



# A Tale of Two Tragedies: Identifying Changes in Outdoor Education 'Best Practice'.

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## ABSTRACT

*A multiple-fatality outdoor education event in New Zealand in 2008 revealed that a 'systems approach' towards managing risks and training staff was widely considered to be normal and 'best practice'. This approach champions audit trails and economic efficiency, and one of its characteristics is the volume of paperwork required. One of the unacknowledged repercussions of this approach is a compartmentalisation of knowledge and responsibility. But best practice was not always like this. A Foucauldian discourse analysis was employed to understand how best practice has changed and what the roots of those changes were. Disconcertingly, the 'systems approach' continues to dominate outdoor education organisations, and the conditions that appeared to play a part in the tragedy of 2008 are still considered 'normal'.*

## INTRODUCTION

The Sir Edmund Hillary Outdoor Pursuits Centre (OPC)<sup>1</sup> is a specialist outdoor education facility in the central North Island of New Zealand. On April 15<sup>th</sup> 2008, on the second day of an outdoor programme led by an OPC instructor, six students from Elim Christian College in Auckland, and their teacher, were drowned trying to escape rapidly rising water in the Mangatepopo stream gorge.

I had trained at OPC in the mid-1980s and worked there in the early and mid-1990s. I knew some of the people working there in 2008. Beyond the immense sadness of the tragedy, I was perplexed as to how this could have happened. OPC, and its Chief Executive Officer, Grant Davidson, were at the forefront of developing and promoting organisational frameworks, especially safety systems (see for example, Davidson, 2004; Haddock, 1993; Hogan, 2002; Williams, 2002). In 2008, OPC had highly trained and qualified senior staff, and a systematised approach to training and practice that was replicated in other organisations and considered 'best practice'. But if 'best practice'

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<sup>1</sup> The Sir Edmund Hillary Outdoor Pursuit Centre of New Zealand formally changed its name in 2014 to Hillary Outdoors.

resulted in the deaths of seven people, then were other organisations that also used 'best practice' at risk of a similar tragedy? Moreover, was there an alternative? Was 'best practice' different in the past?

I elected to examine these ideas by comparing the 2008 tragedy with another tragedy in 1953, to see if things were historically different in 'best practice'. An analytical framework was provided by Foucault's notion of examining normalised practices. One of the methods employed by Foucault was to compare the discourse of two different periods in the history of the formal knowledge, in order to understand how the earlier period differed from the latter period in its implicit knowledge, and then to illuminate the 'discontinuity'—the catalyst for the emergence of the formal body of knowledge. These are called 'Events' in the research, a term and a capitalisation used to encompass not only the accident and the discourses revealed in the aftermath, but the socio-historical context.

## **RESEARCH PARADIGM AND METHODOLOGY**

Discourse analysis, and especially the discourse analysis approach of Michel Foucault, is a methodology that sits comfortably within the research paradigm called 'Poststructuralism' (Grant & Giddings, 2002). Poststructuralism enables the invisible rules and the context of the formation of these rules to be made visible. It "rests on an assumption that no-one can stand outside the traditions and discourses of their time" (p. 20). This approach acknowledges that people are influenced historically, politically, culturally and often unconsciously.

### **Methodology: Foucauldian discourse analysis**

The inter-related threads of discourse, power, and knowledge underpin Foucauldian discourse analysis. Discourse in this paradigm is the use of language, spoken and written—as well as other forms of communication like photographic images or film—that structure the reality of the individual. Discourse, however, also encompasses ideas, ideologies, symbolism, working attitudes and courses of action (Holstein & Gubrium, 2005). Discourse therefore, is closer to bodies of knowledge or disciplines (McHoul & Grace, 1993).

Power refers to "the network of relations that exist between people... rather than to a property someone has more, or less, or none of" (Grant & Giddings, 2002, p.21) and the relationship between power and the historical production of what is 'truth' (McHoul & Grace, 1993). It is "exercised by people acting on the actions of others" (Foucault, 1986, p. 427, as cited in Grant & Giddings, 2002, p. 21). Discourse analysis enables the examination of complex power relationships; in particular it allows for the identification of the dominant discourse, which mainly serves the interests of the dominant social group (Grant & Giddings, 2002).

Discourse analysis facilitates an examination of taken-for-granted 'truths', or practice, or knowledge, in order to reveal the underlying formation of that 'truth' or practice or knowledge. A path can be traced from relevant points in history (what Foucault calls genealogy) to illuminate how those 'truths' or practices or bodies of knowledge have become what they are. These relevant points may not always be connected yet they mutually reinforce the discourse.

The effects of the discourse can then be examined to question how the 'truths' or practices or bodies of knowledge, might have been different (Galvin, 2002). Discourse analysis illuminates aspects of practice and experiences that may not be made apparent with other research methods. It provides an opportunity to identify oppressive practices and facilitate more enabling ones (Crowe, 2005).

### **Research Design**

In discourse analysis the participants are not subjects of research but rather subjects of discourses (Grant & Giddings, 2002). The aim of the research was to uncover the influences on the current training and practice of outdoor education in New Zealand, through an examination and interpretation of the discourse around both current practice and historical practice.

### **Methods**

For the purposes of this study, the time frame of interest was post-World War Two. Data was collected using the following procedures:

1. A review of the research literature relating to outdoor education in New Zealand, specifically looking for dominant themes influencing practice.
2. A review of the wider literature relating to adventure sports and adventure education, in New Zealand and internationally.
3. A review of media commentary and coverage of two high profile New Zealand outdoor tragedies.
4. Semi-structured qualitative interviews with very experienced (greater than 20 years) outdoor educators in New Zealand.

The data collected was specifically examined for dominant themes, or discourses, influencing practice. The discourses that emerged were then further explored through the semi-structured qualitative interviews, with six seasoned New Zealand outdoor educators, whose years of service gave their voices a collective authority of experience.

### **THE 1953 EVENT**

Mt. Egmont/Taranaki is a conical volcano on the Western edge of the North Island of New Zealand. In 1953, within the space of a week, eight lives were lost on Mt. Egmont/Taranaki in two separate incidents. The first occurred on Sunday the 26<sup>th</sup> July, when the Nurses Tramping Club undertook a winter ascent of Mt Egmont/Taranaki, assisted, organised, and led by the Taranaki Alpine Club. Split into smaller groups, the expedition started late and the climbers were poorly equipped with inadequate mountaineering tools. The weather changed for the worse after the groups had summited; descending in a storm, roped together on icy terrain, one group slipped and plunged over a bluff. Six people died. The second incident occurred on Sunday 2<sup>nd</sup> August, when two climbers fell from high on the mountain and were killed. For the purposes of this research, these two incidents made up the 1953 Event.

### **The 1953 Event: pre-conditions and discourses.**

There are multiple discourses revealed in the reporting of the two accidents in the 1953 Event. The newspaper articles reflect a conservative tone that later historians like Barbour (1989) and King (2003), suggest reflected a desire for order in a post-World War Two world. Concurrent with the reporting of the 1953 Event and the subsequent analysis, there was a lionisation of the exploits of Hillary and the ascent of Mt Everest. This offers an insight into the high value New Zealand society of the time placed on adventure and risk, and what was considered normal practice in the outdoors.

The discourse reveals that the role of women in New Zealand had been undergoing a steady transformation prior to World War Two, and outdoor activities like tramping and mountaineering had been increasingly seen as a means to redefine what women could do. The war itself had reshaped society and allowed women roles that traditionally had fallen to men, like engineering and farm work. Post-World War Two society, in general, appeared to reverse the gains of equality that women had made, but tramping and mountaineering, retained their egalitarian appeal, in that women, like men, could be vigorously athletic, risk takers and decision makers. These were the pre-conditions to the 1953 Event.

Most significantly, in light of the 2008 Event, the discourse of the 1953 Event reveals how the knowledge and skills of outdoor practice were passed on, and who could pass it on. An 'apprenticeship model', whereby those more-experienced practitioners induct the lesser-experienced trainees, is revealed as the dominant model of outdoor practice. This model was promulgated by the discourse of experience and judgment, with its emphasis on time in the field and mentoring; the discourse of rules with its emphasis on a 'right way' to do things; the discourse of education, whereby sharing knowledge is the way to prevent future incidents from occurring; and the discourse of the responsibilities of the leader, whereby leaders have a duty not only to care for the people in their group but also to uphold the wider cause implicit in the pursuit.

Moreover, in the wake of the multiple fatalities in the 1953 Event, the response of the government and the outdoor representatives in calling for more education and resisting the imposition of more regulation, contrasts with what unfolded after the 2008 tragedy.

Outdoor clubs of the 1950s were more than just the medium for like-minded people to come together and have leisure experiences in the outdoors. They represented a 'pushing at the boundaries' of gender and class interactions, a format where people could unshackle themselves from a pervasively conformist society. Most significantly, however, clubs were the primary vehicles for the transfer of knowledge in the outdoors: for those starting out, experience was accrued via club trips; for those desiring leadership, clubs offered the structure (see for example, Lynch, 1998; Ross, 2008). Clubs provided an apprenticeship model, whereby those with more experience mentored inexperienced practitioners. Clubs were the repositories of knowledge about practice. They were also the gatekeepers of that knowledge and, as such, held power over who had access to knowledge, and how that knowledge was passed on. Clubs then, were where the practitioners were trained. The situation was very different in the 2008 Event.

### **The 1953 Event: the language of experience and judgement**

The language used in the 1953 discourses contained words like judgement, experience, inexperience, young, senior, trust. These words suggest four components of the practice of that era, firstly, 'time in the field':

...[the accidents] might have been prevented by the exercise of good judgement...Many people in Taranaki could climb the mountain safely in winter without accident because they were experienced and obeyed the recognized mountaineering practices ("Warnings will not stop mountaineering", 1953; "Precautions", 1953)

Secondly, an emphasis on a partnership, whereby more experienced people teach lesser-experienced people:

Inexperienced climbers should not at any time try the ascent...If, for instance, two inexperienced men wanted to climb they should get the help of two experienced men...("Beware of Egmont's Icy Slopes", 1953)

Third, there would be a gradual succession of leadership, based on those two components: "Leadership is developed not only by taking responsibility but by seeking responsibility" ("Climbing Curbs Would Destroy Sport", 1953); and "...[t]his accident resulted largely from failure to adhere to rules of safe climbing which are applicable generally and which are taught by mountain clubs to their members personally and in their instruction books" ("Safety Rules Not Followed", 1953).

And lastly, the responsibility for practice clearly belongs to the person in charge of the group: "Yet his was the final responsibility for setting out...(New Zealand Alpine Journal, 1954).

### **THE 2008 EVENT**

A dry period of weather had ended and rain began falling in the Mangatepopo catchment on the 14<sup>th</sup> April and continued into the 15<sup>th</sup>. Around midday, after doing other activities based around the centre, and after a conversation with the field manager, an OPC instructor led 10 students and their teacher on a trip up into the lower gorge of the Mangatepopo Stream. When the group started the trip the stream level was low and clear. The group turned around at the halfway mark, due to diminishing light levels in the gorge, and increased anxiety levels in the group.

By the time the group neared the exit of the gorge the water was brown and rising. At approximately 2.30pm, in gathering darkness, the group took refuge on a ledge approximately 135 metres upstream from a dam/intake structure. By 4pm, with water lapping around them, the instructor had decided the best option was to swim out. One by one or in pairs the group entered the water at intervals and were swept downstream. The instructor was successful with one rescue. The rest of the group were washed over the dam. Only two survived.

### **The 2008 Event: pre-conditions and discourses.**

What emerged from the analysis of the 2008 Event was the predominance of a compartmentalised, systematic approach to knowledge acquisition and management of outdoor practice. This approach incorporates pre-employment training courses, workplace policies and standard operating procedures, as well as checklists of ‘competencies’ for new employees. By 2008, this approach was normal in that it had been championed for nearly two decades as the best way to train people, partly as a result of the waning of the role of clubs as training vehicles for outdoor practitioners (see for example, Haddock, 1993; Hogan, 2002, Chisholm & Shaw, 2004) and perhaps partly because of what Crotty (1998) calls the reification of meaning, whereby ‘the way things are’ is the accepted truth and passed on as such, becoming the “tyranny of the familiar” (p. 59). In the reporting of the cause of the tragedy, however, people failing to follow the systems was offered as a primary cause of the failure (Devonport, 2010).

This compartmentalised, systematic approach is a hallmark of neo-liberalism, an ideology with roots in the writings of the 1960s economist Milton Friedman. It has other names—such as market-liberalism, ‘New Right’, and economic rationalism. This ideology is focused on social and economic efficiency and “the primacy of the individual” (James, 1992, p. 86). It encourages minimalist government and open-market policies. One of its assumptions is that the open market will provide competition and result in efficiency and choice for consumers (Dumble, 2003). What this translates to is an emphasis on managerialism—that risk could be managed by systems and outsourcing, that people could be held accountable for performance and budgets via a systematic paper trail, and that individuals were more important than communities. When the Labour government swept to power in New Zealand in 1984, neo-liberalism was the philosophy behind, and excuse for, major social change (Kelsey, 1997; Sharp, 2005).

Dumble defines managerialism as “an obsession with audited quality...efficiency...and policy” (2003, p.8). It requires rigid lines of accountability of actions, through reports, cost accounting, and a clear delineation of roles. It results in an emphasis on avoiding liability, rather than ensuring responsible decision-making through experience-based judgement. With this approach, the economic costs and benefits of decisions outweigh any social gain. There may be risks in having an autocratic or dictatorial management system but it is more efficient than having a collaborative approach, as collaboration takes more time and therefore incurs a higher cost.

### **The 2008 Event: the language of managerialism**

Emanating from both the participants in the 2008 Event, and those critiquing it, we have the language of managerialism in the discourse. This has terms and phrases that signify blame: “Those who do not accept liability for their actions should have it sheeted home to them....we should consider whether people whose negligence costs lives...should not be personally answerable” (“Timely call for a new era”, 2009); and, “still hoping accountability would come” (“Dismay at decision”, 2009).

Phrases that signify a clear delineation of roles or emphasis on the individual: “My obligation was to my group (“Instructor tells canyoning inquest he regrets not acting”, 2010). Others that signify a compartmentalisation of

knowledge: “There weren’t many occasions where there was a sharing of concerns about such things as river flows or conditions on the mountain” (“Centre boss says system failures led to tragedy”, 2010); or that signify a hierarchical management structure with its inherent demarcations of power: “...high staff turnover, non-compliance with agreed organisational policy and an ‘autocratic, unfriendly and demotivating’ management dynamic” (“Reports queried OPC safety years before tragedy”, 2010).

## **WHAT THE INTERVIEWS REVEALED**

In the course of this research project, interviews were conducted with six very experienced outdoor educators. For the purpose of anonymity, the participants were given names of colours. The participants were asked to describe their own professional journeys, and in doing so, they revealed what the practice had been like in the past and what it was like in the present. The language exposed in the discourse of the 1953 Event—judgement, experience, mentoring, leadership responsibility—also emerged in the interviews:

Mr White: ...taking kids out of the classroom was not...it was done but it wasn’t done on a formalised basis. It was more an informal thing...

Mr Grey: You learned it by being there and being with someone else and those sorts of things. As I look back on it, we were very fortunate at times that we got away with stuff...We were learning on the hoof. There was a lot of that but also there was a lot of teaching each other...

Mr Yellow: We learned by doing...

I already had a lot of experience in the outdoors in tramping and hunting, so took over the HOD of outdoor education...

... The people who took the sailing or the people who took the tramping had a lot of on-the-job training. People who had some tramping experience but weren’t used to leading a group, would come with one of the other people and learn the route and learn the problems...

... Those sorts of things were always measured and thought about but not necessarily written down. It sort of got passed from one to the next that you needed to watch that hole or watch that such and such...

... If you didn’t have experience or anyone on the staff who was experienced in those kinds of things, you didn’t do them...

... Common sense. It’s the be-all and end-all of safety.

Ms Red: They had been taking this camp for years, so in that sense they were experienced and they had a big background in hunting and were familiar with the area...

... When I went in the early days it was part of my job...We had a camp handbook. We had a training day. They went through that and then they left us to get on with it...

Ms Blue: Young teachers were mentored by more experienced teachers. [This] included checking on our planning, talking with

the class, and accompanying the trip as a support person. The class organised their own food...

...Most of my training came [through] mentoring by others around me...Much of my training was informal and on the job.

I began to think of this type of language as 'traditional' in that it used words, phrases and descriptions of practice that were common before the rise of neo-liberalism. Thus the practice of the past was about experience, judgement and apprenticeship.

The practice of the present, according to the interview participants, was explained in different language. There are many references throughout the interviews to an increase in paperwork, the dominance of risk management, including policy, systems, and standards, and the increase in fear of blame. I came to think of this type of language as 'systems language' in that it felt very structural and compartmentalised:

Ms Blue: [NZOIA] set standards and set up an award scheme. They have a good system for assessing technical skills.

Ms Red: I think it was self-generating. More paper. More butt covering.

Mr Black: [Now I am] only working as a wage slave. I gave up when getting concessions and insurance became complicated and expensive...

Leaving [outdoor classes] to professional contractors...can be ok, but can just become another job delivered without any passion and with no long-term commitment to the students.

Mr White: [Paperwork is] pretty extensive...

Mr Grey: I think there is a lot more [paperwork]. It varies from place to place a bit, but for example the bulk of work which is still through the schools, there's a paper trail that has to get sorted through before you even get the chance to take a group outdoors...Commonly schools will want a RAMS<sup>2</sup> or some form of risk management documentation...

...the whole rise of the Occupation and Safety Health [legislation], that has had a big impact on the way society views safety management...

...somewhere in the mid 1980s, we started to see the growth of the course—OPC, the polytech courses etc...

To go back to the Elim guy, [it was like he was saying] "We ticked our boxes, so we avoided—it couldn't come back to us"...

Because of the nature of our work...we have interaction in nine conservancies and that is costing me \$6200...but it might be more. This is just to look at the paperwork, without any guarantee that we may actually be given a concession...

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<sup>2</sup> Risk Analysis Management System (Haddock, 1993).



Mr Yellow: Now, I think, it has gone from the sublime to the ridiculous in the paperwork...institutional knowledge [isn't] captured by RAMS [or] by policy.

Ms Red: It was unwieldy. It was frightening. You had to have a form for everything...

Ms Blue: Risk management has changed the planning process and set the safety planning to the side rather than having it integrated in the whole process.

## **DISCUSSION**

The language used in the discourses surrounding the two Events, is mirrored in the language used by the interview participants regarding their practice of the past and of the present. This is because their work history encompassed the change in approach. Their language is indicative of a change in how outdoor/adventure education was practiced and how it currently is practiced: from a 'traditional' mentoring/apprenticeship model, with an emphasis on experience, to a 'systems' model with an emphasis on audits, accountability, qualifications, policy, and risk management that is indicative of managerialism.

Also emerging from the interviews was the despair of older practitioners who were 'trained' in a pre-discontinuity era, but who are engaged in the complexity of the practice of the current era. Their comments both illuminated the changes and offered a way ahead:

That's the change in society, coming back to compliance and risk management: it does have an effect because in a sense you are literally forced from an economic point of view, to put people into the field in an earning capacity perhaps before they are truly ready...Everybody wants great risk management but nobody wants to pay for it. (Mr Grey)

The factor that makes people 'truly ready' for work in the field is experience. But experience alone is not enough, as the discourse from the 1953 Event reveals—there needs to be suitable training and systems. The 2008 Event highlighted a highly systematised organisational approach to practice, but this too was not enough to prevent a tragedy, as one of the parents who lost a child in the Mangatepopo, noted:

...revamped systems are not enough to guarantee safety. OPC already had good policies and a chief executive with a doctorate in risk management on the day Natasha died. You don't need policies, you need common sense... ("Facing the challenge", 2010)

The discourse around the two 'Events' suggested something about how outdoor/adventure education was practiced in 1953 and in 2008, in New Zealand. The interviews, while not quite reaching that far back in time, reiterated the same overarching themes—that practice in the past was an 'apprenticeship' model with little paperwork, and that practice in 2008 (and today) was dominated by 'systems' embodied in paperwork. The interviews were also able to allocate a 'point-in-time'—the mid to late 1980s—when the

model of the past was superseded by the model of the present. Neo-liberal policies, which came to the fore in New Zealand in the mid-1980s, were identified as one of the key drivers in the change in training and risk management practice in outdoor education.

The 2008 Event was dominated by managerialist discourse, which became common in New Zealand with the rapid introduction of neo-liberalism in the post-1984 era. A secondary discourse that emerged with the coroner's report and subsequent newspaper articles was the discourse of culture. The dysfunctional culture of OPC appeared to have had a part to play in the tragedy, but was largely ignored in the coroner's recommendations. However—and this is an important point—the culture of OPC perpetuated the compartmentalisation of training, and roles; and the compartmentalisation of training and roles influenced the culture via the power /knowledge dynamic.

## CONCLUSION

Learning from other people's mistakes is a key ingredient to furthering one's own experience. Comments from Hersey (2009) eloquently point out that having hindsight or abundant safeguards, is, however, no guarantee that people will learn:

That is the problem with hindsight. While we want to use it to learn from mistakes, we can also lose sight of the difficulty of decision making at times of stress. Looking back it is easy to see what went wrong, but at the time this is not always apparent...(p. 21)...and...over-vigilance doesn't necessarily translate into lesser risk (p. 157)

The 2008 Event was an unsettling experience for the New Zealand practitioners of outdoor/adventure education, as it raised doubts about the dominant approach to practice or its ability to produce practitioners who can make good judgement calls in the heat of the moment. Disconcertingly, OPC was representative of other organisations that also used (and continue to use) this approach.

This study suggests that what is needed in the future is less emphasis on systems and therefore less paperwork, in conjunction with a re-visiting of the amount of experience and the quality of those experiences needed in order for practitioners—especially new practitioners—to make quality judgements in the field. In addition, quality of experience would encompass some type of mentoring: perhaps activities deemed to be particularly hazardous, would only be run by new practitioners in conjunction with more experienced practitioners. What is needed for the future is a blending of the old system and the new, a swinging of the pendulum away from the extremes and towards the middle.

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