



BSI Standards Publication

Adventure tourism — Leaders — Personnel competence

National foreword

This Published Document is the UK implementation of ISO/TR 21102:2013.

The UK committee is of the opinion that PD ISO/TR 21102 may have limited application in the UK, given the coverage of the UK's national governing body. However, SVS/2/5 has expressed that the Technical Report may improve conditions in countries without formally recognized training schemes. It could therefore prove a useful procurement tool for UK providers purchasing the services of leaders in such countries. The Technical Report is intended to enhance the provision across the adventure tourism sector of competent activity instructors.

The UK participation in its preparation was entrusted by Technical Committee SVS/2, Tourism services, to Subcommittee SVS/2/5, Adventurous activities, expeditions, visits and fieldworks.

A list of organizations represented on this subcommittee can be obtained on request to its secretary.

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Published by BSI Standards Limited 2014

ISBN 978 0 580 76690 9

ICS 03.080.30; 03.200

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This Published Document was published under the authority of the Standards Policy and Strategy Committee on 31 May 2014.

Amendments/corrigenda issued since publication

Date	Text affected
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TECHNICAL REPORT

ISO/TR
21102

First edition
2013-09-01

Adventure tourism — Leaders — Personnel competence

Tourisme d'aventure — Leaders — Compétence du personnel



Reference number
ISO/TR 21102:2013(E)

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Published in Switzerland

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the WTO principles in the Technical Barriers to Trade (TBT) see the following URL: Foreword - Supplementary information

The committee responsible for this document is ISO/TC 228, *Tourism and related services*.

Introduction

Adventure tourism

Adventure tourism is a global industry that is growing in importance. Whether provided on a commercial, not for profit or charitable basis, adventure tourism activities involve an accepted, inherent element of risk and challenge. Taking risks brings rewards but also brings dangers. In order to maximize the rewards, adventure tourism activity providers should operate as safely as practicable.

ISO 21101, ISO/TR 21102 and ISO 21103 provide a basis for adventure tourism activity providers to plan, communicate about, and deliver adventure tourism activities as safely as practicable.

Effective implementation of these International Standards will help consumers make informed choices about activities and providers.

Adventure tourism standards

The purpose of these International Standards is to set out the minimum requirements for safety management systems and communication to participants.

The following two International Standards are independent entities since they apply to different aspects of adventure tourism:

- ISO 21101: specifies how the adventure tourism organization manages its operations in terms of safety.
- ISO 21103: specifies the minimum information that shall be communicated to participants and potential participants before, during and after the activity to ensure safety.

ISO/TR 21102: provides data on the minimum competence of adventure tourism activity leaders.

Purpose of this Technical Report

Adventure tourism activity leaders' competences for conducting participants and assuming responsibility for them is a critical factor in ensuring delivery of safe adventure tourism activities.

Competence is a concept that involves not only skills but also a knowledge of attitudes or attributes.

Depending on the type of adventure tourism activity (rafting, hiking, cascading, climbing, among others), different competences are required. Nevertheless, there are some competences that are common to every adventure tourism activity. These common competences (and the respective expected results) are the focus of this Technical Report.

It is expected that competent leaders for specific adventure tourism activities will use this Technical Report as a reference.

Adventure tourism — Leaders — Personnel competence

1 Scope

This Technical Report indicates what the market normally considers as desirable competencies and the related expected results of competencies for adventure tourism activity leaders common to any adventure tourism activity.

This Technical Report does not apply to adventure tourism activity leaders involved in underwater activities for which there are other specific International Standards.

2 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

2.1

competence

ability to apply knowledge and skills to achieve *expected results* (2.2)

2.2

expected results

results of performed activities in provision of service

Note 1 to entry: Expected results can refer to an occupation, a *competence* (2.1) or a set of competencies.

2.3

adventure tourism activity

adventure activity for tourism purposes that involves a degree of instruction or leadership and a deliberate accepted element of risk

Note 1 to entry: An accepted element of risk means that the participant has a minimum understanding about the risk involved.

2.4

competent person

someone who has the *competence* (2.1) to perform specific functions

2.5

leader

competent person (2.4) who takes responsibility for people, and is able to lead and supervise an assigned activity

2.6

participant

person taking part in the *adventure tourism activity* (2.3) but not a member of the leadership team

Note 1 to entry: A participant might also be referred to as 'client', 'customer' or similar

Note 2 to entry: A leadership team comprises several *leaders* (2.5)

2.7

contingency measures

preventive or corrective action to be adopted in response to an event and a need to depart from the agreed plan of action

2.8

emergency

serious situation requiring immediate action

2.9

first aid

emergency (2.8) procedures aimed at maintaining vital functions whilst ensuring that the condition of a person who is wounded, unconscious or whose life is in danger is not aggravated, until he or she receives more qualified assistance

3 Role of the leader

The role of the leader, regardless of the adventure tourism activity being undertaken, usually includes:

- a) participant assistance;
- b) safety management and care of participants and the leadership team in accordance with the operator's safety management system, including provision of appropriate information, instruction, supervision and training;
- c) application of emergency procedures;
- d) information sharing.

4 Expected results

4.1 Conformance

Complying with legislation and other normative requirements – including, but not limited to – assuming pertinent responsibilities and meeting the legislation requirements of the region(s) in which the adventure tourism activity leader acts.

4.2 Leading groups

Usually the role of the leader includes:

- a) Using technical skills before or during the adventure tourism activity to decide about changes in the programming, including, but not limited to:
 - 1) undertaking analysis of the situation and cancelling or changing the activity due to hazards, risks and unforeseen situations;
 - 2) adopting contingency measures;
 - 3) making use of natural phenomena that are helpful for weather forecasting;
 - 4) deciding about alternative routes or activities in response to changes in the weather, local operating condition or participants'; capabilities and expectations.
- b) paying specific care and attention to safely leading groups during planned and unplanned routes including, but not limited to:
 - 1) presenting activity programmes and giving formal safety briefings;
 - 2) organizing, controlling and facilitating the integration among group participants;
 - 3) adapting programmes so that they meet the needs of different groups;
 - 4) establishing limits related to group and participant behaviours;

- 5) mediating conflicts;
- 6) dealing with adverse or unusual situations and identifying potential high risk hazards through continuous assessment;
- 7) critical clothing or equipment required as a necessity;
- 8) assessing participant competency levels and stress levels.

4.3 Technical abilities

The technical abilities of the leader should include, but not limited to:

- a) applying technical skills such as orientation and navigation;
- b) checking that the use of equipment is in accordance with current good practice or manufacturer's instructions, including, but not limited to:
 - 1) keeping equipment organized and in a serviceable state;
 - 2) watching for signs of wear or defect;
 - 3) advising participants on the appropriateness and correct use of their personal clothing and equipment for the activity and monitoring participants during the activity to ensure the equipment is used correctly;
 - 4) knowledge of equipment and ability to do basic repairs.
- c) instructing the participant in the minimum practical techniques needed for performing the activity – including, but not limited to:
 - 1) utilizing instruction techniques related to the activities to be practiced;
 - 2) developing individual competence;
 - 3) creating an environment of stimulation for learning;
 - 4) using language understood by participants and checking for understanding;
 - 5) communicating correct and sufficient information;
 - 6) demonstrating emergency procedures;
 - 7) informing in minimum social and environmental impact procedures that apply;
 - 8) demonstrating equipment usage.

4.4 Managing risks

The leader's role in managing risk usually includes:

- a) ensuring the well-being and safety of the participant through continuous monitoring and assessment and where necessary taking appropriate action during the activity – including, but not limited to being capable of:
 - 1) managing hazards and risks likely to impact upon the physical and emotional safety of participants;
 - 2) assessing factors that can contribute for accidents;
 - 3) encourage positive relationships and teamwork among group members;
 - 4) encouraging and valuing respect for physical and emotional safety of participants;

- 5) watching for signs of physical and mental fatigue and emotional distress;
- 6) recommending adequate food and clothing for the activity and ensuring sufficient supply in emergencies;
- 7) ensuring that participants are informed and understand emergency measures;
- 8) communicate appropriate and inappropriate behaviours;
- 9) intervening when inappropriate behaviour occurs;
- 10) not exposing themselves or other leaders to unnecessary risk themselves;
- 11) ensuring the activity follows the organization's operating procedures.

4.5 Responding to incidents and emergencies

The leader's role in responding to incidents and emergencies usually includes:

- a) managing emergency situations – including, but not limited to:
 - 1) assessing emergency situations and organizing evacuation or rescue, if necessary;
 - 2) controlling groups;
 - 3) arranging the calling of and on-going liaison with emergency services, resources or other support;
 - 4) ensuring the well-being of participants in adverse situations in order to prevent or minimize harm;
 - 5) referring to emergency checklists.
- b) applying first aid – including, but not limited to:
 - 1) applying first aid within the scope of their experience and training;
 - 2) applying first aid adequately to each situation, according to the law.

4.6 Behaving professionally and ethically

- a) preventing or minimizing environment and social impacts deriving from adventure tourism activities – including, but not limited to:
 - 1) applying minimum negative impact practices;
 - 2) sensitizing and orienting the group about the importance of environment conservation and respect for the local communities;
 - 3) intervening in group actions when these are deemed harmful to the environment or to local communities;
 - 4) promoting conservation practices during the adventure tourism activity;
 - 5) respecting and complying with visitation rules in the geographic area of work or activity;
 - 6) working to ensure participants' satisfaction – including, but not limited to, informing participants of the activity's generic characteristics before its commencement;
 - 7) keeping the participant motivated and interested in the programme;
 - 8) keeping the participant informed of specific aspects during the development of the activity;
 - 9) being aware of individual needs and providing respective support;
 - 10) receiving complaints and suggestions and responding appropriately;

- 11) solving problems and establishing consensus among divergent interests.
- b) looking after own personal presentation and professional bearing – including, but not limited to:
 - 1) taking care of hygiene, looks, physical bearing and readiness;
 - 2) setting limits in order to develop an effective, professional relationship with the participants during the activity and avoid any inappropriate behaviour;
 - 3) dealing with embarrassing situations;
 - 4) using appropriate language and treatment;
 - 5) maintaining high ethical and professional standards.

5 Desirable competences

5.1 General

The desirable competences necessary for achieving expected results shall be evaluated through knowledge, skills and attitudes indicated in [5.2](#) through [5.4](#).

NOTE Specific qualifications can be required for some adventure tourism activities as outlined by regulation or good practice.

5.2 Knowledge

Adventure tourism activity leaders should have the following knowledge:

- a) interpretation of weather signs, atmospheric or environmental conditions;
- b) techniques of navigation and orientation where appropriate (such as basic interpretation of topographic maps, maps – caption and symbolism, scale, level curve, use of compass and orientation through natural signs);
- c) techniques of group management, integration and conflict-solving strategy;
- d) strategies of communication and instruction;
- e) basic requirements of safety in adventure tourism activity;
- f) factors that contribute to the occurrence of accidents;
- g) common environmental hazards and risks;
- h) adequate generic emergency situations and procedures;
- i) first-aid procedures;
- j) local environment legislation and conservation;
- k) information of environment and local communities specific to the location of the adventure tourism activity;
- l) techniques to minimize negative impact on the environment;
- m) basic rules of education and social skills, and personal hygiene care;
- n) legal and statutory requirements.

5.3 Skills

Adventure tourism activity leaders should have the following skills:

- a) be expressive in oral communication such as keeping participants interested and motivated in the activity;
- b) be able to express and comprehend the participants' language or a language mutually agreed with the participants);
- c) instruct clearly and articulately to ensure good understanding of the techniques required;
- d) have physical and mental ability and fitness to complete the planned activities;
- e) apply suitable leadership to lead others safely in the particular adventure tourism activity;
- f) have the verbal logical reasoning necessary e.g. to verbally describe a procedure in a chain of sequential steps;
- g) decision making capacity for example in the event of an emergency;
- h) planning capacity e.g. to establish a logical sequence of steps for achieving a specific end;
- i) basic life support techniques (including cardiopulmonary resuscitation and injury treatment techniques);
- j) ability to use emergency equipment, including communication tools.

5.4 Attitudes or attributes

Adventure tourism activity leaders should have the following attitudes or attributes, but not limited to:

- a) be persuasive, i.e. to convince people when necessary;
- b) be able to take and maintain control, when directing, organizing and supervising people;
- c) be able to instill confidence in people, i.e. to easily establish relationships, know how to act and what to say to make people feel comfortable, demonstrating encouraging and supportive behaviour;
- d) be able to listen, i.e. in order to make decisions, encourage people to express their opinions and to consult, listen and take into account their opinions;
- e) be empathetic and tolerant, i.e. to know how to deal with differences of opinion in order to show commitment;
- f) be a planner (in short term), i.e. to programme in advance, to value setting objectives, to project tendencies and to develop projects;
- g) be optimistic, i.e. to have a positive outlook in the face of unforeseen events;
- h) be flexible, i.e. to adjust readily to different situations;
- i) be perceptive, i.e. aware and capable of understanding situations and able to analyse behaviours e.g. body language.

6 Maintenance and improvement of competence

6.1 Ongoing professional development

Adventure tourism activity leaders should undertake ongoing professional development.

Ongoing professional development concerns the maintenance and improvement of competences. This can be achieved by means such as additional professional experience, private study, oriented training, participation in reunions, lectures, seminars, refresher courses, conferences or other relevant activities.

The ongoing professional development activities should take into account changes in:

- a) needs of individuals;
- b) needs of organizations;
- c) adventure tourism activities techniques, technologies, equipment and practices;
- d) participant relationship practice;
- e) rules and legislation.

6.2 Maintenance of competence

Leaders should maintain and demonstrate their minimum competences through regular participation in adventure tourism activities (by written records, for example) and keep their licenses or titles up to date.

Bibliography

- [1] ISO 21101, *Adventure tourism — Safety management systems — Requirements*
- [2] ISO 21103, *Adventure tourism — Information for participants*

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