occurred, the school must take all reasonable steps to ensure that the site where the event occurred is not disturbed until authorised by an inspector.
- 293.** This duty does not prevent any action:
- a.** to assist an injured person or
 - b.** to remove a deceased person or
 - c.** that is essential to make the site safe or to minimise the risk of a further notifiable event or
 - d.** that is done by, or under the direction of, a police officer acting in execution of their duties or
 - e.** for which an inspector or the regulator has given permission.

Incident analysis and review procedure

- 294.** Schools must analyse individual incidents to discover underlying causes and to determine what factors caused the situation (**Toolkit form 17** provides a structure to do this). Schools should have an incident review procedure outlined in their EOTC procedures or school-wide Health and Safety system. A school safety committee composed of the EOTC coordinator, principal, and suitable safety or outdoor expert/s could carry out this review. However, for serious incidents, it is desirable to have an external review. Schools should consider sharing the lessons from reviews with other schools or through Education Outdoors NZ: <https://eonz.org.nz/contact-us/> so that others can avoid a recurrence.
- 295.** Maintaining a register of incidents that harmed (or might have harmed) any person during an EOTC event allows the school to analyse incidents and identify any trends or patterns and actions that have been taken in response to incidents. This analysis can indicate areas that need improvement or actions that need to be put in place. It should form part of the annual EOTC review.

Statutory investigations

- 296.** In the case of notifiable injury or illness, incident or event during an EOTC event, schools should expect there to be a formal investigation. Statutory authorities that have the responsibility to carry out an investigation include the police, the office of the coroner, WorkSafe NZ, Maritime New Zealand, and Waka Kotahi. In some cases, more than one authority may conduct investigations, for example, the police together with WorkSafe NZ.
- 297.** If a statutory authority is conducting an investigation into an EOTC notifiable injury or illness, incident or event, schools should expect to be interviewed and to provide information for the investigation.

First aid

- 298.** Boards must ensure that persons injured at school or in any school-related activity have ready access to a qualified first aider and adequate first aid supplies, this requirement extends to EOTC. Each first aid treatment must also be recorded in a register.
- 299.** Boards must ensure that a register of incidents that receive first aid is kept that records:
- the nature of every first aid treatment given in the school or on an EOTC event
 - the date on which it was given
 - the name of the person that received first aid treatment
 - the nature of the injury or illness for which first aid was administered
 - the date, time, and place the incident occurred
 - the cause of the incident
 - any other relevant circumstances leading to, during, and after the incident
 - whether the injured person was referred to a doctor or nurse
 - the name of the person that administered first aid treatment.
- 300.** Most student management systems are capable of maintaining a first aid treatment register.

Qualified first aiders

- 301.** There is no requirement to have a specific number of qualified first aiders in a workplace or to have a specific type of first aid certificate. However, all ākonga must have ready access to a qualified first aider. School boards need to decide how best to achieve this. For example, a school may arrange for the Red Cross to attend an inter-school sports day. However, for a school camp with five groups of ākonga doing different outdoor activities in different locations each day, each Activity Leader or an assistant would need to have a first aid certificate, preferably one relevant to outdoor activities.

First aid supplies

- 302.** WorkSafe NZ has guidance relevant to a school board's planning and decision-making processes (see [Helpful Resources](#) page Aid for Workplaces – A Good Practice Guide).

303. Boards must ensure that:

- first aid kits are available to be taken on every EOTC event
- the number, location, and contents of first kits should meet the needs of the specific EOTC event
- first aid supplies are kept clean and tidy and accessible for the treatment of injured people (the kits should protect contents from damp and dust and should be clearly identified as first aid kits)
- first aid supplies are available and easily accessible without delay during the EOTC event to anyone requiring them during EOTC event
- all staff and volunteers are aware of the location of first aid supplies.

304. Decisions about what to include in a first aid kit should be based on the first aid needs identified during the EOTC event risk assessment. A suggested group first aid kit contents list that is tailored for an outdoor context can be found at Outdoor First Aid Kit List (see [Helpful Resources](#) page).

305. Where particular hazards exist in an EOTC location, the mobile kit should contain additional contents. For example, in a high-wasp area, an EpiPen or anaphylaxis kit may be included or a mouldable splint for remote trips.

306. Check if an Automated External Defibrillator (AED) is available onsite (whether at your school or other venue e.g. residential camp site, sports venue) or the nearest location and ensure staff and ākonga, depending on their maturity and age, are informed about where it is located and when and how to use it appropriately.

307. First aid equipment must be checked regularly and replenished promptly after use to ensure supplies remain adequate. Expired items must be replaced before their use-by dates.

Person in charge of first aid

308. Boards must ensure the person in charge of first aid or their delegate may need to be available beyond school hours, especially during residential events. The Person in Charge should also keep a list of staff and others with current first aid certificates and ensure that these people are deployed appropriately during an EOTC event. Some student management systems have a Staff Manager section, where it may be useful to record whether a staff member holds a current first aid certificate.

Helpful Resources



Helpful Resources

Adventure Works

- › EOTC coordinator and leader qualifications:
<https://www.adventureworks.co.nz/strand-qualification/eotc-instructor-qualifications#level5>
- › Outdoor instructor qualifications: <https://www.adventureworks.co.nz/qualifications>

Care codes and preparation

- › Department of Conservation Parks and Recreations - Know Before You Go:
<https://www.doc.govt.nz/parks-and-recreation/know-before-you-go>
- › Leave No Trace NZ Toitu Te Whenua: leave no trace principles:
<https://leavenotrace.org.nz/>

Education Outdoors New Zealand (EONZ)

- › All tool forms referred to in this EOTC guidance document can be found in the downloadable resource at this link: <https://eonz.org.nz/Resources/EOTC-Safety-Management/EOTC-Safety-Management-Plan-and-Toolkit>
- › Safety Management resources:
<https://eonz.org.nz/Resources/EOTC-Safety-Management>
- › Safety Management Plan and Toolkit (including coordinator toolkit):
<https://eonz.org.nz/Resources/EOTC-Safety-Management/EOTC-Safety-Management-Plan-and-Toolkit>
- › Coordinator Network: <https://eonz.org.nz/Home/National-EOTC-Coordinator-Network>
- › Professional Development: <https://eonz.org.nz/PLD-Event>
- › Good practice guidance:
<https://eonz.org.nz/Resources/EOTC-Safety-Management/Good-Practice-Guidelines>
- › Key resources from other organisations:
<https://eonz.org.nz/Resources/EOTC-Safety-Management/Key-Resources-from-the-Ministry-of-Education-and-Partner-Agencies>

- › EpiPens in EOTC First Aid Kits - FAQs:
<https://eonz.org.nz/Resources/EOTC-Safety-Management/EOTC-FAQs>
- › Driving - Good Practice Guideline:
<https://www.supportadventure.co.nz/assets/Driving-Good-Practice-Guideline-v1.pdf>
- › Learning from the past – fatality prevention:
<https://eonz.org.nz/Resources/EOTC-Safety-Management/Fatality-Prevention-Mindset>
- › Education outside the classroom in Aotearoa New Zealand – a comprehensive national study: final report: <https://eonz.org.nz/Resources/Research>
- › Resources for menstruation and rainbow inclusive practices:
<https://eonz.org.nz/Resources/Menstruation-Rainbow-Inclusive-Practices>
- › Contact information and form: <https://eonz.org.nz/Contact-Us>

Education Review Office

- › Board audit and assurance statement checklist:
<https://ero.govt.nz/how-ero-reviews/how-ero-reviews-schoolskura-english-medium/Te-Ara-Huarau/The-Board-Assurance-Statement-and-Self-Audit-Checklists>

Medical Council Standards

- › Information on informed consent:
<https://www.mcnz.org.nz/our-standards/current-standards/informed-consent/>
- › Information about a doctor's duty during an emergency:
<https://www.mcnz.org.nz/our-standards/current-standards/medical-emergencies-a-doctors-duty-to-help/>

Ministry of Education

- › Ka Hikitia – Ka Hāpaitia: The Māori Education Strategy:
<https://www.education.govt.nz/our-work/overall-strategies-and-policies/ka-hikitia-ka-hapaitia#About>
- › Action Plan for Pacific Education 2020–2030:
<https://www.education.govt.nz/our-work/strategies-policies-and-programmes/action-plan-pacific-education/action-plan-pacific-education-2020-2030>

- › New Zealand Disability Strategy:
<https://www.whaikaha.govt.nz/about-us/programmes-strategies-and-studies/programmes-and-strategies/new-zealand-disability-strategy>
- › Healthy and safety information:
<https://www.education.govt.nz/education-professionals/schools-year-0-13/health-and-safety>
- › Preparing for an emergency or traumatic incidents:
<https://www.education.govt.nz/education-professionals/schools-year-0-13/health-and-safety/prepare-emergency-or-traumatic-incident>
- › Responding at school to an emergency or traumatic incident:
<https://www.education.govt.nz/education-professionals/schools-year-0-13/health-and-safety/respond-school-emergency-or-traumatic-incident>
- › Financial information for schools handbook Overseas travel page 17:
<https://www.education.govt.nz/education-professionals/schools-year-0-13/funding-and-financials/day-day-financial-management#paragraph-9126>
- › Privacy information: <https://www.education.govt.nz/legal-and-privacy>
(Also see Office of the Privacy Commissioner: <https://www.privacy.org.nz/>)
- › Regional offices contacts:
<https://www.education.govt.nz/our-work/our-role-and-our-people/contact-us/regional-ministry-contacts>
- › Local special education office: <https://www.education.govt.nz/our-work/our-role-and-our-people/contact-us/regional-ministry-contacts/learning-support-services/>
- › Swimming pool policy: <https://www.education.govt.nz/education-professionals/schools-year-0-13/property/health-and-safety-standards-running-school-pool#paragraph-7682>

Oranga Tamariki

- › Working with children safety checking guidance:
<https://www.orangatamariki.govt.nz/working-with-children/childrens-act-requirements/safety-checking/>

Outdoors Instructors Association (NZOIA)

- › NZOIA qualification information: <https://www.nzoia.org.nz/>

Qualifications Authority (NZQA)

- › Qualification information: <https://www2.nzqa.govt.nz/>

Register of Recreation Professionals

- › NZRRP - New Zealand Register of Recreation Professionals: <https://nzrrp.activecv.co.nz/>

Sports NZ

- › Coach development information:
<https://sportnz.org.nz/coaching-and-development/coach-development/>

- › Growing coaches and leaders overview:
<https://sportnz.org.nz/resources/growing-coaches-overview/>

Support Adventure

- › Good practice guidance:
<https://www.supportadventure.co.nz/advice-resources/general-2/good-practice-2/>

- › Activity safety guidelines:
<https://www.supportadventure.co.nz/risk-management/participant-safety/>

- › First aid suggestions: <https://www.supportadventure.co.nz/advice-resources/general-2/key-emergency-information-2/>

Tertiary Education Commission

- › Fund Finder Gateway: <https://www.tec.govt.nz/funding/funding-and-performance/funding/fund-finder/gateway>

WorkSafe

- › Adventure Activity guidance: <https://www.worksafe.govt.nz/topic-and-industry/adventure-activities/what-is-an-adventure-activity/>

and information for schools, education providers and clubs: <https://www.worksafe.govt.nz/topic-and-industry/adventure-activities/information-for-schools-education-providers-and-clubs/>
- › Adventure Activity Operators register: <https://wsplatform.powerappsportals.com/adventure-activities-public-register/>
- › First aid at work general requirements: <https://www.worksafe.govt.nz/managing-health-and-safety/businesses/general-requirements-for-workplaces/first-aid/>
- › Incident Notifications: <https://www.worksafe.govt.nz/notifications/>

Key legislation

- › Children's Act 2014: <https://www.legislation.govt.nz/act/public/2014/0040/latest/whole.html>

and the regulations for safety checks of children's workers: https://www.legislation.govt.nz/regulation/public/2015/0106/latest/DLM6482241.html?search=ts_act%40bill%40regulation%40deemedreg_vulnerable+children_resel_25_a&p=1
- › Education and Training Act 2020: <https://www.legislation.govt.nz/act/public/2020/0038/latest/LMS170676.html>
- › Health and Safety at Work Act 2015: <https://www.legislation.govt.nz/act/public/2015/0070/latest/DLM5976660.html>
- › Health and Safety at Work (General Risk and Workplace Management) Regulations 2016 (see s17 for duties relating to personal protective equipment): <https://www.legislation.govt.nz/regulation/public/2016/0013/latest/dlm6727530.html>
- › Health and Safety at Work (Adventure Activities) Regulations 2016: <https://www.legislation.govt.nz/regulation/public/2016/0019/latest/DLM6725703.html>
- › Privacy Act 2020: <https://www.legislation.govt.nz/act/public/2020/0031/latest/LMS23223.html>

Glossary

Terms have the following meanings for the purposes of these guidelines

Good practice In the absence of a formal standard or code of practice, good practice becomes the standard for an activity. Usually, national organisations agree on a range of acceptable practices to run an activity safely and document these practices in guidelines. Good practice evolves, so keeping up to date is important.

If there are no formal, documented guidelines, schools should establish that their practices are consistent with those of their professional peers in the field. If there is disagreement on the good practice/s to use, then the practice/s that provide/s the highest standard of care for ākonga should be the one/s followed.

Other publications may use the terms “current, accepted practice” or “best practice” to describe good practice.

Adventure activities Adventure activities create challenge and excitement by deliberately exposing participants to elements of risk. The risks could be physical (for example, injury), social and/or emotional, or material (for example, damage to gear or equipment). In an educational setting, activities are usually promoted that have a greater degree of learner-perceived risk but a lower degree of residual risk (see the definitions of “risk” in this glossary). Both natural and constructed environments can be used for such activities.

The Adventure Activities Regulations define the type of adventure activities to which they apply.

A summary guide to interpreting this regulation is available at WorkSafe NZ: <https://www.worksafe.govt.nz/topic-and-industry/adventure-activities/information-for-schools-education-providers-and-clubs/>

Adventure-based learning (ABL) ABL activities are commonly sequenced to include cooperative games, trust-building activities, and problem-solving and decision-making activities, and the challenges can include low- and high-ropes courses. Debriefing and reflection based on the activities encourage and develop participants' skills in communication, trust, goal setting, leadership, and taking responsibility. Participation fosters ākonga personal and social development.

Challenge by choice Challenge by choice means the participant chooses their own level of challenge within a supportive peer environment.

Direct supervision	Direct supervision is when the person supervising is in a position to be able to physically intervene and proactively manage anticipated risks.
Education for sustainability (EfS)	EfS fosters the capacity of people to be informed and active participants in society moving towards ecological, social, cultural, and economic sustainability. The key goals of sustainability are to live within our environmental limits, to achieve social justice, and to foster economic and social progress while developing a quality of life for all. EfS was formerly known as environmental education.
EOTC event, activity, experience of programme	<p>In a school, EOTC may be referred to as an event, an activity, an experience or a programme, depending on the context.</p> <p>For the purposes of this document, these terms are interchangeable.</p>
Equivalency	<p>Equivalency means an alternative to a qualification, which indicates that an outdoor leader meets the requirements listed in the relevant qualification's syllabus. Organisations should be able to justify the equivalency decisions they make, including the documentation that they have considered in making their decisions. Outdoor leaders may indicate equivalency by one or more of the following:</p> <ul style="list-style-type: none"> › attestation from an independent assessor-level expert › referees' statements › record of recent experience meeting the qualification requirements › a training record › other relevant qualifications (including similar overseas qualifications) › observation › a field check › appraisals conducted by an assessor-level expert.
Incident	<p>An incident is an event where there is, or might be, harm to people, damage to property, or interruption to process. Incidents include any event where intervention is required, for example, a fatality, a near miss, an injury, an illness, property damage, or a behavioural problem that leads to, or might lead to, harm.</p> <p>Studies indicate that there are many more near misses than actual harm, which means that incident registers should record more near misses than actual harm. If this isn't the case, your school is missing many learning opportunities to make your EOTC programmes safer.</p>

Indirect supervision

Indirect supervision is when the person supervising is able to communicate with the person being supervised but may not be able to physically intervene to manage risks should they develop. There are two types of indirect supervision - proactive and reactive:

- › proactive indirect supervision is where the supervising staff member is actively monitoring the participant and is in a position to provide verbal assistance to intervene and manage risks should they develop
- › reactive indirect supervision is where the supervising staff member is in a position to communicate verbally and provide assistance to a participant when it is sought but may not be actively monitoring the participant or providing pre-emptive assistance.

Enriching Local Curriculum (ELC)

Previously known as Learning experiences outside the classroom (LEOTC) is a Ministry of Education curriculum support project. It contributes (through contestable funding) towards curriculum-linked programmes for ākonga, run by a range of organisations, such as zoos, museums, art galleries, performing arts centres and outdoor providers.

Must

In this document, “must” is used in reference to a non-negotiable policy that has to be followed. Such policies are based on statutory requirements.

Notifiable events

In the Health and Safety at Work Act 2015, unless the context otherwise requires, a notifiable event means any of the following events that arise from work:

- a.** the death of a person
- b.** a notifiable injury or illness
- c.** a notifiable incident.

Notifiable incidents

In the Health and Safety at Work Act 2015, unless the context otherwise requires, a notifiable incident means an unplanned or uncontrolled incident in relation to a workplace that exposes a worker or any other person to a serious risk to that person's health or safety arising from an immediate or imminent exposure to:

- a.** an escape, a spillage, or a leakage of a substance
 - b.** an implosion, explosion, or fire
 - c.** an escape of gas or steam
 - d.** an escape of a pressurised substance
 - e.** an electric shock
 - f.** the fall or release from a height of any plant, substance, or thing
 - g.** the collapse, overturning, failure, or malfunction of, or damage to, any plant that is required to be authorised for use in accordance with regulations
 - h.** the collapse or partial collapse of a structure
 - i.** the collapse or failure of an excavation or any shoring supporting an excavation
 - j.** the inrush of water, mud, or gas in workings in an underground excavation or tunnel
 - k.** the interruption of the main system of ventilation in an underground excavation or tunnel
 - l.** a collision between 2 vessels, a vessel capsizes, or the inrush of water into a vessel
 - m.** any other incident declared by regulations to be a notifiable incident for the purposes of this section.
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**Notifiable
injury or illness**

In the Health and Safety at Work Act 2015, unless the context otherwise requires, a notifiable injury or illness, in relation to a person, means:

- a.** any of the following injuries or illnesses that require the person to have immediate treatment (other than first aid):
 - i.** the amputation of any part of his or her body
 - ii.** a serious head injury
 - iii.** a serious eye injury
 - iv.** a serious burn
 - v.** the separation of his or her skin from an underlying tissue (such as degloving or scalping)
 - vi.** a spinal injury
 - vii.** the loss of a bodily function
 - viii.** serious lacerations.
- b.** an injury or illness that requires, or would usually require, the person to be admitted to a hospital for immediate treatment
- c.** an injury or illness that requires, or would usually require, the person to have medical treatment within 48 hours of exposure to a substance
- d.** any serious infection (including occupational zoonoses) to which the carrying out of work is a significant contributing factor, including any infection that is attributable to carrying out work:
 - i.** with microorganisms
 - ii.** that involves providing treatment or care to a person
 - iii.** that involves contact with human blood or bodily substances
 - iv.** that involves handling or contact with animals, animal hides, animal skins, animal wool or hair, animal carcasses, or animal waste products
 - v.** that involves handling or contact with fish or marine mammals.
- e.** any other injury or illness declared by regulations to be a notifiable injury or illness for the purposes of this section.

**Outdoor
education**

Outdoor education is one of seven key areas of learning in the health and physical education learning area of the national curriculum. It focuses on particular aspects of outdoor learning, such as place-based journeys, adventure activities, outdoor pursuits, and relevant aspects of education for sustainability.

Outdoor pursuits	Outdoor pursuits are activities that involve moving across natural land and/or water environments by non-mechanised means, for example, biking, orienteering, tramping, rock climbing, cross-country skiing, kayaking, sailing, rafting, and caving.
Parent/caregiver consent	Parent/caregiver consent is permission given for ākonga to attend an EOTC event or activity after parents/caregivers have been provided with sufficient information to understand the EOTC event or activity and the risks associated with it.
Person Conducting a Business or Undertaking	<p>The Health and Safety at Work Act 2015 defines a PCBU as:</p> <ul style="list-style-type: none"> a. a person conducting a business or undertaking: <ul style="list-style-type: none"> i. whether the person conducts a business or undertaking alone or with others and ii. whether or not the business or undertaking is conducted for profit or gain but b. does not include: <ul style="list-style-type: none"> i. a person to the extent that the person is employed or engaged solely as a worker in, or as an officer of, the business or undertaking ii. a volunteer association iii. an occupier of a home to the extent that the occupier employs or engages another person solely to do residential work iv. a statutory officer to the extent that the officer is a worker in, or an officer of, the business or undertaking v. a person, or class of persons, that is declared by regulations not to be a PCBU for the purposes of this Act or any provision of this Act.
Personal protective equipment	Under the Health and Safety at Work Act 2015, personal protective equipment means anything used or worn by a person (including clothing) to minimise risks to the person's health and safety and it includes air-supplied respiratory equipment.

Place of work	<p>A place (whether or not within or forming part of a building or structure) where any person is to work, is working, for the time being works, or customarily works, for gain or reward and, in relation to an employee, includes a place, or part of a place, under the control of the employer (not being domestic accommodation provided for the employee):</p> <ul style="list-style-type: none"> a. where the employee comes or may come to eat, rest, or get first aid or pay b. where the employee comes or may come as part of the employee's duties to report in or out, get instructions, or deliver goods or vehicles c. through which the employee may or must pass to reach a place of work.
Psychological first aid	<p>Providing psychological first aid means promoting an environment of safety, calm, connectedness, self-efficacy, empowerment, and hope for people after a traumatic incident.</p>
Risk Assessment and Supervision	<p>Risk Assessment and Supervision is a risk management planning tool used to effectively identify risks and apply appropriate controls.</p> <p>These have replaced Risk Analysis Management System or RAMS and Safety Action Plans which are out of date and no longer good practice.</p>
Reasonably practicable	<p>Under the Health and Safety at Work Act 2015, reasonably practicable, in simple terms, means taking all the steps that are reasonably possible in practice to achieve a result. The Health and Safety at Work Act 2015 states:</p> <p>Unless the context otherwise requires, reasonably practicable, in relation to a duty of a PCBU set out in subpart 2 of Part 2, means that which is, or was, at a particular time, reasonably able to be done in relation to ensuring health and safety, taking into account and weighing up all relevant matters, including:</p> <ul style="list-style-type: none"> a. the likelihood of the hazard or the risk concerned occurring b. the degree of harm that might result from the hazard or risk c. what the person concerned knows, or ought reasonably to know, about <ul style="list-style-type: none"> i. the hazard or risk ii. ways of eliminating or minimising the risk d. the availability and suitability of ways to eliminate or minimise the risk e. after assessing the extent of the risk and the available ways of eliminating or minimising the risk, the cost associated with available ways of eliminating or minimising the risk, including whether the cost is grossly disproportionate to the risk. <p>To avoid doubt, a person required by this Act to take reasonably practicable steps must do so only in regard to circumstances that the person knows or ought to know about.</p>

Risk

There are three possible levels of risk that Activity Leaders should be aware of:

Absolute risk – the uppermost limit of risk inherent in a situation that has no safety controls present, in other words, the worst that could happen.

Residual risk – the amount of risk present when the absolute risk has been adjusted by safety controls.

Perceived risk – an individual's subjective assessment of the residual risk present at any time. This usually differs from person to person, and perceptions can range from absolute risk at one end of a continuum to no risk at all at the other end.

**Standard
Operating
Procedures
(SOPs)**

SOPs are a risk management planning and management tool. They are created using a risk assessment and are particularly useful for events that happen multiple times led by different staff.

Serious harm

The Health and Safety at Work Act 2015 replaces the term 'serious harm' with the concept of 'notifiable injury or illness': <https://www.worksafe.govt.nz/notifications/what-events-need-to-be-notified/>.



Should

In this document, “should” is used in reference to a guideline that is strongly recommended and is to be followed if at all possible. This is based on good practice in the relevant activity. Activity Leaders should have clear justification for operating outside guidelines.

Traumatic incident

A traumatic incident is an event that:

- › causes sudden and/or significant disruption to the operation, or effective operation, of a school and their community
- › has the potential to affect a large number of ākonga and staff
- › creates significant dangers or risks to the physical and emotional wellbeing of children, young people and people within a community
- › attracts media attention or a public
- › profile for the school as a result of these incidents.

Examples of traumatic incidents include:

- › the sudden death or serious injury of a child, young person, staff member or whānau member
 - › witnessing serious injury or death of a child, young person, staff member or whānau member
 - › threats to the safety of ākonga or staff, including the presence of an individual behaving in a threatening manner
 - › physical or sexual abuse that impinges on the school
 - › theft or vandalism
 - › a lost or missing child, young person or staff member
 - › floods, fires, earthquakes and other community crises or natural disasters.
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