



# Hill and Moorland Leader

**Guidance notes for  
trainers and assessors**



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## Introduction

These guidance notes are designed to assist trainers and assessors in the delivery of Hill & Moorland Leader training and assessment courses. They should be used in conjunction with the Hill and Moorland Leader Candidate Handbook and national Mountain Training board quality manual. This document will be updated when necessary; a revision date can be found at the bottom of each page.

### Trainers

Trainers should assist candidates to progress towards assessment. Different candidates benefit from different styles of delivery. Although trainers have a responsibility to work to the Hill and Moorland Leader syllabus, they must also structure their courses to accommodate the varying strengths and weaknesses of candidates. Courses should concentrate on the skills that candidates may have difficulty in learning without expert guidance, whilst not forgetting that in reality the skills of good leaders are integrated into a holistic performance.

At the end of the course trainers should assist candidates to develop their action plans. It is valuable to review the course programme and the candidates' progress at the end of each day. Candidates should be given individual debriefings and should leave the training course with a good idea of what is required of them during the consolidation period.

### Assessors

Assessors evaluate the performance of a candidate against the syllabus requirements. Assessments should enable everyone to perform to the best of their ability under suitably testing conditions. Assessors should ensure that candidates understand the tasks required of them and are given sufficient opportunities to demonstrate their competence. Assessors should remember the importance of a holistic approach to the skills of good leaders by limiting the time devoted to single techniques in isolation. Assessors must provide feedback to candidates and should explain how this will be given. An assessor should make a realistic and objective assessment against the nationally recognised standard and not decide results by comparing candidates' abilities.

## 1. Group management and the responsibilities of the group leader

### Trainers

Training in leadership needs to be a balance between a theoretical and practical approach to group management and the leader's responsibilities. Teaching of leadership works best if it is integrated into practical skills training, whereas 'accident' and 'emergency' exercises may well be simulated. Trainers should include the more commonplace leadership tasks that occur, for example managing a group over rough terrain encountered as part of a planned journey in the hills. Training staff should recognise that they are acting as role models for candidates through their own practice during a course.

Trainers should be well versed in the literature on leadership and the responsibilities of a leader, as specified for candidates, in addition to developing their own resources. Trainers should draw on their own and the candidates' experiences to discuss and expand this topic in the classroom and on the hill.

Trainers should ensure that candidates are made aware of the importance of assessing the strengths, weaknesses and needs of the group and planning the journey accordingly. Trainers should discuss with candidates how best to carry out initial preparation and budgeting exercises and how to complete detailed planning before leading walks in the hills. As well as consolidating candidates' personal experience and skills, trainers should identify differing styles of leadership e.g. coercive, permissive and cooperative and outline the characteristics of each. Candidates should be made aware of some of the formal requirements of the planning process such as gaining parental consents, organising insurance and obtaining organisational permissions.

Risk assessments should be discussed and undertaken. Although remote supervision is not within the Hill and Moorland Leader syllabus, trainers should make the candidates aware of the different methods of supervising groups at a distance, e.g. 'shadowing', designated meetings with a supervisor or written messages left at specific points. Procedures for when and how the group leader or the group might call for assistance should also be discussed. Candidates must be aware that unaccompanied journeys should only be undertaken with suitably experienced groups.

Trainers should provide opportunities to analyse situations as they occur during practical sessions and review exercises, which involve an element of leadership.

### **Assessors**

Assessors should examine the candidate's ability to undertake risk assessments for planned journeys and their strategies for dealing with emergency situations. During the practical assessment candidates should be presented with some common emergency situations.

It is difficult to provide genuine leadership situations on assessment. Groups of assessment candidates are not likely to react like a novice party. Assessors should be clear in their own minds as to which aspects of leadership they can assess within the structure of the course. They should carefully consider how they use simulated situations for assessment and should make clear to candidates what is being assessed at any given time. Self-evaluation should be encouraged as the scheme depends upon leaders being aware of their strengths and limitations.

Planning skills can initially be assessed with a home or evening written paper but they should not be looked at in isolation from candidates' abilities to lead a group effectively on the hill.

Candidates' understanding of different styles of leadership should be assessed. Candidates should be able to identify the style with which they are most comfortable and be able to make judgements as to when changes of style might be appropriate when leading a group. Assessors should give candidates opportunities to show understanding of the issues surrounding effective management in a variety of hill and moorland terrain.

Certain aspects of group management, such as pace setting, briefings and communication are relatively easy to evaluate, as are the choice and preparation of personal equipment, selection of routes over varying terrain and reaction to set emergency situations. However the best course of action for unanticipated situations has to be weighed carefully against possible alternatives. It is common for these situations to be used as further training for the benefit of all concerned.

It can be beneficial to assess candidates operating with near-novice groups. However, great care should be taken to see that no party is adversely affected by the experience. It is possible that an unsatisfactory day could be given to either the candidate or the group; assessors must therefore satisfy themselves as to what is to be gained from this exercise. When working with groups, candidates should be briefed thoroughly and given full charge of the group, thus allowing the development of a proper relationship. The assessor may then act as the assistant leader and only intervene for elements of further training or if the group's safety is in question. It is not generally satisfactory to have more than one candidate involved with a group during any one session. The candidate's role and commitment to the group and the group's reaction to the leader need careful observation; only very experienced assessors should take on this task and even then, the welfare of the group must come first.

Assessors should give daily debriefs, with special regard to leadership aspects. Such sessions will provide a vital platform for discussion and opportunities to compare the perceptions of all parties involved.

## 2. Navigation

### Trainers

Whilst candidates will be expected to be reasonably proficient navigators this may not always be the case. Many experienced walkers have done little navigating in poor weather conditions or have employed only a limited range of techniques. Others may have mainly followed paths and used walking guides.

Teaching all the basic navigation skills will be beneficial. This will be revision for some but could be used as a model for those candidates who are in a position to teach basic navigation to their own groups. Trainers should teach navigation in relation to group leadership, including route selection and party supervision, remembering that candidates must cope with both navigation and leadership issues simultaneously.

Maps of different types and scale should be available during the course. The use of navigation aids such as global positioning systems and altimeters should be discussed and a practical demonstration given wherever possible. Candidates should be encouraged to use the appropriate technique at any particular time and also to pay attention to the terrain around them.

Trainers will use night navigation sessions when no poor visibility navigation has been possible during daylight hours and may also wish to include night navigation even if poor visibility has been encountered, as it is not uncommon to be walking off the hill in poor light. It should be remembered that on a clear night, navigation may be no more difficult than in daylight.

Navigation should be presented in a structured form so that the candidates can progress throughout the course. The candidates should finish the course being aware of the level of navigation ability required and what they need to do to achieve this.

### Assessors

The assessor should structure the tasks to ensure that all relevant navigation techniques are seen. Navigation will be assessed throughout the course so assessors can usually afford to settle candidates by initially setting simple navigation tasks. Assessors need to be certain that any errors are through lack of ability rather than as a result of 'exam nerves' or their own failure to communicate clearly. Very careful and precise briefing of the candidate concerning what is being asked of them is

essential. The other candidates must also be briefed about their role while someone else is leading the group.

Candidates should be given time to demonstrate their level of navigation ability to the assessor. They should be allowed to complete the task to the best of their ability and not be pressured into making quick decisions and mistakes. Candidates should be given the opportunity to demonstrate their ability to adopt the appropriate technique for the situation. The assessor should look at the task set from the viewpoint of someone navigating over unfamiliar ground in a stressful situation.

A balance must be struck between micro-navigation, often assessed in a moorland situation, and the broader style of navigation used when following a path or defined feature. Micro-navigation can allow a large number of comparable legs to be set in a relatively short space of time. However, a hill/moorland walk can also provide opportunities to assess navigation while reminding everyone of the nature of the activity. In all cases the elements of group management, leadership and environmental issues should not be neglected.

Visibility will obviously influence the type of navigation tasks set, as assessors must satisfy themselves that candidates can navigate in the full range of weather conditions. When the weather is good more accurate navigation can be asked for to compensate for the lack of poor visibility. At these times night navigation may well be required although this is no guarantee of poor visibility. In these situations the skill of the assessor in selecting the appropriate terrain and setting suitable tasks is vital to the success of the assessment. Every navigation task set should help the assessor to draw relevant conclusions about the candidate.

Candidates who make a simple mistake should be given time to resolve the situation. The ability to identify and correct an error is both an essential skill for a leader and an informative process for an assessor. The choice of appropriate techniques and the efficiency of their application may be as important as the arrival at a designated point for the assessment process.

Navigation ability must be tested with map and compass alone without the use of GPS, altimeter or other similar equipment. If candidates carry navigation aids their ability to use them may be discussed as an additional training element.



### 3. Access and the environment

#### Trainers

Continued use of the outdoor environment depends on sensitivity and an awareness of other land use interests. This aspect of the syllabus is therefore fundamental and should be integrated throughout the course as opportunities arise. It is recommended that a discussion session complements the evaluation of practical examples during the course. It is desirable that some venues which specifically highlight environmental issues are selected.

Recreational use of upland areas represents only one of the many demands placed upon these environments. These demands may at times conflict and trainers have a responsibility to ensure that candidates have sufficient knowledge to operate without inadvertently creating tension with other land users.

Upland areas, where the climate can be severe, are often sensitive to change and opportunities should be built into a course to illustrate the impact of recreational and other land use on the balance of habitats. Measures to minimise or control these effects should be illustrated during a course.

Trainers must be aware of current legislation as it affects the upland areas of the UK. It is common for candidates to have limited personal experience or involvement in these issues and trainers should ensure that candidates leave the course with an understanding of the current legal situation.

Leaders may operate in unfamiliar areas. It is therefore essential that they know how to obtain current information about access. Trainers should ensure that candidates are fully aware of the significance of Rights of Way and access arrangements as shown on maps. They should also appreciate the different legal rights in different areas of the UK. Many areas appropriate to the Hill and Moorland scheme are designated as being of particular environmental or historical value. The implication of these designations should be impressed upon the candidate.

The principles embedded in the accepted codes of practice should be embedded throughout the course. The concept of an environmental audit i.e. a consideration of the environmental impact of one's activities could form a useful part of the course.

It is important that on a training course, staff try to impart knowledge about differing aspects of the environment. Candidates should be encouraged to discuss areas of personal expertise with the rest of the group and to impart what knowledge they may have. Candidates can be helped to develop the confidence to talk about their knowledge through a positive demonstration by training staff. Guidance may be given on resources available for further development. Mountain Training has developed a sample environmental paper (see Hill and Moorland Leader



Candidate Handbook Appendix 5) which may well be used to demonstrate an appropriate level of knowledge.

### **Assessors**

An assessor can gain an understanding of candidates' experience and attitudes towards this crucial aspect of the syllabus by reviewing their DLOG and asking follow-up questions. Although a written paper may be of value and provide a stimulus for worthwhile discussion, this aspect lends itself to be evaluated throughout a course either as opportunities arise or as they are engineered by the choice of venue. It is common for a candidate to be asked to prepare a discussion topic and then lead a group session on relevant local or national access and environmental issues.

The criteria applied to the assessment of this area of the syllabus, with its wide range of topics and possible levels of expertise, will need to be flexible. It should, nonetheless, be a clear part of the assessment process and should play a part in any broader assessment decision. Issues of access and the environment are of fundamental importance in effective outdoor leadership. Assessors should not hesitate to defer a candidate if they feel that the range of experience demonstrated contributes to a serious lack of awareness of the importance of access and the environment or that the practice of the candidate has, or may have, a negative impact. Assessors may look for knowledge and enthusiasm over a wide range of upland related subjects but should not expect equal levels of expertise across them all.

A positive attitude to learning and imparting knowledge on the part of the candidate may well be the over-riding concern. The assessment of candidates in this area of the syllabus needs to be flexible and allow for variations in personal interests and depths of knowledge. Mountain Training has developed a sample environmental paper (see Hill and Moorland Leader Candidate Handbook Appendix 5) which may well help assessors understand the expected standard.

Candidates should be familiar with current legislation that may differ between the home nations.

Assessors should be confident that candidates are aware of the other interests, both commercial and recreational, in upland areas. They should be particularly aware of and sensitive to the potential conflict between their own imported values and those of local communities. Assessors must be confident that a candidate in no way jeopardises existing arrangements through insensitive actions.

Recreational pressures may contribute to the loss of access to certain areas as well as a degradation of the physical environment. Assessors should therefore feel free to offer additional training at assessment in this aspect of the syllabus.

Knowledge of sources of current information is vital to planning any route. It is possible to incorporate this in a planning exercise during an assessment course. This would provide opportunities to discuss real situations as they arise and to offer further training.

The implications of the various protection designations should be understood, as should the value of the relevant code.

## **4. Hazards and emergency procedures**

There are a number of distinct types of hazard that might arise in the outdoor environment. These are best considered under separate headings, although avoiding or dealing with them may involve many of the same principles.

### **Hazards of steep ground**

#### **Trainers**

Hill and Moorland Leaders must be able to identify and avoid steep ground and cliff edges. Steep ground is defined as either broken or vegetated slopes possibly with a proportion of visible rock, well-defined outcrops or very steep, unbroken vegetated slopes. Steep escarpments, often surrounding moorland areas and the terrain described above must be avoided when planning routes, and any features such as described above must, at the very least be easily avoidable by walking around them.

The main focus of this area of the syllabus should be the recognition of the terrain of what is acceptable and within the scope of the award and what is not. It is quite possible that there may still be some situations that group members find intimidating even if there is no danger of a slip; trainers will have to brief candidates on group management strategies so they can be discussed and demonstrated as opportunities arise.

It is important that candidates are introduced to the idea that there is a continuum of types of terrain which will tend to dictate the appropriate technique. Verbal reassurance and simple physical support are important skills, as is an awareness of where those techniques are appropriate.

Trainers may find it beneficial to explore the boundaries of the award so that candidates can gain a really clear idea of the terrain that is acceptable and terrain which is outside the scope of the scheme.

### **Assessors**

When assessing this aspect of the syllabus the assessor should examine the skills of group management on appropriate terrain and ensure that candidates have a really clear view of what is acceptable to the Hill and Moorland Leader and what falls beyond the scope of the scheme.

The recognition and avoidance of steep terrain are of paramount importance to a Hill and Moorland Leader. However, candidates still need to be aware of group management strategies as some group members may find some of this terrain intimidating, even if there is little or no danger of a slip.

### **Environmental hazards**

#### **Trainers**

These subjects are most easily covered in a lecture or tutorial session although they can be referred to at any suitable point during the course. For example, a closed footpath or deep tussocks may cause a delay, while flooding and water hazards are often interrelated.

#### **Assessors**

The candidates' understanding of environmental hazards can be examined by means of written questions or by informal discussion throughout the course, especially when relevant situations arise. It may be beneficial to use areas where terrain hazards can be used to test the judgement of candidates.

### **Water hazards**

#### **Trainers**

Water hazards encompass a number of aspects such as dealing with bogs, marshes, streams and rivers. Training should be a combination of theoretical and practical work with the emphasis firmly on the recognition and avoidance of water hazards. Leats, sometimes referred to as culverts and weirs, are a common feature around many water catchment areas and can be particularly dangerous especially, but not exclusively, during or immediately after heavy rain.

#### **Assessors**

This aspect of the syllabus can be assessed through both written and oral questions and by practical demonstrations, for which group activity is acceptable. Attention should be given to hazard avoidance, sound preparation and a thorough understanding of the techniques and dangers involved in dealing with a range of potential water hazards. It may be appropriate to deliver further training once it has been established that candidates have an understanding of the potential dangers.

### **Emergency procedures**

Many leaders will come across an incident or accident and should be thoroughly prepared for these situations. It should be understood that emergencies may not be a result of an error on the part of the leader but can be the result of an unforeseen accident happening to a party member or other encountered on the hill.

### **Trainers**

Accident and emergency procedures should be covered in detail. The candidates should be taught how to evaluate a situation and take appropriate action, whether it is a minor stumble in good weather or a life threatening injury in poor weather. They should be able to keep the rest of the party safe, stabilise the situation and send for help or evacuate the casualty if necessary.

### **Assessors**

Emergency procedures can be assessed by a combination of written and oral examination and practical work. Assessors should accept that there might be different solutions to examination situations. This area lends itself to discussion, particularly in groups, when differences of opinion may arise and can be used for the benefit of all candidates.

Assessors should be confident about the candidates' knowledge and ability regarding accident procedure and their responses to emergency situations. Candidates should exercise reasonable judgement and an awareness of the consequences of any particular course of action.

## **5. Equipment**

### **Trainers**

It is important to spend some time examining and discussing equipment needs with candidates. Candidates should be aware that their equipment has implications for the safety and comfort of themselves and their group. If a candidate does not have suitable equipment, trainers should be able to offer constructive advice and discuss available options. It may be appropriate for trainers to demonstrate their own personal and group equipment, discussing items that they or other trainers may elect to carry.

Candidates should be encouraged to travel light, yet must also be able to deal with emergency situations. Informal discussions offer excellent opportunities to show candidates the wide variety of equipment that is available. Trainers should ensure that all candidates have an understanding of and ability to use the equipment they will need as leaders and the depth of knowledge required to advise others. Emergency bivouacs and group shelters should be discussed and demonstrated during a training course.

### **Assessors**

An assessment course provides many opportunities to examine the suitability of each candidate's personal equipment. Equipment should be examined with regard to safety, comfort and efficiency, allowing for personal opinion that will have been developed over previous months or years. Candidates need to be able to operate as party leaders in poor conditions and choice of personal equipment will have a bearing on their ability to do this.

A leader should be able to advise a novice about equipment for undertaking journeys in the UK. Trainers should therefore make every effort to provide a wide range of equipment for candidates to use during the course. Although candidates will frequently wish to provide their own equipment, it is important that they also have the opportunity to evaluate other equipment.

Assessors must satisfy themselves that candidates are familiar with emergency bivouacs and the equipment available to should an emergency arise.

## **6. Weather**

### **Trainers**

Trainers must be aware that weather is an important subject that has to be pitched at the correct level for the candidates. The trainer should identify the basic level of knowledge required to enable the candidates to make appropriate judgements based on commonly available information. This can be achieved through lectures, tutorials and seminars and by directing candidates to suitable material.

Additionally, it is recommended that this topic be integrated within the course on a daily basis using practical observation. Forecasts and synoptic charts should be used and compared with the local weather conditions. Interpretation and forecasting based on weather signs and patterns illustrate the practical application of this aspect of the syllabus.

### **Assessors**

Weather knowledge might be assessed through written and oral examination including the use of home papers. Asking candidates to make daily interpretations of the weather at the start of the day and then reinforcing this on the hill emphasises and places in context the relevance of weather prediction. The assessor should be confident that candidates are able to understand how to access all the commonly available types of weather forecast and be able to evaluate their relative accuracy and reliability. They should also understand those weather forecasts and understand how upland areas may be affected by the prevailing weather. Finally they should be able to integrate their understanding of the likely weather conditions into their planning as leaders.

## 7. Background knowledge

### **Trainers**

Trainers should introduce candidates to a variety of resources to enable them to expand their understanding of the development of hill walking. They should also introduce candidates to the role of Mountain Training, the Mountaineering Councils and the Mountain Training Association and of how they work with other agencies that have interests in the outdoors. This can be achieved through lectures and an integrated approach throughout the course.

### **Assessors**

Assessors must be confident that candidates operate in a suitably sensitive way in order to avoid conflict between their activities and those of other hill users.

Candidates' overall knowledge of the development of the activity and roles of national bodies should be investigated. This can be achieved through a variety and combination of ways, e.g. home papers, discussion or set course papers.

## Appendix 1

### Definitions

#### 1.1 Quality Days

Experience gained in areas other than the UK and Ireland can be recorded if undertaken in similar conditions to those found in the UK. The majority of this experience however, at least 50% of the days recorded, should be in the UK. A Quality Day will involve most, if not all, of the factors below:

Usually some or all of the following criteria would be fulfilled:

- The individual takes part in the planning and leadership.
- Navigation skills are required.
- Knowledge is increased and skills practised.
- Attention is paid to safety.
- Adverse weather and poor underfoot conditions may be encountered.
- Four hours or more journey time.

#### 1.2 Suitable terrain

The Hill and Moorland Leader Candidate Handbook (p. 33) clearly identifies terrain suitable for the training and assessing of Hill and Moorland Leaders; however for the sake of clarity the main points are reiterated here.

The Hill and Moorland Leader scheme is designed to enable individuals to operate as leaders in open and sometimes remote country where they must be skilled, self-reliant and effective leaders in what will in many cases be considered as challenging terrain. The numerous descriptive terms such as hill, moor, down, heath, bog or fell that relate to this terrain have in common the fact that they all relate to 'undulating', rather than 'mountainous' terrain. This terrain should not have significant crags and other rock outcrops other than small non-committing obstacles such as might be found on the edges of limestone pavements or low escarpments and which are easily seen and avoided on the ground and clearly marked on the map.

There should be no unavoidable extensive areas of steep ground which may present difficulties to either a leader or an individual within the party. In cases where there are no definitive linear man-made or natural boundaries between moorland and adjacent mountainous, steep or rocky areas (the terrain of a Mountain Leader) a boundary may in some cases be defined by significant terrain features that should be easily detected by the leader with appropriate navigational competence e.g. a col where descent changes to ascent. A technical adviser can provide further advice on specific examples.