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TOOLKIT

PARTICIPANT CARE





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Participant Care Toolkit

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1. PURPOSE

This toolkit aims to establish procedures for ensuring the well-being and comfort of participants involved in adventure tourism products.

2. SCOPE

This toolkit aims to establish procedures for ensuring the well-being and comfort of participants involved in adventure tourism products.

3. OVERVIEW

This toolkit provides a framework for adventure product providers in South Africa to ensure the well-being and comfort of their participants. By implementing these procedures, providers can enhance participant satisfaction, maintain high safety standards, and promote a positive adventure tourism experience.

4. PARTICIPANT CARE PROCESS

What is a participant care process?

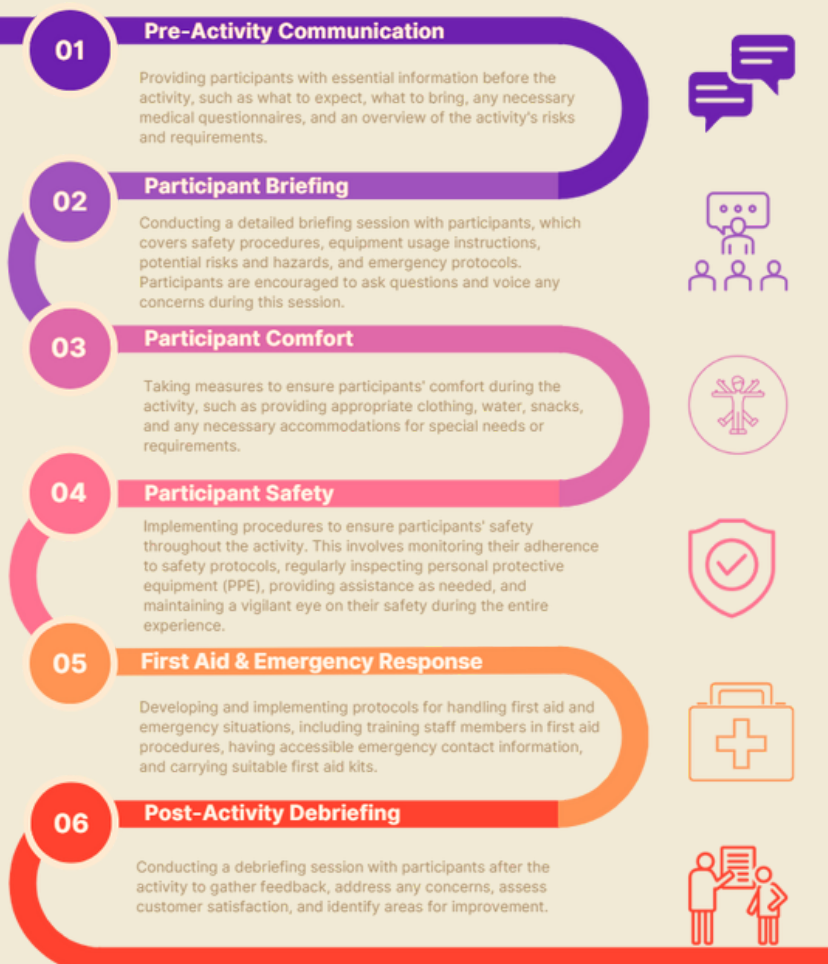
The participant care process refers to a systematic approach or set of procedures designed to ensure the well-being, safety, and comfort of individuals participating in a specific activity or program.

It involves taking proactive measures to:

- address participants' needs,
- provide necessary support,
- and mitigate any potential risks or challenges they may encounter during their engagement.

Why implement this process?

Implementing participant care is essential for creating a safe, enjoyable, and responsible experience for participants. It safeguards their well-being, enhances customer satisfaction, mitigates risks, and contributes to the reputation and sustainability of activity providers.



5. PARTICIPANT CARE PLAN

5.1 Pre-Trip Communication

- Send a pre-trip mailer to clients describing what to expect and what to pack for the trip.
- Include information about the activity, its potential risks, and any specific requirements.
- Provide a medical questionnaire to gather relevant health information from participants.
- Ask participants to provide religious or cultural expectations (e.g., single-sex bathrooms, bathing, food restrictions, prayer times, headwear) as well as expectations around separating genders or gender identities (LGBTQIA+) in the sleeping area?

- Actions/Requirements:

- Templated pre-trip mailer
- You can get health information directly from participants using your own health declaration form, or a client organisation (Tour Operator/Travel Agent) might present this information to you in a summary form, but this needs to be accurate and relevant. Client organisations must let you know about relevant health or behavioural concerns that might affect the safety of your operation if they know them. However, you should always ask for this information rather than assume that the organisation will pass it on to you

- Note

- The collection, storage, and distribution of confidential information in South Africa are regulated by the Protection of Personal Information Act, Act 4 of 2008 ('POPI' or 'POPIA').
- The General Data Protection Regulation (or GDPR) which was adopted by the European Parliament also came into effect in 2018 and is relevant when dealing with inbound participants.
- Personal information collected about participants may include but is not limited to:
 - Names
 - Addresses
 - Phone numbers
 - Email address
 - Medical details that might be relevant to the activity
 - Emergency contact details for next of kin/guardian
- SATSA has developed the Privacy Toolkit with the main objective to educate the industry on the importance of adhering to data protection laws. To access the toolkit as well as recordings and further information, please click [here](#).

5.2 Participant Briefing

- Conduct a participant briefing before starting any adventure tourism activity.
- Cover safety procedures, equipment use, and any potential risks or hazards.
- Explain emergency protocols and ensure participants understand them.
- Encourage participants to ask questions and voice any concerns.
- Assess medical conditions, participant skill or ability, and fitness levels

During the briefing, ensure the activities match the participants' abilities and need through:

Self-selection

- Let potential participants (and/or their guardians) know about the activity they are signing up for and its potential risks
- They can then decide whether they want to participate or not. This can be achieved by using an acknowledgement of risk form. It must note the specific risks so that participants and guardians are making informed consent – but bear in mind that it may not make much sense to someone who knows little about the activity
- Consider creating videos or photos to illustrate the activity for participants (and/or their guardians)

Clarifying participant health information

- What medical issues do the participants have that could affect their safe participation? E.g., Allergies.
- Are there issues that are made worse by the stress of participating in the activity? E.g., lack of sleep, fatigue, change in routine? How are these issues best managed?
- Are participants or their guardians sufficiently reliable to provide this information? Or do you need, for example, an allergy management plan or a doctor's medical certificate?
- What medications or additional resources (other than supervision) do participants need to take part safely? E.g., prescriptions, physical aids, helpers
- Don't forget to consider the health needs of any guardians, helpers, or supervisors.

• Actions/Requirements:

- Participant briefing procedure
- Safety procedures
- Emergency protocols

Sequencing activities to match the participants' characteristics and needs

- Sequencing is about setting challenges and choosing activities at an appropriate level for each participant. It involves progressively building on a participant's knowledge and skills

Identifying participant abilities & characteristics including:

- Ages?
- Gender and sexuality diversity?
- Language/ability to follow your instructions safely?
- Behavioural characteristics – compliant, non-compliant, mixed?
- Are participants (and their caregivers, if relevant) reliable and able to remember and follow basic safety instructions (e.g., what to do in the event of an emergency, site hazard information)?
- Are any participants likely to show dangerous non-compliant behaviour (e.g., drugs/alcohol abuse, physical violence, 'hooking up' if underage, wandering away from the site)?
- Fitness level
- Aquatic competency
- Experience with the activity
- Don't forget to assess the experience or capacity of any guardians or helpers who might be participating

5.3 Participant Comfort

- Conduct a participant briefing before starting any adventure tourism activity.
- Cover safety procedures, equipment use, and any potential risks or hazards.
- Explain emergency protocols and ensure participants understand them.
- Encourage participants to ask questions and voice any concerns.
- Assess medical conditions, participant skill or ability, and fitness levels.

- Actions/Requirements:

- Develop and implement procedures to ensure participants' comfort during adventure tourism activities
- Appropriate clothing, water, and snacks if needed

5.4 Participant Safety

- Ensure participants follow all safety procedures and use equipment properly.
- Regularly check personal protective equipment (PPE) such as life jackets, harnesses, and helmets for proper fit and adjustments. Bear in mind that participants might make adjustments to go to the bathroom or for comfort.
- Have staff members available to provide assistance as needed.
- Continuously monitor participants' safety during the activity, paying attention to signs of psychological stress (nervousness, panic, etc.), heat-related issues, dehydration, and fatigue, even if the participant is not aware of it themselves or is too shy/embarrassed to inform anyone.

- Actions/Requirements:

- Safety procedures with clearly defined safety protocols, including equipment use, safety checks and emergency response protocols

5.5 First Aid and Emergency Response

- Develop and implement procedures for providing first aid and emergency response in the event of an incident or accident.
- Train staff members in first aid and emergency response procedures.
- Ensure emergency contact information is readily available to staff members and participants.
- Carry a suitable first aid kit and complete incident report forms when necessary.

- Actions/Requirements:

- Procedures for providing prompt first aid and emergency response in case of incidents or accidents
- Train staff members in first aid and emergency response procedures, ensuring their readiness to handle emergencies
- Keep emergency contact information easily accessible to staff members and participants

5.6 Post-Activity Debriefing

- Conduct a post-activity debriefing with participants.
- Discuss participant satisfaction, feedback, and any concerns or issues that arose during the activity.
- Use this feedback to improve future experiences and address any areas of concern.
- Actions/Requirements:
 - Participant post-activity debriefing procedure
 - Template to collect feedback on participant satisfaction

6. IMPLEMENTATION & REVIEW

It is important to regularly test your preparedness to manage emergencies and to ensure participant comfort. Ensure that there is, at the very least, an annual emergency drill for all staff.

Use information from these drills and learnings from participant debriefing to review and update procedures and plans to align with best practices and adapt to specific activity requirements and participant needs.

7. CONTACT DETAILS

For more information on SATSA's Adventure Tourism Chapter and Self-regulation project, please visit www.satsa.com.

You are also welcome to make contact as follows:

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