

**Pertinent Highlights from Michael Lindsey's 2016
Association for Experiential Education
ALDO LEOPOLD CHARTER SCHOOL
Program Review Report
May 5-7, 2016**

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Organization: Aldo Leopold Charter School (ALCS)

A note on this document: Mr. Lindsey's comments, which include recommendations, appear below. Interpolated notes from Risk Management Coordinator Jim McIntosh appear in italics following each recommendation. The goal here is to track progress as the school responds to each recommendation.

The interpolated notes were added in February and March of 2017.

General Observations:

ALCS The school has been in operation since 2005 and is a New Mexico Public Schools Charter School. It has approximately 23 staff and over 130 students. They serve students grades sixth through 12. A core part of their program is the experiential education component. This includes backpacking, skiing/snowboarding, mountain biking and various intermural sports. In addition, they have an extensive internship program. Internships include the Youth Conservation Corps, working with business owners in Silver City and local non-profits. The staff is very committed to provide the students a holistic environment and offer academic and personal growth opportunities to prepare them to be successful. The reviewer found the staff to be transparent and welcoming in their discussions about risk management, and how it may be augmented using the external review as a tool.

*Note: Mr. Lindsey's **Recommendations** are directed toward "How the practice may be improved and be in more in alignment with AEE standards and/or industry practices."*

Backpacking

While there are a number of [backpacking] resources that cover practices, there is not a comprehensive policy and procedure manual that staff can readily refer to in the field.
Recommendation:

1. Develop a field manual that describes ALCS policies and procedures for field activities (e.g., lightning management, stove use, etc.)

Note: The ALCS Experiential Education Handbook is a work-in-progress. The largest section of that handbook, comprising at least 100 pages, is titled "Managing Risk in the Outdoor Classroom" and will be distributed to ALCS staff in August of 2017. Our manual is currently being reviewed by Fort Lewis College graduate students in Dr. Bob Stremba's Organization and Administration of Outdoor Education course.

Biking

Suggestion:

Traditionally biking programs have one of the highest incident rates. They could benefit from an internal review of this program. There are many excellent mountain bikers on staff that could benefit from visiting another program that offers biking, to import best practices into ALCS program.

Note: Fort Lewis College has an extensive and highly regarded bicycling program. Graduate students are reviewing our policies and will be sharing Fort Lewis best practices with us during their ALCS site visit in March 2017. For the past 3 years we have administered a bicycle competency test during the first week of school and provide instruction for students who are not yet proficient cyclists but who seek to be. For students whom we do not yet consider safe, competent cyclists, we provide transportation to sites.

Skiing/Snowboarding

Comment: ALCS skiing program is conducted at a ski resort. It is well managed and popular with students. Some parents questioned the amount of direct supervision by staff. They felt staff should be checking in with “buddy groups” more often.

Suggestion:

Consider giving the students a communication device. If cell phone coverage is available, it could be utilized. If not, they may use “walkie talkies,” this could offer an augmented check in time and/or have staff on site more quickly in the event of an incident.

Note: ALCS did not sponsor a ski trip this year. We are reviewing our skiing and policy and will likely reconfigure our future ski trips, with regard to both risk management and academic purpose.

Swimming & Wading

Comment: ALCS students wade and swim in rivers, lakes, and ocean. While some policies appear to be in place, the reviewer believes there is some ambiguity in how the various venues are managed, such as when swimming tests are required, placement of staff, as well as, depth, current, and tide effects.

Recommendation:

Review current practices and design clear policies for the various venues (river, lake, ocean). Clearly, designate the differences between wading, swimming, and associated staff ratios and placement.

Note: We have written a new water-crossing policy for backpacking and hiking and have established protocols for ocean swimming during our Marine Ecology field trip in San Diego. As with other outdoor-educational policies, Fort Lewis College students are reviewing our water-sport policies.

Medical History Is Known and Managed for Students and Staff

Recommendation: require staff to submit medical conditions that have potential for complications in managing a medical condition in the field (e.g. epilepsy, coronary disease etc.). This would not include medical conditions, such as psychotropic medication for depression or other sensitive medical information that staff may want to keep confidential and would not necessarily be of concern in a back country setting.

Note: For the first time, we collected medical data for all staff, both full-time and part-time, at the beginning of the school year. The ALCS school nurse, Jim McIntosh, RN, maintains a confidential file of staff health forms and coordinates pertinent, HIPAA-compliant distribution of health information.

Staff-to-Participant Ratios

Suggestion: there are a number of resources (AEE, National Outdoor Leadership School, Outward Bound) that outline staff-to-participant ratios that are common for some of their activities in the Outdoor Education Industry. It may be useful to compare these with the practices ALCS.

These ratios are commonly used for trained staff and (physically capable participants with little or no prior experience),

Activities ALCS offers.

- Backpacking (overnight or longer): 1 instructor to 6 to 8 participants
- Flat-water paddling: 1 instructor to 6 participants in Class I or II water
- Sea kayaking: dependent on a variety of factors
- Rafting: 1 instructor per 1 or 2 boats in Class III (or lesser) water

Note: For backpacking trips we have always maintained staff:student ratios consistent with industry standards. We have defined similar staff-student ratios for other class excursions, including bicycling trips that are part of our physical-education program.

Wilderness First Aid Requirements

Recommendation: When conducting overnight camping activities that are two hours or more from definitive medical care, have a staff with current WFR certification with each group.

Note: At present we have four Wilderness First Responders on staff, with plans to continue increasing the number of trained WFRs. Our goal is to have all primary backpack trip leaders WFR certified. The school has continued to support staff funding for WFR certification and recertification.

Medication Management

Comment: Staff carry all student medications, except birth control and asthma inhalers (staff carry backup inhalers). They keep a log when medications are administered. A staff that is a nurse and a backpacking instructor explains contraindications and side effects to staff.

Recommendation: When conducting activities in a backcountry environment, that is over 30 minutes from definitive medical care, carry an epinephrine delivery system, and train staff in its use.

Note: An epinephrine delivery system accompanies all groups entering a backcountry environment. Staff are periodically trained in administering epinephrine.

Incident Data Management and Communication

Comment: Last year, incident reports were placed in the students file and not tracked as an aggregate. ALCS reports that the numbers of incidents are minimal and “data tracking” may not deliver useful information due to the low numbers. Incidents are discussed during the Risk Management Committee.

Suggestion: While tracking data (number of incidents per student day) may not yield notable trends, their tracking raw numbers will be useful. For example, the number of bike incidents, potential root causes and staff involved. ALCS plans on producing their annual safety report at the end of the school year. A suggestion is this annual report should be based on their fiscal year and to include:

- Tracking number and severity of incidents
- Identifying negative trends and analysis of root cause and potential methodology to reduce their likelihood of occurring.
- Identifying positive trends and analysis of root cause and potential methodology to increase their likelihood of occurring to develop best practices
- Identifying areas of concern that could benefit from increased scrutiny and consider having an external “subject matter expert” conduct a review

Note: The Risk Management Coordinator compiles relevant injury and illness incident reports and records medication administration data. In consultation with the School Director, he reviews significant data and shares any data that might require a change in policy or protocols with the Risk Management Committee.

Risk Release Documents & Parental Consent

Comment: Most students’ parent/guardian, sign a risk release during enrollment. For activities that occur more than one hour from school, parents provide a parent permission form.

Recommendation: Standardize the practice to ensure all students engaged in an activity one hour from the school obtain a parent permission form.

Note: We now require a permission slip for all students engaged in activities more than an hour away from school. In addition, staff carry parental contact information in their first-aid kits.

Staff Are Informed In a Timely Manner of Changes in Policy and Incidents

Comment: Policies and incidents are communicated during staff meetings. Some staff mentioned frustration of not being informed of incidents until hearing it from community members. This may be anecdotal and not common in overall organizational communication.

Recommendation: When a significant incident that requires evacuation, or a near miss occurs with potential for severe consequences, it should be communicated via a medium that is timely. For instance, when the student was evacuated for heat-related illness, it is necessary that other staff that are going out into similar conditions are aware of the incident, relating causal factors and ways to avoid a similar incident.

Note: The Risk Management Committee reviews all such incidents and recommends policy changes when necessary. An essential part of our review is a “bi-level” incident reporting system that differentiates between minor and major illness and injury incidents. All incidents are recorded, of course, but the response from the Risk Management Coordinator to more significant incidents is immediate.

Administration Risk Management Systems

Recommendation: ALCS is projected to grow over the next two years, according to the Director. The experiential education program is a complex program that includes outdoor

pursuits and multiple internship programs (including Youth Conservation Corps that has tangible risks with tool use for example). Designating a staff to oversee risk management is a practical approach. However, to have the resources and time to concentrate on augmenting current risk management practices, this position would be best served by having limited additional duties such as teaching classes. Some duties could be:

- Managing all incident reporting, including constructing an annual report trend analysis, and assuring strategies are in effect to mitigate negative trends
- Overseeing Activity Approval system, with final approval by school director
- Overseeing staff training for experiential education activities
- Promotion and evaluation of field staff
- Report to the School Director and sit on the Risk Management Committee
- Develop and manage all policies and procedures for Experiential Education activities

Note: The current Risk Management Coordinator, Jim McIntosh, RN, manages incident reporting, analyzes illness and injury reports, and makes recommendation to the Risk Management Committee if school policy and procedure merit a change. Currently, the School Director oversees the Activity Approval System and makes the final decision about whether to approve Activity Requests. The Risk Management Coordinator also oversees staff training for experiential education activities, though he hopes to expand this training in the coming years. He is assisted in his training duties by staff members Pete Ranking, Maddy Alfero, and Catalina Claussen, who are all WFR-certified. This year, the RMC is undertaking a thorough review of risk-management policy and procedures related to experiential education. While attending the October 2016 Association for Experiential Education National Conference in Minneapolis, he investigated the possibility of ALCS embarking on a program review that would culminate in AEE accreditation. The site visit from Dr. Stremba's graduate students will assess the feasibility of ALCS pursuing accreditation.

Program/Activity Approval System

Recommendation: It appears that some activity proposals come in too close to the beginning of the start date. There are guidelines when proposals should be submitted. However, there may be pressure to accept a proposal due to the investment in the plan and it is a short, low risk activity. ALCS could either modify the process for shorter activities or reject proposals that do not have time to be adequately vetted. Also, review student supervision of "last minute" non-participation students who do not attend the activity and remain at school without classes or other planned activities.

Note: While we have seen improvement in the timeliness of Activity Requests, more progress must be made. ALCS is a busy institution, with staff eager to provide students with new opportunities. The School Director has the ultimate say in activity approval and has requested that staff to allow him adequate time to review and vet activities.

Training for Experiential Education Activities

Comment: Staff are required to attend an annual training referred to as "boot camp" each fall before the beginning of the backpacking trips. This includes multiple days of instruction in backpacking skills, first aid, field evacuations, incident reporting and a fitness test. It concludes with a written test that must be passed before instructing in the field.

Suggestion: There are a variety of organizations that conduct instructor training/certification for outdoor education activities. ALCS may benefit from having an instructor from one of these organizations monitor a part of the training and offer suggestions and observations for implementing additional training modalities. Often, organizations may not be aware of changes or improvements in outdoor education pursuits. An alternative would be to have an ALCS staff attend an instructor-training course with NOLS or OB, to glean current practices.

Note: While we agree that this recommendation is important, staff have not found time to act on this recommendation yet during the first post-report year. This goal remains a long-time goal.

Staff Evaluation for Experiential Education Activities

Recommendation: In the event of a significant incident, it is common to review the staff's field performance and criteria for advancement. It is recommended the decision to move from SGL to PGL is quantified and documented in their employee file. In addition, all staff should be evaluated after each extended program in key areas of risk management in the field by fellow staff. This information should also be part of their file. The evaluation, at a minimum, includes:

- Hazard analysis and management
- Technical skill competency (e.g. navigation, group management, camp craft etc.) and the staff's ability to teach that skill.
- Team work and risk management with colleagues
- Any incident management
- How they manage group problem solving, hazard analysis, and student inclusion in risk management

Note: We hope to implement a more formal policy for advancing staff from SGL to PGL during the Fall 2017 backpacking trips. In the past, we have relied upon the recommendation of experienced staff for such advancement, but we have not documented those advancements. We have clear criteria for primary leadership "minimal requirements," but we have not subjected staff to a more qualitative assessment of their trip leadership.

Summary

Aldo Leopold Charter School has conducted a rigorous examination of their experiential education program over the past two years, following their tragic accident. They are a dedicated staff that worked diligently to address all facets of their risk management system. ALCS generally is in line with most industry standards. A few areas of policy development in water activities, backpacking trips and staff tracking would be beneficial and bring them in closer compliance with AEE standards. The reviewer found all staff to be transparent, welcoming and eager to continue improving the delivery of their program. The practices instituted to address the activity approval process; the implementation of a Risk Management Committee and staff training is sound.

It was a pleasure to spend time with staff that are extremely dedicated to their mission of improving the lives of their students in a holistic approach of solid academics combined with the experiential programs to achieve the mission.