

**Association for Experiential Education
ALDO LEOPOLD CHARTER SCHOOL
Program Review Report**

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**Consultant:
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**Review Dates:
May 5-7, 2016**

Date of Report: 24 January 2017

Report Written by: Michael Lindsey

Organization: Aldo Leopold Charter School (ALCS)

Introduction:

The review consisted of three days of reviewing school documents before site review, and two and a half days of program evaluation at the ALCS in Silver City New Mexico. The review began meeting Eric Ahner, School Director, to discuss the scope of the review and get oriented to the school and its campus. The next two days consisted of interviews of approximately fifteen administrative and field staff. The focus of this review was the Experiential Education Activities. These consist of mostly partial or one day programs to introduce basic skill development in a number of activities (e.g. mountain biking, backpacking, day hikes, internships with Youth Conservation Corp (YCC) and others. The backpacking program has a multiday fall component, an integral part to begin the school year.

ALCS identified the following areas for the review:

1. Program Management, Operations and Oversight

- a. Risk Analysis and Hazard Assessment for Activities
- b. Risk Management Committee
- c. Internal and External Reviews
- d. Staff to Participant Ratios
- e. Wilderness Medical Protocols
- f. Emergency Action Plans – Field and Administrative
- g. Accident/Data Reporting
- h. School Activity Plan

2. Human Resources: Staff Selection, Hiring, Training and Supervision

- a. Training and Orientation
- b. Evaluation Process
- c. Training for Supervisors
- d. Field management duties

3. Participants

- a. Medical Evaluation
- b. Appropriateness of Activities
- c. Disclosure of Risk/Informed Consent

4. Transportation and Equipment

- a. Clothing and Equipment
- b. Maintenance and Documentation
- c. Transportation

5. Policies and Procedures

- a. Written Policies
- b. Communication of existing and new policies

Document Review:

A number of documents were sent before the review. In addition, the reviewer examined a plethora of additional documents at the headquarters. The individual documents are too lengthy to mention. The major documents reviewed:

1. Backpacking Risk Management Guidelines
2. Employee Handbook
3. ALCS Safe School Plan
4. Fleet Management (Driver Training)
5. Backpacking, Mountain Biking, First Aid Training and Tests
6. Multiple Summaries of Airplane Accident in May of 2014
7. Equipment Management
8. Risk Management (annual safety reports, site management processes etc.)
9. Risk Release Forms
10. Staff Training (Administration and Field Staff)
11. Staff Hiring, Evaluation, Certification and Tracking
12. Vendor Contracting
13. Emergency Action Plans
14. Activity Approval Process
15. Organizational Chart
16. Risk Management Committee Scope of Work
 - a. RM Task List
 - b. Agenda & Minutes for Jan-April 2016
17. Internship Policies and Tracking
18. Staff Certifications

Interviews:

The reviewer met with staff, students, administration, parents and community members over two days.

1. Esther Jamison – Social Studies and Language Arts, Backpack leader
2. Jim McIntosh – Math, Science, RN, Risk Management Coordinator (FY17)
3. Kim Hopwood - Special Education Coordinator and Assistant Principal
4. Laura Larisch – Middle School math and science
5. Maddy Alfero – Science and PE, Backpack (BP) Leader
6. Ten Senior students
7. Eight Middle School Students
8. Pete Rankin – Social Studies and BP Leader
9. Allison Heneghan – Science and Health BP Leader
10. Catalina Claussen – Language Arts, PE and BP Leader.
11. Harry Browne – Business Manager and math. BP Leader

12. Claudia Preusch- Internship Coordinator
13. Mary Gruszka- Parent, on Governance and Risk Management Committees
14. Heidi Pendelton- Parent

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.

The Review:

This report will comment on the specific areas mentioned above. Following each area, there will be a comment. Areas requiring more in-depth consideration will have a recommendation or suggestion.

- **Comment:** How the practice or activity is addressing risk management standards.
- **Recommendation:** How the practice may be improved and be in more in alignment with AEE standards and/or industry practices.
- **Suggestion:** An opinion of the reviewer, that ALCS may want to consider implementing, or conducting further examination.

Program Management

Hazard Assessment and Risk Analysis for Activities

Written Policies and Procedures

Backpacking

Comment: Backpacking is a key part of the ALCS experiential education component. Students do one to multiple day trips. In the fall, high school students do an extended training in backpacking skills and risk management. This includes first aid, field practices, fitness and written tests to mention a few. Students are required to pass all tests before participating on the fall extended trip. While there are a number of 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.)

Biking

Comment: The biking program also has a test for students and staff to successfully complete before the bike trips. The biking program does have set policies that guide the staff in managing the trips.

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.

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.

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.

Participants Informed of Hazards and Their Involvement in Management

Comment: Students unanimously shared they were always involved in pre-activity briefings. Risks are identified and methods of mitigation discussed, including how they will participate in course management. Parents are also informed before each overnight activity and, in cases of identified potential increased risk, sign permission slips.

Medical History Is Known and Managed for Students and Staff

Comment: Students complete a sports physical for each school year. In addition, any medical issues that have potential implications are identified and a nurse informs staff how to manage conditions in the field. Students with certain medical and fitness conditions, camp at road heads and are managed accordingly. Regarding sharing staff medical conditions, due to the small size of the community, staff “generally” are aware of their fellow staff’s conditions.

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.

Staff to Participant Ratios

Comment: the reviewer saw staff-to-student ratios for backpacking and biking. There may be others in place, however he did not see them.

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

Emergency Action Plan

Comment: ALCS has a robust EAP. They have clear procedures for field, administration and Governing Council actions and duties. They have modified the Incident Command structure to align with their school's organization.

Wilderness First Aid Requirements

Comment: All backpacking staff have required annual first aid training. They have a number of staff with Wilderness First Responder; this is recommended for backpacking staff. They have periodic in house staff training and are tested annually during the fall training for in injury scenario management.

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

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 it's use.

Risk Management Systems

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 the 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

- Identify areas of concern that could benefit from increased scrutiny and consider having an external “subject matter expert” conduct a review

Risk Management Committee

Comment: ALCS has an active and engaged committee. They meet once a month to review incidents and policy, activities and ongoing risk management strategies. The reviewer examined agendas for this school year’s meeting of the committee and interviewed a committee member. They developed a “Risk Management Task List” that tracks goals for the committee and ranking of importance. They also plan to have an annual Risk Management Review that will dovetail with the incident and data management annual report (see above).

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.

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.

Administration Risk Management Systems

Comment: The School Director currently is the “safety director” of ALCS. He has a plethora of personal and management experience in risk management, staff training, and systems implementation. He has capacity to “wear multiple hats” and administrate complex programing. He will be leaving in July for a new position and has designated a staff as Risk Management Coordinator.

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

Program/Activity Approval System

Comment: ALCS developed a “best practice” process for approving all activities. This is an extremely detailed document that clearly delineates the staff’s requirements to offer a new activity and how the administration will review the request. It also defines what is a school activity verses a non-school activity.

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.

Staff Hiring, Training, Evaluation

Hiring

Comment: The School Director hires all educational staff. His staff conduct background checks, check references and provide all necessary documentation for his review. ALCS is a New Mexico public school and must follow all state policies for school hires.

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, 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.

Staff Evaluation for Experiential Education Activities

Comment: Currently staff are promoted from Secondary Group Leader (SGL) to Primary Group Leader (PGL) by having worked at least one or two course as a SGL. The school director then decides when SGL can be promoted to PGL. This decision currently is based on his observation in the field, and discussion the staff member regarding their level of confidence and desire to work as a PGL.

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, include:

- 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

Field Practices

Nutrition, Hydration

Comment: ALCS manages food and water intake closely. They have an excellent formula for calculating food requirements, and monitor fluid intake closely. They treat all water taken from rivers etc.

Leave No Trace

Comment: ALCS is invested in LNT practices and imbeds it in all outdoor activities

Field Communication

Comment: All programs carry field communication devices for backpacking and other outdoor pursuits. Staff are required to check in with the school daily

Transportation

Vehicle Maintenance, Driver Training, Emergency Equipment

Comment: ALCS is required by state law to meet all requirements for maintenance, driver training and on board emergency equipment. Staff are trained twice a year, and vehicles are maintained per state requirements. The state inspects the vehicle on a regular basis and logs are kept at the school.

Personal Vehicles

Comment: ALCS no longer allows the use of personal vehicles for transporting students.

Equipment

Camping

Comment: Students have the option of using their personal equipment in lieu of the school's. All personal gear is inspected and approved by staff before going into the field. The school provides most of the group gear (tents, stoves etc.). It is kept in storage and inspected before each trip.

Bicycles

Comment: Bikes are inspected before each trip. A local bike shop inspects them regularly and makes necessary repairs. During brief inspection, they appeared well maintained.

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.

Disclaimer:

Please note that although consultation may assist programs in preparing for AEE accreditation, there is no guarantee that a program will pass an accreditation review based solely based on the recommendations in the report. In the accreditation process, the burden of proof regarding compliance with AEE standards lies with the program under review.

Program Representative Signature

Date

A rectangular box containing a handwritten signature in black ink. The signature reads "Michael Lindsey" in a cursive script.

AEE Consultant Signature

6.18.16

Date