

# Site-Specific Climbing Wall Training Scheme Guidance







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# Introduction

There is no legal requirement for any qualifications to be held by a supervisor, coach or instructor who is leading walking, climbing or mountaineering activities in the UK and Ireland. However, there is a legal responsibility that such people have an enhanced duty of care and should ensure that they are competent to manage the activities they undertake.

Should an incident occur, there may be an investigation to determine that the activity leader was competent, with them or their employing organisation having taken reasonable steps to ensure competence.

**The Health and Safety Executive has identified four ways for leaders to demonstrate competence:**

1. to hold the relevant national qualification
2. to hold an equivalent qualification;
3. to have received appropriate in-house training and endorsement;
4. to be competent through experience, (though this is harder to prove without endorsement from a competent person).

Mountain Training endorses this view, recognising that national qualifications are the key components in such an approach. National qualifications provide certified accreditation to a nationally recognised minimum standard. Making judgement about levels of experience and delivering in-house training is best left to appropriately qualified and experienced individuals.

Mountain Training recognises that within climbing walls especially, in-house site-specific training and endorsement can be a more tailored and accessible route to competence than undertaking a national qualification, such as the Climbing Wall Instructor or Bouldering Wall Instructor.

A site-specific scheme may also address certain skills at a different level to a nationally recognised qualification and/or to add content that a nationally recognised qualification may not include, such as high ropes, performing rescues, or floorwalking. A site-specific scheme may be established by a facility or an employing organisation (commercial, public or voluntary sector) and should be delivered by appropriately qualified and experienced individuals.

With this in mind, Mountain Training has prepared these notes to give guidance for establishing site-specific endorsement schemes for climbing wall supervisors, instructors and coaches. The term 'supervisor' is used in the following guidance to denote any of these roles. The guidance is designed for both those seeking information on establishing such a scheme and for those delivering them. A site-specific scheme should assure those involved that a reasonable level of care has been exercised in ensuring the competence of those working with climbing groups.





## General principles

They key component of any site-specific endorsement scheme is the technical advisor\* and their relationship with the management of the facility. The quality assurance of the supervisors produced rests with them. Therefore, the technical advisor should be able to benchmark their own competency in this role, in order to demonstrate that the scheme is robust and fit for purpose. The technical advisor should be able to evidence five key areas:

- Technical competence in the activity/ies usually evidenced by a qualification.
- Industry experience – broad, varied and deep in order to have developed perspective and judgement. This should be described in a CV.
- Training and assessing skills – as evidenced by qualifications and/or quality assure experience.
- Knowledge and experience of management systems – to maintain safety and safe practice. As evidenced by having had responsibility for such roles.
- Knowledge of the legal and guidance framework for the sector. Attendance at recognised courses will be helpful.

All site-specific schemes should have a documented process that are benchmarked against accepted standards that are common within the sector. These may reference national qualifications, accrediting bodies or national norms. This will provide some independent verification of standards for the scheme to stand up to scrutiny. As a general rule the scheme should have the following documented elements:

1. A risk assessment and operational procedures for the activities to be undertaken. These will take into account the nature of the site and the level of competency of the supervisors and management system being contemplated.

\*Also known as the competent person to advise on safety, technical expert, subject matter expert etc... See Appendix 1 for guidance on choosing a technical advisor

2. From these two key documents the experience and skill requirements of the candidates should be determined, documented and communicated.
3. A syllabus of competencies to be acquired by the candidates.
4. A training course programme that details timings, ratios, content and trainer standards.
5. Practical experience requirements for candidates, in order to develop the group management and judgement skills required of the role. The methodology required to facilitate This safely should be laid down.
6. The assessment process, describing and recording how evidence of competency is demonstrated. Deferral systems and methods of upskilling and re-assessing.
7. An ongoing monitoring process. How management and the technical advisor monitor quality assurance and safety standards.
8. Endorsement time limits and any revalidation processes.

All the above may require a written prospectus for candidates and managers to understand and refer to the process.

Any site-specific training and assessment scheme should be developed for candidates who are, as a minimum, experienced and competent wall users in their own right. They should have mastered the basic skills of safe climbing and risk awareness in a climbing wall environment. The development of personal competence and safety should be of primary concern to the managers of such a scheme. It is desirable that any prospective supervisor has had considerable experience of climbing at the specific site for which the scheme has been designed, or, in the case of a brand new wall, a similar facility.

The role of the site-specific instructor is to facilitate the safe and enjoyable use of specified climbing walls at a defined level. The site-specific endorsement scheme should also provide information for those leaders to progress to the Climbing Wall Instructor or Bouldering Wall Instructor qualifications if desired.

It is an important part of any such supervisor's role that they should be able to guide and counsel novices in ways in which they could develop their own climbing career. The mountaineering councils provide a wealth of free publications and advice on their websites to support new climbers, which supervisors can use to enhance their delivery.

[\\*See Appendix 1 for guidance on choosing a technical advisor.](#)

# Essential considerations

## 1. Site-specific

These guidance notes relate to the development of site-specific endorsement schemes. Such schemes should always be trained and assessed at the venues to which they relate. It is not envisaged that there is automatic transferability of a site-specific validation to another site unless there are very similar risk assessments, operational procedures and equipment – and this has been specifically designed into the scheme.

## 2. Ownership

The assumption behind these notes is that any site-specific endorsement scheme will be devised for use by and for a specific organisation in a specific location. They are designed to be used in the development of schemes that relate to supervisors working in the context of an organisation with a defined management structure. This can include staff of a climbing wall; school teachers at a school wall, youth workers employed by a local authority or volunteer leaders working for a voluntary organisation.

These notes are not intended to be used to create ‘stand-alone’ qualifications for individuals delivered on a commercial basis nor are they intended to infer skills and capabilities that may be transferred between organisations and their management structures. If this is desired, the Climbing Wall Instructor (CWI) is the national qualification and therefore more appropriate.





### 3. Scheme design

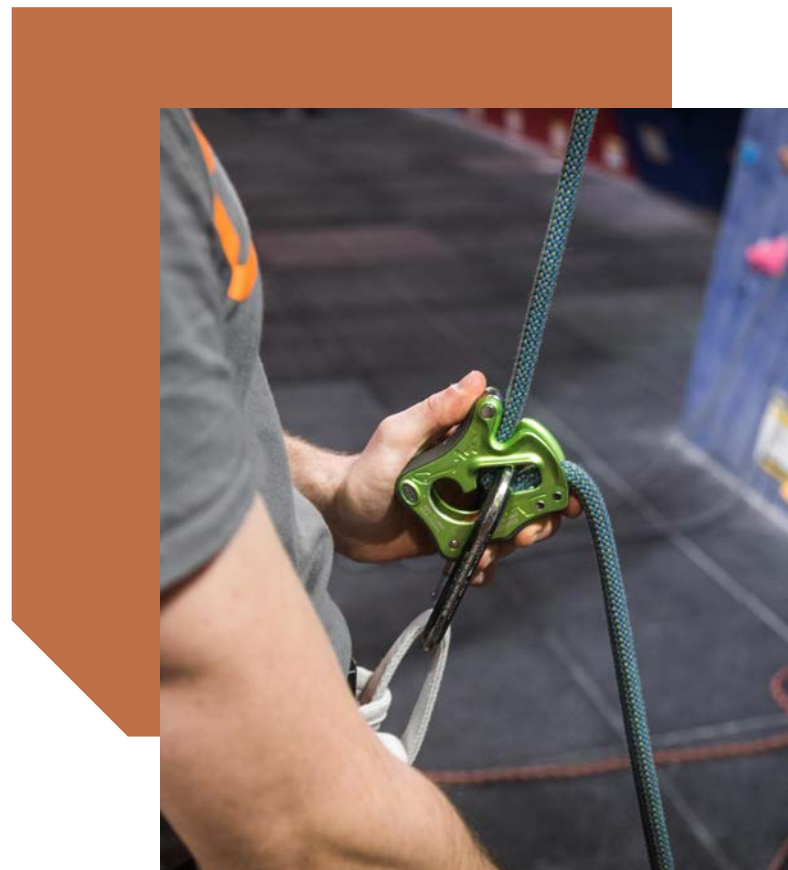
The following points should be considered by the deploying organisation and the technical advisor when they are contemplating the creation of any site-specific scheme:

- A.** What is the aim of the scheme? Who is it for and what need is being met that could not be met by recruiting suitably qualified supervisory staff?
- B.** Which wall(s)/structures and which groups of staff is it aimed at? What is the likely staff turnover? Who is the operating authority and the person responsible (wall manager)? Who will the client base be?
- C.** What links does the organisation have with the sport of climbing, if any? What is the depth of understanding and motivation of the organisation?
- D.** A comprehensive risk assessment should be conducted for the site and the potential staff-group by the designated technical advisor even where a pre-existing risk assessment may be held.
- E.** This risk assessment should be used to inform a person specification required to meet the skills, knowledge, attitude, training and experience required by the site and the type of activity to be undertaken; these may be classed as the 'training objectives' of the scheme and will determine the assessment criteria applied. Operational procedures derived from the risk assessment will depend greatly on the proposed use of the facility, e.g. public/private, novice/club, age of participants, top rope/leading.

**F.** The level and nature of recent experience required of candidates who are entering the scheme should be determined. This will require a judgement of the levels of understanding and experience required to assimilate and appreciate the skills listed in 'e' above.

**G.** Compare the skills and experience that are considered to be the minimum requirements with those of the nationally recognised qualifications administered by Mountain Training.

**H.** If that comparison indicates that a distinctly different level of skill, knowledge and experience may be required than that of Mountain Training's schemes, a site-specific training and endorsement system may be appropriate. If it does not then the use of a nationally recognised qualification should be considered. Mountain Training can advise on the entry and registration of candidates and supply details of providers of this award scheme.



**I.** Should a site-specific scheme be deemed appropriate, then materials (syllabus, candidate guidance notes, a logbook, application forms and record keeping schemes) should be devised as well as a suitable structure for the scheme. Consideration should always be given to the length and nature of the training, consolidation period, length and nature of the assessment and any requirements together with a time frame for ongoing revalidation.

**J.** The stages of all Mountain Training qualifications provide a proven structure that ensures that the requisite experience and skill development is attained to meet the standards of safety and judgement required for managing the dynamic risk activity of climbing. In particular, it is recommended that candidates gain experience of managing groups under careful supervision to develop their management skills before attending assessment.

- Record prior experience
- Training
- Consolidation – candidates gain experience under supervision by experienced qualified instructors.
- Assessment – by the technical advisor
- Ongoing experience and monitoring, including revalidation.

**Accredited prior learning (APL):**

Certain candidates may have significant previous experience of climbing and instructing. In this case they may be able to present evidence that the technical advisor can evaluate in order to fast track them to assessment. All candidates, regardless of their experience, should attend an assessment unless they can demonstrate competence by one of the four routes described in the introduction.





## 4. Syllabus content

Any syllabus devised for a site-specific endorsement scheme must be based upon the needs and thorough risk assessment for each site used. These guidance notes include suggestions for a possible 'core content' of the knowledge and skills which may be common to all such schemes. It should be noted, however, that the level of skills included in this core content will almost certainly differ from scheme to scheme as each may have unique considerations in terms of the site to be used, the intended client group and the nature and level of activities.

It should be emphasised that the desired competencies for an effective instructor require more than technical skills alone. These are summarized as SKATE:

- **Skills** – technical, communication, interpersonal, organisational
- **Knowledge** – of the venue, climbing systems, safeguarding, risk assessment, operational procedures
- **Attitude** – professionalism, commitment, duty of care
- **Training** – formative and ongoing, specific inductions, CPD
- **Experience** – personal climbing/bouldering, group management

In addition to these suggested core components there must be consideration of such site-specific factors as local regulations applied to the venue, employer codes of practice, health and safety issues, safeguarding practice, Disclosure and Barring Service checks (DBS), insurance, equipment, location of fire escapes and first aid. Where necessary these should be incorporated into the scheme.

## 5. Staffing the scheme

Any site-specific endorsement scheme designed in accordance with this guidance should be run by a suitably qualified and experienced technical advisor for the activities to be trained and assessed. The appropriate qualifications for this level of work could be:

- Climbing Wall Development Instructor (CWDI)
- Rock Climbing Development Instructor (RCDI)
- Mountaineering and Climbing Instructor (MCI)
- British Mountain Guide

These qualifications should be considered along with appropriate skills, knowledge, attitude, training and experience (SKATE) for the specific role. This should ideally include training in the role and responsibilities of the technical advisor.

For more details see:

<https://www.mountain-training.org/about/who-can-lead-instruct-or-coach>

The individual concerned should be either directly employed by the operating organisation or employed as a consultant on a contractual basis. It is highly desirable that the technical advisor is a current Climbing Wall Instructor and/or Rock Climbing Instructor course provider or has considerable experience of working on such courses. Previous experience of running or working on a site-specific endorsement scheme is also highly desirable.

The individual concerned should be responsible for the design, development and syllabus of the scheme as well as directly overseeing its delivery. They should personally carry out all technical assessments of candidates. They should personally complete a Statement of Competence naming the candidate or issue all pass certificates for candidates who have successfully passed the assessment element of the scheme. These should be signed by the technical advisor and should, ideally, include a syllabus summary and some form of identification to prevent misuse of such documentation. The supervisor's performance should be monitored by the technical advisor and a time limit to their endorsement be stipulated (e.g. one year).

Whilst it may be suitable for less experienced staff (site staff for example) to deliver some of the training, with appropriate guidance and training, careful consideration needs to be given to who performs the assessment. It is strongly recommended that the technical advisor overseeing the scheme (or an appropriately qualified and experienced person) conducts the assessment in order to maintain quality assurance.

All of those involved in the delivery of training or assessment elements of any site-specific scheme should be holders of a higher level instructor qualification such as the Climbing Wall Instructor or Rock Climbing Instructor. Staff who hold such qualifications involved in the delivery of a site-specific scheme must be working under the direction of the technical advisor of the scheme.





## 6. Transferability

Although it is possible that some site-specific schemes may be designed to encompass working on more than one venue it may be best to consider national qualifications as more appropriate for multiple venues. Furthermore, as the scheme will be designed as site-specific, it must include practical training on any additional venues to be included. This could take the form of a site-specific induction as an addition to the more generic training and assessment conducted elsewhere or could extend to the inclusion of additional skills and techniques that may have been omitted from the original endorsement scheme. Those designing such a scheme must be cautious about the inclusion of differing venues.

## 7. Links to Mountain Training schemes

It is important to educate participants in the links between the site-specific nature of the scheme and the wider world of climbing, including all aspects of climbing from indoor competitions to climbing outdoors. People undertaking the scheme should be able to ensure that participants can be guided in terms of personal progression, the nature of climbing in its broadest sense and the work of Mountain Training, the mountaineering councils, clubs and NICAS in supporting climbing and encouraging participation.

## 8. Use of these guidance notes

Any organisations wishing to develop their own site-specific climbing wall scheme may contact Mountain Training for further guidance and advice. They are, however, advised to do so in conjunction with a suitable technical advisor from the earliest stages.

**Further guidance regarding suitably qualified advisors may be obtained from**

**<https://www.mountain-training.org/about/who-can-lead-instruct-or-coach>** or the technical staff at Mountain Training.

**Information and registers of technical advisors can be found from:**

The Association of Mountaineering Instructors:

**<https://www.mountain-training.org/membership/ami/find-an-instructor>**

The British Association of Mountain Guides:

**[www.bmg.org.uk](http://www.bmg.org.uk)**







# Scheme content

Although the fundamental principles and the core content of all site-specific schemes may be similar, the exact nature of the syllabus will vary in respect of the demands of any site-specific considerations.

## 1. Structure

**A.** All schemes should operate an identifiable training phase using the site to which the scheme will relate. It may be desirable to deliver the training in two parts, comprising personal skills and group management skills. There should also be a separate assessment phase following on from a predetermined consolidation period during which candidates should gain further experience and practise skills. This consolidation period will need a risk assessment and guidance from the technical advisor. If the venue does not have access to experienced qualified instructors to observe or assist, then alternative practice at another venue may need to be arranged. It may be considered desirable to have a two-part assessment where the candidate is initially assessed for their personal and technical skills and then is assessed/observed working with a group.

**B.** The validity of the endorsement should be dependent upon the current experience of the instructor as evidenced by a logbook. This should be carefully defined in the scheme and regular reviews of experience or a revalidation process may be considered by the operating organisation. The frequency of these revalidations should take into account the experience of the

candidate and the complexity of the tasks. It is most common for revalidation to occur on an annual basis.

**C.** Climbing activities which are to be supervised by the site-specific instructor are usually bouldering or bottom and top-rope systems used in situations where the belayer does not have to climb or lead climb in order to reach the top of the route. However, other activities such as abseiling, hoists, use of auto belays and lead climbing can also be addressed. These may require specialist knowledge and experience beyond normal climbing procedures. It should be noted that the teaching of lead climbing requires high levels of experience and judgement. Technical advisors and their contracting organisations should think very carefully about the risks and investment involved in adopting a site-specific approach to meet this responsibility.

**D.** The delivery of the training and assessment sessions should be as practically based as possible and should give ample opportunity for candidates to both practise the skills of climbing and to demonstrate their abilities. Any theoretical assessment should be regarded as supplementary to the practical element.



## 2. Typical syllabus content

This is an example syllabus that may be used to introduce basic roped climbing/bouldering supervision competence to candidates. Other syllabi will need to be designed to address other forms and levels of competency (eg: autobelay supervision, adaptive climbing techniques, floorwalking, abseiling, lead climbing etc)

### A. Content of the scheme.

- The use and care of climbing equipment.
- Climbing skills and movement.
- Supervision and group management.  
Risk assessments.
- Structuring a session, simple teaching tools and games
- Accidents and incident/avoidance and procedure.
- Safeguarding children and vulnerable adults.
- PPE, work at height and HSE regulations.
- Consent/emergency contacts/medical declarations.
- Role of the UK and Ireland mountaineering councils and NICAS in sport development.

### B. The use and care of essential equipment (as appropriate for the activity).

#### Harnesses

Whilst one type of harness may only be available and/or in use in a site-specific environment, it is good practice to introduce candidates to a variety of designs. This will raise awareness of safety considerations concerning the buckling and allow them to evaluate damage and know when to refer any defects to a senior member of staff or their technical advisor.

#### Karabiners

Candidates should be able to select appropriate karabiners and be aware of correct usage (including all locking karabiners). They should

be made aware of the type of lower off attachment in use at the specific site.

#### Belay devices

Candidates may be introduced to one or a variety of belay devices appropriate to their venue. It is important that advantages and limitations of the devices are understood and that candidates can use them safely. It is also vital that an understanding of the relationship between rope type, the climbing activity and belaying device is developed.

#### Ropes

Candidates should be introduced to the types of rope used at the venue and understand their basic construction and characteristics. They should be able to identify damage, wear and take appropriate action.

#### Helmets

Candidates should be able to correctly adjust, fit and secure helmets should their use be appropriate to the facility or a requirement by the owner/manager of the facility.

#### Safety flooring/matting

Candidates should understand the role of safety flooring and matting, its basic construction and how to evaluate its condition.

#### Climbing shoes

Where these may be issued to climbers, candidates should be able to fit and check for damage.

#### Auto belays

The use of auto belays need only be covered if in use at the venue concerned. In this case the manufacturers' guidance must be followed.

### C. Skills (as appropriate for the activity)

#### **Attach rope to harness**

The candidate should be able to attach the rope using a defined and accepted method that is properly secured and constantly monitored for loosening.

#### **Knots**

Demonstrate and teach appropriate knots as required. It may be desirable for the candidate to be able to develop the skills of the client group by teaching knot tying. Any supervisor, however, would be considered as responsible for ensuring the security of those knots.

#### **Belaying technique**

Candidates must be competent belayers for roped climbing and be able to demonstrate confident and fluid belaying technique. Candidates should also be capable of showing others how to belay and correct any basic faults in their technique; and be able to employ an appropriate system to safeguard novice belayers. This could cover bell ringing.

#### **Climbing movement**

Demonstrate basic climbing movement. The candidate should show understanding of how to use the body to climb efficiently and should be able to communicate that understanding to others.

#### **Injury prevention**

Demonstrate a working knowledge of the principles of warming up, warming down and injury avoidance. Whilst the degree of sophistication of this knowledge will vary from scheme to scheme the candidate should, as a minimum, be able to structure a climbing session to minimise the risk of injury and maximise the physical benefit to the participants.

#### **Problems**

Describe the common problems that may arise during climbing and bouldering sessions and take steps to avoid or minimise their likelihood. Supervisors may be the only technically competent person on the site so must be able to deal with any foreseeable issues that may arise.

They must have a clear understanding of all safety procedures including how and where to get help, what first aid or emergency equipment is stored on site and how to access it. They should be aware of where the accident and near miss books are kept and what type of incidents need recording or reporting to the technical advisor and authorities.

## D. Supervision

### Belaying

Supervise others belaying. The candidate should know how to supervise participants with a range of abilities including when and how to intervene. They should also understand the difficulties associated with supervising a number of belayers. Positioning and line of sight should be a focus of this training. They should understand the problems associated with widely differing bodyweights in a group and be able to cope safely with them. Candidates should understand the benefits and limitations of different backup systems including ground anchors (if available) and be able to deal with holding an unexpected fall. Communication, terminology and particularly noise environments will also need to be considered.

### Management

Manage a group at the specific site. Candidates must show an understanding of the needs of other wall users and ways of working that do not inconvenience or put others at risk. They also need to develop strategies for controlling groups within their wall environment. An agreed safety briefing may be discussed relating to the removal of jewellery, not leaving the ground without instruction, lowering off, paying attention to the rope (not the climber), spinning holds, bolt hangers etc.

### Bouldering

Many site-specific schemes will be for bouldering only venues and detailed guidance for the supervision of bouldering can be found in our document: [Bouldering guidance on sessions delivery and supervision](#).

However, roped climbing supervisors should also be able to use the activity of bouldering (including low level traversing) to develop skills and strength in participants. They should be able to control the activity in order to minimise risks (e.g. the imposition of height limits and down climbing rather than jumping). They should also understand what constitutes safe practice at their site. Candidates must appropriately brief participants in safe usage of a bouldering area and explain the risks as necessary. They should be able to solve simple foreseeable problems in a bouldering area.

### Working practices

Specific venues may have child and adult at risk safeguarding policies that need to be observed. Candidates should be aware of the need to work in such a way as to maximise the safety of children and adults at risk, creating a safe space for learning. They should also be aware of the need to observe sensible precautions for their own security and the prevention of any allegations. Harness fitting and spotting/supporting climbers are two examples that should be addressed. It is recommended that candidates attend a sports safeguarding course such as those delivered by UK Coaching ([ukcoaching.org](http://ukcoaching.org))



## E. Session structure

Candidates should be given some pointers and tools to run a quality session in addition to running a safe session. Consideration of the desired outcomes and learning objectives for a session should be raised. Suggestions for basic session structures that are appropriate for the physical and mental development of the participants should be presented. Warm ups, teaching input, skills practice, goal setting, simple development of skill/difficulty, adaptation for individuals, reviews, games and challenges all make for an engaging session that will stimulate the participants. For further development in these skills candidates could be referred to the FUNdamentals of Climbing courses delivered by the mountaineering councils:

- [Mountaineering Scotland](#)
- [BMC](#)
- [Mountaineering Ireland](#)

## F. Knowledge

Safety requirements: Candidates should be familiar with general and site-specific safety requirements. They should be aware of any rules and regulations that may apply to both ordinary participants and supervised groups.

Knowledge of the activity: Candidates should be able to inform participants about the wider world of climbing and relate the site-specific to the many other facets of the sport. It would be advantageous if they could signpost participants to opportunities for future development, such as mountaineering council workshops and publications or NICAS (National Indoor Climbing Award Schemes).

## G. Possible additional elements (Subject to site-specific requirements)

- Placement of ropes where they are not in situ and top access is not available. This could be done by the supervisor leading a climb or ascending by other means as agreed with the technical advisor. Group management and supervisor safety should be paramount.
- The use of auto belays, their management, maintenance, risks and problem solving.
- The management of groups abseiling on artificial structures.

This is not an exclusive list.

# Appendix 1

Technical advisors are very common in the adventurous activities industry, providing advice on a range of activities. Below are some of the attributes an organisation should expect a technical advisor to hold and services provided.

- To be qualified as a Climbing Wall Development Instructor or higher for a minimum of five years.
- To hold other relevant qualifications in relation to the area to be advised upon e.g. Development Coach
- To be a member of the MTA, Mountain Training Association; AMI, the Association of Mountaineering Instructors or the BMG, British Mountain Guides. All these organisations have professional standards to which their members must comply.
- To have experience of delivering similar site-specific endorsement schemes to other organisations.
- To have additional relevant experience in relation to the area to be advised upon e.g. climbing wall management, routesetting, coaching, safeguarding etc.
- To have attended recognised training on the role of the technical advisor.
- To hold appropriate insurance indemnifying themselves in the delivery of a site-specific endorsement scheme.
- To provide, in advance, a clear outline of the costs involved in delivery of a site-specific endorsement scheme, the time commitment and standards required of staff undertaking the scheme and the length of time between revalidation, where this is required.



# Further Guidance

Anyone seeking training for themselves and/or their staff may wish to ask a prospective technical advisor any of the following questions:

**Q. Have you read the site-specific guidance published by Mountain Training?**

**A.** Hopefully – the answer is yes – if not find another technical advisor.

**Q. Have you delivered site-specific training for other organisations similar to the training that I'm looking for? And if so, could you let me know which organisations they are?**

**A.** They should be able to provide references or at least evidence of previous delivery.

**Q. Do you hold a relevant qualification as recommended by Mountain Training?**

**A.** A Climbing Wall Instructor/Rock Climbing Instructor is not considered an appropriate qualification for anyone to direct a site-specific scheme. They may help to deliver a scheme but only under the direct supervision of a Climbing Wall Development Instructor or above.

**Q. Do you deliver any of Mountain Training's climbing qualifications such as the Climbing Wall Instructor, Rock Climbing Instructor or Climbing Wall Development Instructor?**

**A.** It is recommended that Course Directors for site-specific training are existing Mountain Training providers of these qualifications and have attended accredited technical advisor training.

**Q. How long will the training take?**

**A.** This is dependent on numbers and course requirements as the facility will often dictate what is required. Most providers will stipulate between six and 12 hours contact time depending on the level of experience. Courses are generally run over a day and a half, or three evenings, and would normally be delivered on a ratio of 1:6.

**Q. Do my staff require any prior experience to attend the training?**

**A.** No, although some basic knowledge would be an advantage.

**Q. Once trained, how many climbers could my staff supervise?**

**A.** This is almost impossible to say as there are many variables and would be entirely dependent on the activities to be undertaken; the facilities; the age, experience and ability of the climbers; the operational procedures employed; as well as the skills and experience of the supervisor/s. All ratios and maximum numbers should be determined by a risk assessment made by a competent person.

**Q. Would my staff need any refresher training at a later date? If so, how often?**

**A.** As with first aid, periodic revalidation is normal practice for a leader undertaking a site-specific endorsement scheme.

**Q. What is the legal situation regarding advice given by a technical advisor?**

**A.** Technical advisors would normally be covered by insurance to offer advice. However cover can vary so they should be able to produce evidence. It is the client's responsibility to take their advice or not.

**Q. Once assessed, does the trainer/assessor take responsibility for the candidate's ongoing performance?**

**A.** No, the technical advisor will issue a 'pass' or statement of competence where someone has demonstrated an appropriate standard on the day of the assessment, rather like a driving test. Outside of that it will be the responsibility of the climbing wall manager/teacher in charge to see that standards are maintained.

**Q. Are you current and in practice?**

**A.** They should be able to point you to their association membership, and record of continuing personal and professional development.



## Appendix 2

Climbing and bouldering walls must meet the Health and Safety standards as set out by the HSE. In order to do this each site will need to:

- Have a named person with overall responsibility for the management and maintenance of the climbing wall.
- Have a named technical advisor, who will provide expertise and work with the organisation to develop and maintain suitable operating procedures and training schemes.
- Ensure that written risk assessments and operating procedures are kept up to date for all aspects of the climbing wall maintenance and use.
- Ensure that teachers and other adults who supervise climbing activities are recognised as competent through national climbing qualifications or a site-specific endorsement scheme.
- The scheme should support good practice, encourage learning and point to further opportunities for climbers and climbing supervisors.

### **Additional considerations might include compliance with:**

- Health and Safety at Work Act 1974.
- Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 1995.
- Working at Height regulations (Amendment) 2007.
- Provision and Use of Work Equipment Regulations (PUWER) 1998 – Equipment inspection.
- Lifting Operations and Lifting Equipment Regulations (LOLER) 1998 – Equipment Inspection.
- Association of British Climbing Walls (ABC) Guidelines
- British Standards for Climbing Walls:  
BS EN 12572: Part 1 – Climbing Structures,  
Part 2 – Bouldering Walls, Part 3 – Climbing holds.  
BS EN 12503 -1 – Matting.



# Appendix 3

A mock example of a Statement of Competence can be found below:

**Ivana Crimp**  
**Climbing Wall Development Instructor,**  
**Development Coach**

**Statement of competence for delivering sessions on the indoor wall at Suchagood School, Rockhampton.**

**Candidate: Ms Abi Seiler**

Abi has been a member of the PE staff at this school for five years and has assisted me delivering sessions on the school wall several times. She also attended a site-specific training and assessment on the 28 July and 10 August 2015 respectively. Both courses were based on the School Wall at Suchagood School. The course lasted for a full day and included an element of training followed by a short assessment where I observed all the trainees working with novices from the school.

Syllabus areas covered included:

- A.** The sport of climbing, its development and its ethics.
- B.** The scope of the scheme.
- C.** Use and care of essential equipment.
- D.** Climbing skills and movement.
- E.** Supervision and group management.
- F.** Risk assessments.
- G.** Accidents and incident/avoidance and procedure.
- H.** Child protection /vulnerable adults.
- I.** PPE, work at height and HSE regulations
- J.** Consent/emergency contacts/medical declarations.

This statement of competence is for Abi supervising sessions on the wall with youngsters during and after normal school hours. Groups will be limited to six unless Abi is working alongside another member of staff who will also have

completed the same site-specific training and assessment process. Abi is an experienced teacher.

Previous to this school she taught at Someotherschool after completing her teacher training. She has some outdoor climbing experience and has also recently updated her first aid certificate.

Abi should restrict herself to the general supervision of groups using the wall including belaying, top roping and teaching rope work as appropriate, such as attaching the rope to a climbing harness. However, she cannot teach leading, sign off any other member of staff or act as a technical advisor. As the wall has a small, easily accessible abseil tower she may supervise abseiling from the tower. In this instance she must limit herself to a maximum of three abseilers off the ground at any one time.

Abi must keep a log of the sessions she delivers which must be verified by her head of department and will be reviewed by me every six months.

This statement must be reviewed in 12 months by either myself or another technical advisor to ensure that Abi remains current and competent.

I also advise that myself or another qualified and experienced person makes occasional visits to the wall during sessions to ensure good practice in overall safety management of the indoor facility at Suchagood School.

**Signed:** Ivana Crimp – Technical Advisor

**Date:** 16.11.23

**Signed:** Ms Abi Seiler – Suchagood School



# Suchagood School Indoor Wall Rockhampton

## Site-Specific Training/Assessment

This is to certify that  
**Ms Abi Seiler**

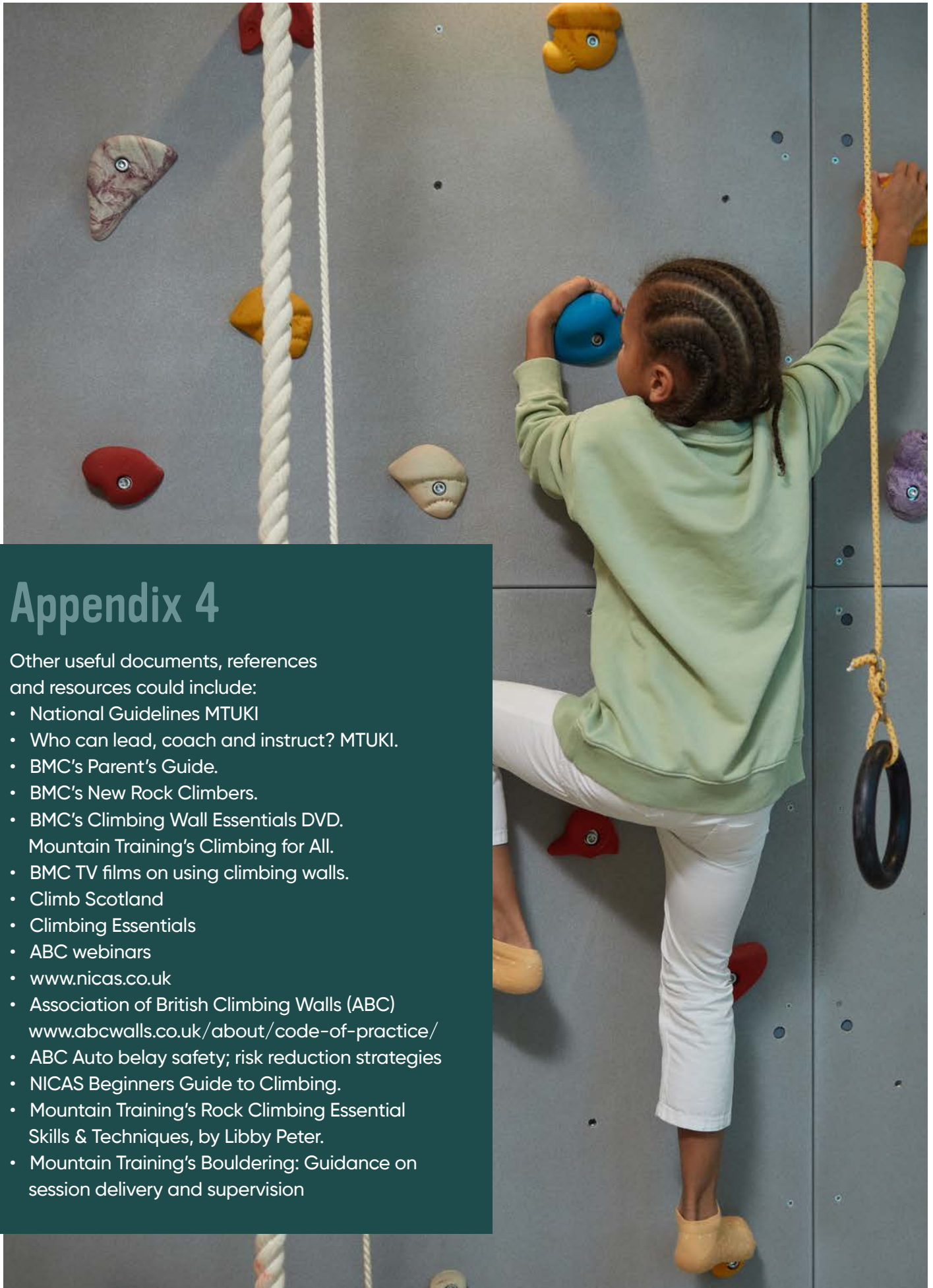
passed a site-specific assessment on the above named wall on the  
**16 November 2023**

They must be reassessed at the same venue within 12 months of the above date.

Syllabus areas included:

- A. The sport of climbing, its development and its ethics.
- B. The scope of the scheme.
- C. Use and care of essential equipment.
- D. Climbing skills and movement.
- E. Supervision and group management
- F. Risk assessments.
- G. Accidents and Incident/avoidance and procedure.
- H. Child protection/vulnerable adults.
- I. PPE, work at height and HSE regulations.
- J. Consent emergency contacts/medical declarations.





## Appendix 4

Other useful documents, references and resources could include:

- National Guidelines MTUKI
- Who can lead, coach and instruct? MTUKI.
- BMC's Parent's Guide.
- BMC's New Rock Climbers.
- BMC's Climbing Wall Essentials DVD.
- Mountain Training's Climbing for All.
- BMC TV films on using climbing walls.
- Climb Scotland
- Climbing Essentials
- ABC webinars
- [www.nicas.co.uk](http://www.nicas.co.uk)
- Association of British Climbing Walls (ABC)  
[www.abcwalls.co.uk/about/code-of-practice/](http://www.abcwalls.co.uk/about/code-of-practice/)
- ABC Auto belay safety; risk reduction strategies
- NICAS Beginners Guide to Climbing.
- Mountain Training's Rock Climbing Essential Skills & Techniques, by Libby Peter.
- Mountain Training's Bouldering: Guidance on session delivery and supervision

# Appendix 5

Comparing Mountain Training qualifications with site-specific endorsements

	Mountain Training qualification	Site -specific endorsement
<b>Remit</b>	As defined by national scheme; published in scheme handbooks with syllabi and guidance notes.	As defined by the technical advisor for the specific venue
<b>Scope</b>	Covers all UK and Ireland climbing walls	Named site/s only
<b>Lifespan</b>	Lifetime qualification; employer responsible for ongoing training.	Usually limited for 1-2 years before revalidation is required.
<b>Level of competency</b>	Varies depending on scheme but all Mountain Training qualifications equip holders with the judgement skills to operate independently.	Varies with each scheme but generally endorses to a lower level of judgement, requiring a management structure for support.
<b>Recognition</b>	Broadly recognised by wide range of UK and Irish national bodies, HSE (AALS) and mountaineering councils. Also widely recognised by insurers.	None specifically.
<b>Portability</b>	Fully portable to all relevant climbing and bouldering venues around the UK and Ireland.	Limited to stipulated site/s.
<b>Quality assurance</b>	Significant national resource to quality assure every training and assessment course. All courses reported on UK and Ireland database with extensive moderation programme.	Reliant on technical advisor
<b>Development</b>	Schemes constantly reviewed with wide consultation to meet current needs of the sector.	Reliant on technical advisor
<b>Support and pathways</b>	Candidate support and development pathways provided by Mountain Training	Limited to technical advisor.
<b>Costs</b>	Registration fee to Mountain Training and course fees to course providers.	Package fee to technical advisor.

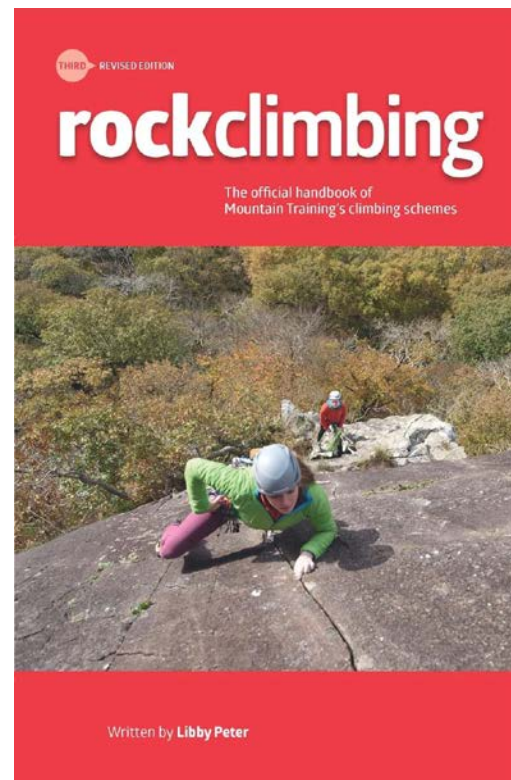
# Found this guidance useful?

These Mountain Training publications will be useful too:



## **Bouldering: Guidance on session delivery and supervision**

This document provides guidance for instructors, coaches, supervisors and assistants engaged in the supervision of bouldering. It can also be used by trainers and assessors of in-house site specific schemes relating to the delivery of safe, high quality, bouldering sessions, both indoors and out, throughout the UK and Ireland.



## **Rock Climbing Essential climbing techniques**

This book is a reference tool for every climber, from novice to expert, as well as containing specific ideas for anyone wanting to help coach and instruct others. It is the official handbook for the UK and Ireland qualification system that includes all of Mountain Training's qualifications as well as their Rock Skills courses. It is endorsed by the BMC, Mountaineering Scotland and Mountaineering Ireland.



