

POLAR QUALIFICATION

Advanced Driving Endorsements

2020 Edition



DEFINITIONS:

- Scope:** Outlines who the certificate is for.
- Element:** Outlines the overall **skill set** to be taught.
- Range:** The **specific skills** to be taught.
-

SCOPE: Advanced Driving Endorsements are additional skill and knowledge sets for professionals and crew small boat/zodiac operators working in polar regions or more demanding conditions. These people are able to support some, or all, of the more demanding facets of ship and land based operations in polar and non-polar regions that use small boats/zodiacs. A driver seeking Endorsements will have fulfilled all requirements and pre-requisites for PQ – Working with Small Boats/Zodiacs and Driving Small Boats/Zodiacs.

- PREREQUISITES:**
- >10 excursions in the endorsement field (except #7 where the activity or training has to be undertaken once).
 - PQ Driving Small Boats/Zodiacs and all relevant pre-requisites involved.

CROSS CREDIT: Any internationally recognized qualifications that include components to the level of the Scope or higher. See Cross Credit Matrices.

Endorsement 1 – Polar Operations.

SCOPE:

The Polar Endorsement is for drivers operating in the polar regions and dealing with the particular environmental risks and wildlife sensitivity issues these places require. This endorsement is strongly encouraged for drivers who wish to operate small boats/zodiacs in the polar regions.

Special Notes: i. Drivers working regularly around glacier faces and ice fronts are encouraged to have a personal range finder or strategies to confirm exactly how far from these features they are.

PERFORMANCE CRITERIA:

1. Demonstrate ability and strategies for driving in brash ice.

Range: Understanding of risks, route selection, picking leads, appropriate speed, weight distribution, strategies for clearing ice from prop or under hull.

2. Demonstrate knowledge of set industry guidelines and situational strategies for small boat/zodiacs around/in environmental hazards.

Range: Ice bergs, glaciers, overhanging rock walls, glacier faces, fog, upwind of ice edges, waves generated by calvings.

3. Demonstrate knowledge of set industry guidelines and situational strategies for small boat/zodiacs around wildlife.

Range: Individual and group strategies for approaching and/or observing whales/bears/seals/birds.

4. Understands and able to assess sea/ice conditions against personal skills and the right of a driver to decline to be involved if they are not comfortable.

Endorsement 2 – Support a polar auxillary water activity (sea kayaking, SUP).

SCOPE: This endorsement is for guides/field-staff who run/support all aspects of an auxillary program. To gain the endorsement you must be tested in all the Elements.

PERFORMANCE CRITERIA:

- 1. A group is loaded from a small boat/zodiac into sea kayaks or other craft.**
Range: Positioned appropriate to conditions and skills, embarkation/disembarkation, procedure is explained, group is controlled, loading method.
- 2. Kayaks or other craft are transported on/by a small boat/zodiac.**
Range: Towing system used, carrying system used, understands limits of small boat/zodiac and risks involved, drives to weather/sea conditions.
- 3. The role of a small boat/zodiac in supporting a recreational craft excursion is explained.**
Range: Following/support distance is appropriate to conditions, any wildlife considerations and group skill, situational requirements discussed with group guide, ability to work on different radio channel.
- 4. Assist in a rescue and recovery of kayak and/or swimmer.**
Range: Safe approach, positioning of small boat/zodiac relative to wind/waves/victim, strategies for getting victim into small boat/zodiac.

Endorsement 3 – Drive small boat/zodiac safely in strong winds (>30kts).

SCOPE

This endorsement is designed for skilled and experienced drivers who can support an operation in strong or non standard operational wind conditions in polar or non polar waters.

PERFORMANCE CRITERIA:

1. Drive a route to and from shore.

Range: Winds up to but not exceeding 40kts, control of small boat/zodiac, choice of route dependent on waves/wind/swell, a range of driving stances, use of features to provide shelter.

2. Explain safety strategies for driving in strong winds.

Range: Communications with Bridge or EL, use of ballast, options of shelter and lee.

3. Slow speed manoeuvring in strong winds to a set point (no greater than 40cm either side).

Range: Able to hold a position and angle, can explain a 'ferry' angle to the wind, allows for wind slip at final approach.

Endorsement 4 – Surf zone operations.

SCOPE: This endorsement is for drivers/staff with skills and experience to land/leave a surf zone with/without passengers in polar or non polar waters.

PERFORMANCE CRITERIA:

- 1. Discuss concepts of good judgement with personal skills vs surf conditions..**
Range: Ability to read surf conditions, self assess, risk mitigation.
- 2. Discuss the advantages and disadvantages and driving procedure for surf landings.**
Range: Forward landings, stern landings.
- 3. Demonstrate a surf landing suitable for given conditions with controlled disembarkation of passengers.**
Range: Management of craft, controlled disembarkation, communication with passengers.
- 4. Demonstrate a surf exit for given conditions with controlled embarkation of passengers.**
Range: Management of craft throughout, controlled embarkation, communication with passengers and/or shore party.

Endorsement 5 – Crane operations.

SCOPE: This endorsement is for drivers who are involved with operations to unattach or attach small boats/zodiacs to a winch or crane hook on a vessel in standard operating sea and wind conditions.

PERFORMANCE CRITERIA:

- 1. Demonstrate checks for all sling attachment points, transom bolts and sling U bolts.**
Range: Visual check for wear and tear, manual test of bolt tightness and orientation, understands the system for reporting faults or hazards.
- 2. Demonstrates ability to drive to the crane hook and retrieve or attach a small boat/zodiac.**
Range: Decision about current and wind direction, preparation of straps, smooth approach, disengage gears, engage hook, attach control line, engine procedures, tiller raised, anchor stowed, paddles stowed, inflation valves turned if required.
- 3. Demonstrate the correct method for attaching the small boat/zodiac lifting sling to the hook and control line attachment.**
Range (there may be ship specific requirements not included in this Range): Straps untangled, straps clear of tiller arm, lifting hook attached.
- 4. Demonstrate ability to communicate with crane/winch operator via hand signals.**
Range: Stop, up, down.
- 5. Has a working knowledge of Company Handbook and any particular ship specific operations that may differ from the Scope and the rights of driving staff to not be involved in crane operations if they feel it is unsafe for any reason.**
Range: Ship specific Staff Handbook, maintenance issues communicated to appropriate person.

Endorsement 6 – Land a group on an ice floe or sea ice.

SCOPE: This endorsement is for experienced and skilled guides/drivers who land people/groups on ice floes or fast ice. It is expected that they have received mentorship and tuition on all contemporary management procedures and the skills required prior to assessment.

PERFORMANCE CRITERIA:

- 1. Explain theories of ice strength and ice condition relative to safety concerns for ice landings.**
- 2. Explain options and strategies for small boats/zodiacs to land on ice floes or sea ice.**
Range: Drive-on landings, pontoon landings.
- 3. Demonstrate an ice floe or sea ice landing for given conditions and/or vessel.**
Range: Correct strategy for conditions and vessel, communication with passengers, controlled disembarkation and embarkation, management of excursion area, rescue equipment within easy reach.
- 4. Understands rescue strategies and carries rescue items for a possible 'breakthrough' or fall from ice edge and demonstrates their uses.**
Range: Throw line, paddle, ice-axe, ice probe.

Endorsement 7 – Rescue driving.

SCOPE: This endorsement is for experienced drivers/guides who have **undertaken operations or training on how to load/drive stretcher and patient or patients with limb injuries that require special management and the situational management decisions that go with these transports in given conditions.**

PERFORMANCE CRITERIA:

- 1. Load a stretcher/patient into a small boat/zodiac.**
Range: Correct placement of small boat/zodiac, communication with stretcher/patient bearers, stretcher/patient correctly oriented in the small boat/zodiac for the specific injury, PFD issues are considered and addressed.
- 2. Deliver stretcher/patient to vessel or designated site.**
Range: Communication with ship/shore team, drives to conditions for patient comfort, explains strategies to stretcher party for unloading.

DATE:	REVIEWERS:
2010	Prepared by Graham Charles (for Quark and OOE)
2015	Graham Charles
2/3/2016	Graham Charles
3/9/2016	Staff of Vavilov OOE – many alts
5/12/2016	PTGA Board, Doug Gould <i>et al.</i>
8/05/2017	Graham Charles editions
9/8/2017	Graham Charles editions Flipped Small boat/zodiac and wildlife approaches
10/9/2017	Graham Charles split into Polar Endorsement and small boat zodiac ops
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
26/3/2020	Qualifications Review Meeting

POLAR QUALIFICATION

Communications for Polar Operations

2020 Edition



**POLAR
TOURISM**
Guides Association
guiding guiding

DEFINITIONS:

- Scope:** Outlines who the test is for.
- Element:** Outlines the overall **skill set** to be tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.
-

SCOPE: Radio Operations is aimed at all field staff/operators working in polar regions shore-based or ship-based. It is a basic safety management competency that all field staff should have.

- Special Notes:*
- i. *It is the Assessor's responsibility to specify prior to an assessment which radio/s and frequencies are to be tested.*
 - ii. *Different organizations will have different protocols and use of international standards..*

PREREQUISITES: Nil

CROSS CREDIT: Any internationally recognized qualifications that include these components to the level of the Scope or higher. See Cross Credit Matrices.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Use, maintain and understand communication protocols with a VHF or UHF radio.

- 1.1 Understand the advantages and limitations of VHF or UHF communications systems.**
Range: Environmental conditions, geography, technology.
- 1.2 Use the control features of a given radio.**
Range: Turn radio on/off, use squelch, lock and unlock channel features, change channel, change power, PTT button.
- 1.3 Radio care.**
Range: Charging, cleaning, disassemble aerial, remove battery and check contacts for corrosion, display method/s of hands free carry.
- 1.4 Messages are sent and received using radio protocol as required by the organisation.**
Range: Speaks clearly, releases talk button after speaking, international radio protocol, phonetic alphabet able to be used and understood.
- 1.5 Messages are communicated or relayed under difficult conditions.**
Range: Understands range and function relative to distance and obstacles, poor radio reception or difficult environmental conditions.

Element 2 – Use a satellite telephone.

- 2.1 Demonstrate an understanding of the range and limitations of a satellite telephone for your given location.**
Range: Understands how a satellite telephone works, the range and function relative to curvature of the earth and geography, temperature and operating strategies.
- 2.2 Demonstrate a call to a given number.**
Range: Antennae oriented, correct key protocol and country number of home office, finishing, powering off.
- 2.3 Demonstrate satellite telephone problem solving.**
Range: Battery power, check and remove battery, antennae connections, service strength.

Bridge Radio Endorsement

Range: As per 1.1, 1.2, 1.4 with a Bridge Radio.

Mobile Base Station Endorsement

Range: As per 1.1, 1.2, 1.3, 1.4 with a Mobile Base Station.

DATE	REVIEWERS
2016	Prepared by Graham Charles
1/4/2017	Industry personnel
8/5/2017	Graham Charles, Alex McNeil
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
26/3/20	Qualifications Review Meeting

Crevasse Awareness & Management

2020 Edition

DEFINITIONS:

- Scope:** Outlines who the certificate is for.
- Element:** Outlines the overall **skill set** to be taught.
- Range:** The **specific skills** to be taught.
-

SCOPE

This preventative management and awareness course is for all staff involved in land and shore excursions where **snow/ice glide cracks, bergschrunds and crevasses** (all defined simply as 'crevasses') are known hazards at specific sites. It is a general education, hazard awareness, disclosure and crowd control skills awareness course and intended only for known site specific hazards and for people working under a suitably experienced or qualified guide/staff member. It is intended as an awareness program only.

- Special Notes:*
- i. *It is currently beyond the scope of the PTGA to train and qualify people for the skills and experience required to access these features, make judgements regarding their suitability for guided use or to perform a complex rescue in crevassed terrain. There are many international qualifications that train and examine people to this level. Companies should hire personnel with suitable external qualifications.*
 - ii. *Organisations that train, examine and qualify people to travel/rescue in crevassed terrain include any qualifications program that has a publicly available syllabus and performance examines candidates in crevasse travel and crevasse rescue.*
 - iii. *The PTGA differentiates between mountain/glacial terrain where the location and extent of crevasses is unknown and unknowable, and site specific bergschrunds and crevasses which are **known** to exist in the same place from year to year and whose parameters (depth, width and structure) are understood by qualified or experienced guides and deemed to be manageable..*

- iv. *The PTGA expects that anyone whose role includes site assessment, judgement and decision making for excursions that are known to have bergschrunds or crevasses should have higher levels of experience or qualifications and should carry appropriate equipment and know how to use it..*
- v. *Element 2 extraction does not imply someone has 'fallen' in a crack. It is extraction awareness for someone who may have put their leg through and are unable to extract themselves.*

PREREQUISITES: Nil

CROSS CREDIT: Any internationally recognized qualifications that include these components to the level of the Scope or higher. See Cross Credit Matrices.

TEACHING ELEMENTS AND LEARNING POINTS:

Element 1 – How to identify and manage known features.

1.1 Explain glacial, snow field and sea-ice processes and features and identify common hazards with them:

Range: Crevasses, bergschrunds, glide cracks and tide cracks including cracks in near-shore snow influenced by tides and/or sea ice, changes in risk with time of the season.

1.2 Explain techniques and any personal safety options used for safely locating and marking known cracks, tide cracks, bergschrunds and crevasses.

Range: Self-protection, GPS waypoints, probing, kicking, external information.

1.3 Describe situational management techniques for marking hazards, managing and disclosing risk.

Range: Clearing a visible safe zone, disclosure to clients, wands and flags, management and appropriate use of personnel, decide to not use the area.

Element 2 – How to safely extract someone from a known feature without technical equipment.

2.1 Demonstrate how to secure the site.

Range: Stops all movement in the area, establish safe movement area and retreat path, establish/creates safe area and solid ground to assist an extraction.

2.2 Demonstrate how to perform a non-technical extraction.

Range: Safe lifting options using other people, equipment and clothing, disclosure of action, non-injurious to the victim, improvised harness options to assist the lift, checking condition on extraction and transport to landing zone or other safe zone, marks the site to share with other operators.

DATE:	REVIEWERS:
2017	Prepared by Graham Charles
8/5/2017	Graham Charles, Cam Walker, Phil Wickens, Keith Riley
22/5/2017	Graham Charles
9/6/2017	Harry Keys
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
27/3/2020	Qualifications Review Meeting

POLAR QUALIFICATION

Driving Small Boats/Zodiacs

2020 Edition



**POLAR
TOURISM**
Guides Association

guiding guiding



DEFINITIONS:

- Scope:** Outlines who the test is for.
- Element:** Outlines the overall **skill set** to be tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE: This award is for personnel driving small boat/zodiacs to support a land or ship based operation.

- Special Notes:*
- i. *This PQ is considered the operational level required to be able to drive small boat/zodiacs with and without passengers in moderate conditions not more than 3nm offshore or from an attending vessel.*
 - ii. *A small boat/zodiac is an inflatable or hardshell vessel 7m or less with an outboard motor/s that may be driven by a tiller or center console.*
 - iii. *This award is a valuable and viable assessment and qualification for crew and shipping company staff driving small boat/zodiacs as part of their job in any region.*
 - iv. *The Polar Endorsement (see Advanced Endorsements) is strongly encouraged for any staff working in polar regions.*
 - v. *This award does not dictate whether the small boat/zodiac is a pull start or electric start.*
 - vi. *The PTGA encourages all guides driving small boats/zodiacs to have a personal throw bag and know how to use it.*

- PREREQUISITES:**
- PQ Working with Small Boats/Zodiacs.
 - >15 logged excursions as sole charge driver.
 - Current First Aid Certificate.
 - PQ Communications for Polar Operations.
 - PQ Navigation Skills for Polar Operations.

CROSS CREDIT: Any internationally recognized qualifications that include components to the level of the Scope or higher. See Cross Credit Matrices.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Personally prepare for driving operations.

1.1 Demonstrates personal preparedness and professional presentation.

Range: Suitable attire for conditions, personal clothing and equipment maintained and organized, type of PFD chosen for its uses and limitations (understands the reasons for/options to wear waders or a dry suit), radio suitably protected and attached, spare crucial clothing items for self or passengers, knowledge of expected conditions and operating locations, navigation device or strategy, sunscreen.

Element 2 – Prepare and check a small boat/zodiac for driving operations.

2.1 Demonstrate ability to pre-check the zodiac/small boat and start engine.

Range: Zodiac safety equipment, check inflation valves set to navigation, air vent on fuel tank open, pump fuel, check kill cord attached and spare available, adjust throttle, water running through cooling system, battery connections, idles engine until warmed up, check for bow or other lines in the water.

2.2 Demonstrate ability to lower engine, use and check for engine locking mechanism.

Range: Engine specific.

Element 3 – Drive a small boat/zodiac for basic operations transporting passengers to shore, ship or to cruise.

3.1 Demonstrate efficient management of self and passengers while operating a small boat/zodiac.

Range: Physical and verbal control of any passengers during activities and transition zones (a transition zone is any time or activity where people are moving from one state to another and coming into, or leaving a drivers control), ability to communicate effectively with passengers, ability to understand passenger requests or questions.

3.2 Demonstrate safe driving manoeuvres in a range of conditions.

Range: Attach kill cord, engage forward and reverse gears, smooth use of throttle, driving positions standing and seated, forward turning left and right, reversing left and right, ability to use gears and steering to spin the small boat/zodiac in tight area (<double boat length), ability to hold small boat/zodiac in position with wind and/or current, ability and confidence to drive small boat/zodiac on the plane with and without passengers.

3.3 Demonstrate MOB briefing and rescue procedures.

Range: Briefing, rescue of a person, use of throw bag, use of assistance stirrup or ladder, self rescue.

- 3.4 Demonstrate ability to drive a small boat/zodiac to a landing and have strategies for different water depths and types of approach.**
Range: Asking for prior information, correct speed for conditions, shallow drive, disengage gear, stop engine, lift engine.
- 3.5 Demonstrate ability to push off from a landing and drive away.**
Range: Push off and get in small boat/zodiac, controlled lowering of engine, start engine, reverse away, turn and drive away.
- 3.6 Demonstrate ability to approach a gangway/platform/pier and load/unload passengers.**
Range: Communicate with ship, check for current, wind or thruster influence, not 'wake' other small boat/zodiacs or self, controlled approach, safe docking and line attachment, tiller raised and clear of people, communication about requirements to passengers, system for checking PFD compliance, controlled loading or unloading of passengers, detachment of lines, drive away.
- 3.7 Demonstrate ability to transfer passengers safely to another small boat/zodiac on the water.**
Range: Positioning, methods of connection, communication of procedure to passengers.
- 3.8 Demonstrate knowledge of strategies for driving safely alone or in pairs when distant from ship, shore or in limited visibility.**
Range: Driving in pairs, regular radio contact, line of sight, use of GPS map or other mapping applications, use of wind/wave direction.

Element 4 – Anchor, attach a small boat/zodiac to shore, ship or other small boat/zodiac safely and efficiently.

- 4.1 Demonstrate strategies and/or theory of anchoring, tying or clipping a small boat/zodiac.**
Range: Using anchor, strategies for anchoring, clipping to another boat, engine up, paddle twist in hand lines, tying around a fixed object onshore.
- 4.2 Demonstrate knots for small boat/zodiac use.**
Range: Bowline, round turn and two half hitches, double half hitch on bight, clove hitch.

Element 5 – Towing or being towed.

- 5.1 Demonstrate strategies and theory for towing (or being towed) another small boat/zodiac or vessel.**
Range: Approaching vessel, three different methods of attaching and advantages and limitations of each, alongside vs behind, short distance vs long distance.

Element 6 – Solve basic issues with engine to ensure safety and time efficiency.

6.1 Demonstrate ability to problem solve basic engine problems.

Range: Disconnected fuel line, kill cord unattached, battery connections checked, fuel tank ran dry.

6.2 Demonstrate ability to deal with pontoon puncture.

Range: Explains strategies to transfer air around pontoons and reasons why you would and would not do it.

Element 7 – Have knowledge of how to right a flipped small boat/zodiac.

7.1 Access resources (YouTube, Manuals, experienced staff, Courses) and have knowledge about the method and risks associated with righting a capsized small boat/zodiac.

Element 8 – Demonstrate knowledge of Regulations and Legal Requirements for Operators of Zodiacs/Small Boats.

Range: Relevant to local area, COLREGS, navigation leads, channel bouys, operating in harbors and jetties.

Advanced Driving Endorsements

SCOPE: Advanced Driving Endorsements are additional skill and knowledge sets for professionals and crew small boat/zodiac operators working in polar regions or more demanding conditions. These people are able to support some, or all, of the more demanding facets of ship and land based operations in polar and non-polar regions that use small boats/zodiacs. A driver seeking Endorsements will have fulfilled all requirements and pre-requisites for PQ – Working with Small Boats/Zodiacs and Driving Small Boats/Zodiacs.

PREREQUISITES:

- >10 excursions in the endorsement field (except #7 where the activity or training has to be undertaken once).
- PQ Driving Small Boats/Zodiacs and all relevant pre-requisites for this award.

CROSS CREDIT: Any internationally recognized qualifications that include components to the level of the Scope or higher. See Cross Credit Matrices.

Endorsement 1 – Polar Operations.

SCOPE:

The Polar Endorsement is for drivers operating in the polar regions and dealing with the particular environmental risks and wildlife sensitivity issues these places require. This endorsement is strongly encouraged for drivers who wish to operate small boats/zodiacs in the polar regions.

Special Notes: i. Drivers working regularly around glacier faces and ice fronts are encouraged to have a personal range finder or strategies to confirm exactly how far from these features they are.

PERFORMANCE CRITERIA:

1. Demonstrate ability and strategies for driving in brash ice.

Range: Understanding of risks, route selection, picking leads, appropriate speed, weight distribution, strategies for clearing ice from prop or under hull.

2. Demonstrate knowledge of set industry guidelines and situational strategies for small boat/zodiacs around/in environmental hazards.

Range: Ice bergs, glaciers, overhanging rock walls, glacier faces, fog, upwind of ice edges, waves generated by calvings.

3. Demonstrate knowledge of set industry guidelines and situational strategies for small boat/zodiacs around wildlife.

Range: Individual and group strategies for approaching and/or observing whales/bears/seals/birds.

4. Understands and able to assess sea/ice conditions against personal skills and the right of a driver to decline to be involved if they are not comfortable.

Endorsement 2 – Support a polar auxillary water activity (sea kayaking, SUP).

SCOPE: This endorsement is for guides/field-staff who run/support all aspects of an auxillary program. To gain the endorsement you must be tested in all the Elements.

PERFORMANCE CRITERIA:

- 1. A group is loaded from a small boat/zodiac into sea kayaks or other craft.**
Range: Positioned appropriate to conditions and skills, embarkation/disembarkation, procedure is explained, group is controlled, loading method.
- 2. Kayaks or other craft are transported on/by a small boat/zodiac.**
Range: Towing system used, carrying system used, understands limits of small boat/zodiac and risks involved, drives to weather/sea conditions.
- 3. The role of a small boat/zodiac in supporting a recreational craft excursion is explained.**
Range: Following/support distance is appropriate to conditions, any wildlife considerations and group skill, situational requirements discussed with group guide, ability to work on different radio channel.
- 4. Assist in a rescue and recovery of kayak and/or swimmer.**
Range: Safe approach, positioning of small boat/zodiac relative to wind/waves/victim, strategies for getting victim into small boat/zodiac.

Endorsement 3 – Drive small boat/zodiac safely in strong winds (>30kts).

SCOPE

This endorsement is designed for skilled and experienced drivers who can support an operation in strong or non standard operational wind conditions in polar or non polar waters.

PERFORMANCE CRITERIA:

1. Drive a route to and from shore.

Range: Winds up to but not exceeding 40kts, control of small boat/zodiac, choice of route dependent on waves/wind/swell, a range of driving stances, use of features to provide shelter.

2. Explain safety strategies for driving in strong winds.

Range: Communications with Bridge or EL, use of ballast, options of shelter and lee.

3. Slow speed manoeuvring in strong winds to a set point (no greater than 40cm either side).

Range: Able to hold a position and angle, can explain a 'ferry' angle to the wind, allows for wind slip at final approach.

Endorsement 4 – Surf zone operations.

SCOPE: This endorsement is for drivers/staff with skills and experience to land/leave a surf zone with/without passengers in polar or non polar waters.

PERFORMANCE CRITERIA:

- 1. Discuss concepts of good judgement with personal skills vs surf conditions..**
Range: Ability to read surf conditions, self assess, risk mitigation.
- 2. Discuss the advantages and disadvantages and driving procedure for surf landings.**
Range: Forward landings, stern landings.
- 3. Demonstrate a surf landing suitable for given conditions with controlled disembarkation of passengers.**
Range: Management of craft, controlled disembarkation, communication with passengers.
- 4. Demonstrate a surf exit for given conditions with controlled embarkation of passengers.**
Range: Management of craft throughout, controlled embarkation, communication with passengers and/or shore party.

Endorsement 5 – Crane operations.

SCOPE: This endorsement is for drivers who are involved with operations to unattach or attach small boats/zodiacs to a winch or crane hook on a vessel in standard operating sea and wind conditions.

PERFORMANCE CRITERIA:

- 1. Demonstrate checks for all sling attachment points, transom bolts and sling U bolts.**
Range: Visual check for wear and tear, manual test of bolt tightness and orientation, understands the system for reporting faults or hazards.
- 2. Demonstrates ability to drive to the crane hook and retrieve or attach a small boat/zodiac.**
Range: Decision about current and wind direction, preparation of straps, smooth approach, disengage gears, engage hook, attach control line, engine procedures, tiller raised, anchor stowed, paddles stowed, inflation valves turned if required.
- 3. Demonstrate the correct method for attaching the small boat/zodiac lifting sling to the hook and control line attachment.**
Range (there may be ship specific requirements not included in this Range): Straps untangled, straps clear of tiller arm, lifting hook attached.
- 4. Demonstrate ability to communicate with crane/winch operator via hand signals.**
Range: Stop, up, down.
- 5. Has a working knowledge of Company Handbook and any particular ship specific operations that may differ from the Scope and the rights of driving staff to not be involved in crane operations if they feel it is unsafe for any reason.**
Range: Ship specific Staff Handbook, maintenance issues communicated to appropriate person.

Endorsement 6 – Land a group on an ice floe or sea ice.

SCOPE:

This endorsement is for experienced and skilled guides/drivers who land people/groups on ice floes or fast ice. It is expected that they have received mentorship and tuition on all contemporary management procedures and the skills required prior to assessment.

PERFORMANCE CRITERIA:

- 1. Explain theories of ice strength and ice condition relative to safety concerns for ice landings.**
- 2. Explain options and strategies for small boats/zodiacs to land on ice floes or sea ice.**
Range: Drive-on landings, pontoon landings.
- 3. Demonstrate an ice floe or sea ice landing for given conditions and/or vessel.**
Range: Correct strategy for conditions and vessel, communication with passengers, controlled disembarkation and embarkation, management of excursion area, rescue equipment within easy reach.
- 4. Understands rescue strategies and carries rescue items for a possible 'breakthrough' or fall from ice edge and demonstrates their uses.**
Range: Throw line, paddle, ice-axe, ice probe.

Endorsement 7 – Rescue driving.

SCOPE: This endorsement is for experienced drivers/guides who have **undertaken operations or training on how to load/drive stretcher and patient or patients with limb injuries that require special management and the situational management decisions that go with these transports in given conditions.**

PERFORMANCE CRITERIA:

- 1. Load a stretcher/patient into a small boat/zodiac.**
Range: Correct placement of small boat/zodiac, communication with stretcher/patient bearers, stretcher/patient correctly oriented in the small boat/zodiac for the specific injury, PFD issues are considered and addressed.
- 2. Deliver stretcher/patient to vessel or designated site.**
Range: Communication with ship/shore team, drives to conditions for patient comfort, explains strategies to stretcher party for unloading.

DATE:	REVIEWERS:
2010	Prepared by Graham Charles (for Quark and OOE)
2015	Graham Charles
2/3/2016	Graham Charles
3/9/2016	Staff of Vavilov OOE – many alts
5/12/2016	PTGA Board, Doug Gould <i>et al.</i>
8/05/2017	Graham Charles editions
9/8/2017	Graham Charles editions Flipped Small boat/zodiac and wildlife approaches
10/9/2017	Graham Charles split into Polar Endorsement and small boat zodiac ops
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
26/3/2020	Qualifications Review Meeting

POLAR QUALIFICATION

Lead a Hike in Non-Technical Terrain

2020 Edition



**POLAR
TOURISM**
Guides Association

guiding guiding



DEFINITIONS:

- Scope:** Outlines who the test is for.
- Element:** Outlines the overall **skill set** to be tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE:

Lead a Hike in Non-Technical Terrain is for field staff/guides who may be in charge of leading polar hikes in terrain that may include, dry glacial areas, outwash plains, beach and sub tidal zones, mountains and passes. Such hikes shall not require the use of a rope or other alpine equipment in order to safely manage them. Hikes may include snow or ice travel but only where a fall will not result in an uncontrollable slide. It may include areas where known and manageable crevasses are present. The PTGA believes this is **minimum** requirement for longer hikes outside a landing zone or field camp area.

Prerequisites:

- Logged >20 group hikes (at least 5 must have been in the polar environment).
- Current First Aid Certificate.
- PQ Navigation Skills for Polar Operations.
- PQ Communications for Polar Operations.
- PQ Crevasse Awareness and Management.
- PQ Interpretation Skills for Polar Guides.

CROSS CREDIT:

Any internationally recognized qualifications that include these components to the level of the Scope or higher. See Cross Credit Matrices.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Plan & Prepare for a Hike

1.1 Deliver a written plan for a hike (hike duration >2hours) that is suitable for polar tourism.

(This is a paper exercise for assessment purposes only. It is aimed at testing planning concepts.)

Range: Aims, objectives and purpose of the trip, estimated distances and times, emergency and alternative routes, risk/hazard identification and management strategies, any consent or access issues, weather information, intentions, communications and emergency procedures.

1.2 Personally prepare for a hike.

Range: Suitable attire for the conditions, spare crucial clothing for self and clients, navigation device or strategy, knowledge of expected conditions on that particular route on that day, sunscreen, radio carried in a suitable manner, first aid kit suitable for the purpose and knowledge of client equipment and the ability to do basic repairs.

1.3 Demonstrate strategies to collect relevant local information.

Range: Real-time weather information for a given area, snow and/or avalanche conditions, crack and crevasse status, tide conditions, wildlife risks or sensitivity issues.

1.4 Brief clients on an intended hike (on a ship, beach or at a camp/base).

Range: Introduction, appropriate voice, language and body language, teaching/visual aids, demonstrations, learning moments, evaluation of learning, engaging clients in positive experience which encourages enthusiasm and interest.

Element 2 – Lead & Safely Manage a Group in a Given Polar Environment

2.1 Effective management of the group.

Range: Pacing, rest stops, disclosure and explanation of potential dangers, route selection with regards to geography and movement around wildlife, keeping the group together, a system for accounting for everyone, establishing rapport, use of a leadership style appropriate to the group and support staff accompanying, situational management of hazards and wildlife encounters.

2.2 Efficient and confident personal movement in a range of different polar terrain.

Range: Slippery rocks, snow, glacial white ice, mud, talus, tussock, rocky and broken ground.

2.3 Demonstrate the use of, and can describe the advantages and limitations of different methods of communication suitable for use on a polar environment hike.

Range: Radio, smartphone, GPS tracker, PLB, SAT phone, intentions form.

2.4 Demonstrate knowledge and theory of emergency shelters available for a given hike.

Range: Suitable for surviving a night in adverse weather conditions (wind and rain), group shelter or Bothy Bag, snow cave, wind wall.

2.5 Demonstrate and explain safe practices in and around polar waterways.

Range: Alpine streams open or snow covered, glacial streams and gutters, outwash plains, undercut ice edges on coastline.

2.6 Demonstrate knowledge of, and role model, accepted tour operator practices.

Range: IAATO/AECO site guidelines, local area rules and laws including access issues and protocols, Leave No Trace.

DATE	REVIEWERS
2016	Prepared by Graham Charles
3/12/2016	Graham Charles, <i>et al.</i>
16/10/2016	Graham Charles, <i>et al.</i>
1/4/2017	Graham Charles, Phil Wickens
8/5/2017	PTGA Board
10/10/2017	Graham Charles, Ewan Blyth
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
28/3/20	Qualifications Review Meeting

POLAR QUALIFICATION

Interpretation Skills for Polar Guides

2020 Edition



**POLAR
TOURISM**
Guides Association
guiding guiding

DEFINITIONS:

- Scope:** Outlines who the test is for.
- Element:** Outlines the overall **skill set** to be tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.
-

SCOPE: Interpretation Skills are a knowledge base and skill set all field staff/guides working in the polar regions should have.

PREREQUISITES: Nil

CROSS CREDIT: Any internationally recognized qualifications that include these components to the level of the Scope or higher. See Cross Credit Matrices.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Deliver/facilitate interpretive discussions

1.1 Pre-brief the discussion.

Range: Explains any safety issues about the walk or site, reviews/explains and role models minimal impact protocols, speaks clearly at appropriate speed, visitor comfort considered, provides information outlining what the walk/exploration will involve.

1.2 Deliver an interpretive discussion.

Range: Understands thematic interpretation and uses the TORE model, tailor's information to the specific audience, information is provided in a logical order, encourages use of a variety of senses, provides accurate and relevant information, uses stories and anecdotes, interactive questioning, uses gestures and body language, use of provocative statements.

1.3 Conclude an interpretive discussion.

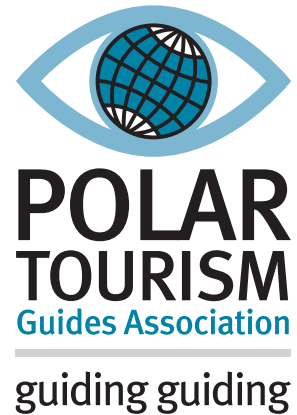
Range: Offers to find out information when answers are unknown, encourages audience to interact with each other, monitor groups departure or ongoing minimal impacts, ensure conclusion reinforces initial theme and main points.

DATE	REVIEWERS
2017	Prepared by Graham Charles
5/8/2017	Graham Charles, Sphie Ballagh, Mariano Curiel
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
13/3/20	Qualifications Review Meeting

POLAR QUALIFICATION

Lead a Dog Sled Journey

2020 Edition



DEFINITIONS:

- Scope:** Outlines who the Test is for.
- Element:** Outlines the overall **skill set** to be Tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the assessor if the assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE: Lead a Dog Sled Journey is for guides who may be in charge of leading dog sled journeys in terrain that may include, sea ice, established roads and trails, mountains and passes. It may include areas where sea ice cracks and crevasses are present. It is a **minimum** requirement for longer journeys outside a town or village.

- PREREQUISITES:**
- Logged experience >10 dog sledding trips.
 - PQ Communications for Polar Operations.
 - PQ Navigation Skills for Polar Operations and Advanced Terrestrial Navigation Endorsement.
 - PQ Interpretation Skills for Polar Guides.
 - Crevasse Awareness and Management.
 - Operations in Polar Bear Environments if operating in these environments.

CROSS CREDIT: Some Elements from PQ Lead a Hike in Non-Technical Terrain may be cross credited if a guide has that award and has been assessed. See Cross Credit Matrix for Elements common to the two awards.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Plan and Prepare for a Dog Sled Journey.

1.1 Deliver a written plan for a dog-sled journey (duration >2hours) that is suitable for polar tourism. (This is a paper exercise for assessment purposes only. It is aimed at testing planning concepts.)

Range: Aims, objectives and purpose of the trip, estimated distances and, times emergency and alternative routes, risk/hazard identification and management strategies, any consent or access issues, weather information, intentions, communications and emergency procedures.

1.2 Personally prepare for a dog-sled journey.

Range: Suitable attire for the conditions, spare crucial clothing for self and clients, navigation device or strategy, knowledge of expected conditions on that particular route on that day, sunscreen, radio or communications carried in a suitable manner, first aid kit suitable for the purpose.

1.3 Prepare sled for a sled journey.

Range: Knowledge of suitable set up with lines for the sled, spare tug & neck lines, spare dog harnesses, spare hooks, check sled condition and sled bag, check the brakes, make sure anchor(s) are secured correctly, appropriate equipment and maintenance supplies carried relative to the length of journey.

1.4 Prepare dogs for a sled journey.

Range: Consideration of which dogs run better together, ensure dogs are in a good state for running, demonstrate efficient and calm handling of the dogs, check collars and harnesses, harnessing the dogs, dogs out on sled lines in the advanced set up teams, consideration and knowledge of dog socks.

Element 2 – Lead and safely manage a group in a given polar environment.

2.1 Brief clients on an intended trip.

Range: Introduction, appropriate voice, language and body language, teaching/visual aids, demonstrations, learning moments, evaluation of learning, engaging clients in positive experience which encourages enthusiasm and interest.

2.2 Effective management of the dogs and sled.

Range: Commands, rest stops, assisting the dogs, sled handling and balance.

2.3 Effective management of the group.

Range: Rest stops, cold management, disclosure and explanation of potential dangers, route selection with regards to geography and movement around wildlife, keeping a group together, a system for accounting for everyone, establishing rapport, use of a leadership style appropriate to the group and support staff accompanying, situational management of hazards and wildlife encounters.

2.4 Efficient and confident personal movement in a range of dog sledding terrain.

Range: Soft snow, ice, trails, roads uphill and downhill travel in control.

2.5 Demonstrate the use of, and can describe the advantages and limitations of different methods of communication suitable for use on a dog sled journey.

Range: Radio, cellphone, GPS tracker, PLB and SAT phone, intentions form.

2.6 Demonstrate the use and/or construction of an emergency shelter.

Range: Suitable for surviving a night in adverse weather conditions (wind and rain), group shelter, snow cave, wind wall.

2.7 Demonstrate strategies to collect local condition information.

Range: Real-time weather information for a given area, snow and/or avalanche conditions, crack and crevasse status, tide conditions.

2.8 Demonstrate knowledge of, and role model, accepted tour operator practices.

Range: IAATO/AECO site guidelines, local area rules and laws including access issues and protocols, Leave No Trace.

DATE:
7/1/19
17/3/20

REVIEWERS:
Prepared by Rickard Berg
Qualification Review Meeting



**POLAR
TOURISM**
Guides Association

guiding guiding

POLAR QUALIFICATION

Lead a Polar Expedition

2020 Edition

DEFINITIONS:

- Scope:** Outlines who the Test is for.
- Element:** Outlines the overall **skill set** to be Tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE:

Lead a Polar Expedition is for experienced polar guides who may be in charge of leading multi-day expeditions (>14 days) in polar landscapes that may include, ice caps, glaciers and glacial neve areas, mountains and passes or on sea-ice. Skills, knowledge and experience with skiing and sled/pulk travel, extreme polar camping, weather forecasting, crevasse travel and rescue with sled/pulk, navigation and making route choices in potentially hazardous terrain are essential.

Special Notes: i The advanced first aid requirement for this PQ is any wilderness emergency care that is minimum 40 hour program.

ii This PQ does not test kite-skiing skills or the use of kites to assist travel.

iii Expeditions may involve snow or ice travel with skis, snow shoes or crampons.

PREREQUISITES:

- >30 days guiding to the level of the Scope.
- >80 personal days operating in Scope terrain.
- Current Wilderness First Responder award or equivalent.
- Crevasse Travel and Crevasse Rescue qualification.
- Polar Guide or Senior Polar Guide status.
- Terrestrial Navigation Endorsement.

CROSS CREDIT: Logged experience and endorsement, currency in any recognised international award scheme that covers material relevant to this award (IPGA, IFMGA etc).

METHOD: Candidates will participate in an oral interview examination about an expedition location of their choice (as per the Scope) with two qualified guides who will examine knowledge in the following elements. This may be in real time or on conference call.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Planning an expedition route.

Range: Aims, objectives and purpose of the trip, estimated distances and times, emergency and alternative routes, risk/hazard identification and management strategies, any consent, environmental, legal or access issues, information or consultation strategies, seasonal factors, feasibility, time vs resource management, intentions, communications and emergency procedures, biosecurity mitigation, flight sharing to minimize emissions, dealing with logistics operators and permits.

Element 2 – Expedition equipment.

2.1 Candidate can discuss a range of issues regarding expedition equipment.

Range: Appropriateness for route and conditions (sea ice, mountains, polar bears, extreme cold), equipment testing and knowledge, equipment repair capacity, knowledge of navigation equipment and strategies to navigate.

Element 3 – Expedition camping, food, cooking and sanitation.

3.1 Candidate can discuss campsite selection and construction issues.

Range: Drift, crevasses, wind, aircraft, wildlife, safety management strategies with any of these, camp construction in a blizzard.

3.2 Candidate can discuss food and cooking issues relevant to examination expedition.

Range: Tent cooking strategies, containment and storage, energy requirements (in calories or kilojoules) per person for your proposed conditions/duration/workload/gender, fuel capacity/burn rate to produce food and water, risks of CO₂ poisoning and procedures to respond, daily food intake strategies while mobile.

3.3 Candidate can discuss toileting and sanitation issues in extreme climates.

Range: Relevant environmental protocols, burial, containment and carry, Leave No Trace.

Element 4 – Expedition team and leadership.

4.1 Candidate can discuss strategies for pre-expedition participant information.

Range: Strategies and methods for evaluating participant capabilities, psychological capacity and emotional readiness for expedition, medical information and support role information, clothing and equipment check.

4.2 Candidate can discuss effective leadership skills and leadership strategies.

Range: Engaging clients in positive experience which encourages enthusiasm and interest, disclosure and explanation of potential dangers, appropriate voice, language and body language, teaching/visual aids, demonstrations, learning moments, evaluation of learning, strategies for keeping a group together in poor visibility, a system for accounting for people, establishing rapport, use of a leadership style appropriate to the group, situational management of hazards and wildlife encounters.

Element 5 – Environmental Impact Assessment and strategies.

Range: EIA process for the given area, rubbish and waste management strategies for examination area, knowledge of international laws governing relevant areas, permitting requirements for examination area, protocols for towns, bases or communities en-route in examination area.

Element 6 – Communications.

6.1 Can describe the advantages and limitations of different methods of communication suitable for examination expedition.

Range: Satellite telephone, tracking and/or emergency beacons, redundancy in communications.

6.2 Can discuss options for powering communication devices.

Range: Solar, wind, spare batteries.

Element 7 – Emergency and contingency planning.

Range: Emergency plan, emergency numbers, support team liaison, insurance contacts, adequate medical kit, use and/or construction of three types of emergency shelter. Demonstrate knowledge of crisis management strategies and priorities on a longer journey.

DATE:
13/7/18
13/3/20

REVIEWERS:
Prepared by Graham Charles
Qualifications Review Meeting

POLAR QUALIFICATION

Navigation Skills for Polar Operations

2020 Edition



**POLAR
TOURISM**
Guides Association
guiding guiding

DEFINITIONS:

- Scope:** Outlines who the test is for.
- Element:** Outlines the overall **skill set** to be tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.
-

- SCOPE:** **Navigation Skills** is for field staff/guides working in any area where known, or simple walks/longer treks, ski tours, skidoo excursions, landings or zodiac cruises are undertaken. It is a basic safety management competency that all field staff/guides should have.

- PREREQUISITES:** Nil

- CROSS CREDIT:** Any internationally recognized qualifications that include these components to the level of the Scope or higher. See Cross Credit Matrices.

Special Notes: Elements 1 and 2 are required to achieve the PQ.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Demonstrate knowledge of navigation tools.

1.1 Maps and/or charts are interpreted for information.

Range – Lat/long, distance units and measuring distance, water depths and small boat hazards, scale, datum information, contour lines, legend.

1.2 The use and limitations of navigation tools are explained.

Range: Map, chart, compass, GPS, smartphone, mud-map, wrist-watch.

1.3 Electronic navigation aids and systems are described in terms of their use and function.

Range: GPS, electronic charts, depth sounder, AIS.

Element 2 – Navigate in poor visibility.

2.1 Basic use of standard or digital handheld compass

Range: Take a bearing to a set point, follow a bearing in poor visibility, communicate bearing to others to use in grid or magnetic.

2.2 Use handheld GPS or Smartphone to problem solve and manage a location change.

Range: Check GPS settings for consistency with ship, create a waypoint, return to that waypoint in limited visibility, enter coordinates given to create a waypoint.

DATE	REVIEWERS
2015	Prepared by Graham Charles
8/5/2017	Graham Charles, Alex McNeil, Phil Wickens
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
26/3/20	Qualifications Review Meeting

POLAR QUALIFICATION

Operations in Polar Bear Environments (Tourism or Field Operations)

2020 Edition



**POLAR
TOURISM**
Guides Association
guiding guiding

DEFINITIONS:

- Scope:** Outlines who the Test is for.
- Element:** Outlines the overall **skill set** to be Tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE:

Operations in Polar Bear Environments (OPBE) is for all guides, field staff or personnel who guide or work with OPBE's individually or with groups of peers or clients. It is an awareness, behaviour and performance competency that any people operating in polar bear environments could use.

Special Notes: i *Firearm training may include: UNIS Safety Course, approved company firearms training programs.*

ii *Guides and field staff include: personnel from large polar tourism vessels or commercial and private yacht operations.*

iii *This award is useful and valid for other polar sector industries and activities such as scientists, sailors and hikers.*

PREREQUISITES:

- Current First Aid Certificate.
- Firearms license or an approved company/organization firearm training program that **MUST** include a statement of competency and performance with the relevant firearm, OR approved course in polar bear non-lethal deterrent options.
- PQ Communications for Polar Operations.

CROSS CREDIT:

Existing licenses or qualification/s, OR logged experience and endorsement that all criteria and elements are met. See RCC and Cross Credit Matrices.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Demonstrate knowledge of polar bears and their environment.

1.1 High Value Habitat (HVH) knowledge.

Range: Polar bear abundance knowledge, seasonal variation and risk factors, common HVH factors, HVH terrain traps.

1.2 Polar bear body language, behaviour and condition.

Range: Common body language, common approach and charging strategies, physical condition matrix, mothers with cubs, common polar bear behaviour heuristics.

1.3 Polar bear attack statistics knowledge.

Range: Statistics of polar bear attacks and review of causal factors.

Element 2 – Demonstrate knowledge of the advantages and disadvantages of commonly used lethal and non-lethal deterrent strategies.

2.1 Non-lethal deterrent strategy knowledge.

Range: Rubber bullets, flares, cap guns, screamers, pepper spray, improvised deterrents (i.e., banging rocks/pots etc., dropping clothes/gear during retreat), which actions/deterrents appropriate at different distances.

2.2 Firearm and shooting knowledge.

Range: Rifles, shotguns, handguns, appropriate shooting techniques/positions, specific targets on body, lines (imaginary) in terrain, implications of different clothing in shooting ability, safe and appropriate handling, appropriate briefing for clients.

Element 3 – Prepare for an excursion in polar bear environment.

3.1 Personal preparation.

Range: Pre-knowledge from any other operators' and/or locals about site/terrain suitability, local HVH factors known, knowledge of local laws and regulations for given location, safety equipment organised and accessible, communications checked and operational, scouting strategies (if possible), non-lethal deterrents prepared.

3.2 Firearm preparation (if applicable).

Range: Obtains correct firearm, performs standard safety checks, packages firearm for given conditions and ease of access, ensures correct ammunition and sufficient quantity.

Element 4 – Undertake an excursion in polar bear environment.

4.1 Individual excursion.

Range: Excursion intentions registered, continuous checking and scouting, movement strategies around/within terrain traps, use of warning indicators (shout, whistle, bell, noise-makers), firearm and/or deterrents checked, appropriately carried for the activity and efficiently accessible.

4.2 Group excursion.

Range: Excursion intentions registered, plan for avoiding conflict, continuous scanning, checking and scouting, movement strategies around/within terrain traps group management strategies communicated to everyone, pre-brief of behaviour in an encounter, use of warning indicator (shout, whistle, bell, other noise-makers), final safety checks of personnel and firearm and deterrents, appropriately carried for the activity and efficiently accessible.

Endorsement 1 – Advanced Operations in Polar Bear Environments – Large Group Management

SCOPE: This endorsement is for mass tourism expedition leaders or ground staff in charge of larger groups (more than two groups/two guides) with attendant staff/guides in polar bear environments. It is primarily a management and strategy qualification.

PREREQUISITES:

- PQ Operations in Polar Bear Environments.
- PQ Communications for Polar Operations.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Manage a large group excursion in polar bear environment.

1.1 Prepare a site for visitors.

Range: Pre-knowledge from any other operators' and/or locals about site suitability/risks, plan a site management strategy, plan a site clearance, outline any laws or regulations governing the site, brief staff of any HVH issues or traps, pre-landing scouting, execute site clearance and begin operations.

1.2 Demonstrate strategy for polar bear encounter and withdrawal.

Range: Theoretical exercise outlining an orderly departure from the site/bear and strategies to maintain process.

1.3 Demonstrate knowledge of an emergency response strategy.

Range: Laws and regulations in case of real incident, internal communications with the involved company or group, resolution phase strategies.

Endorsement 2 – Camping Operations

SCOPE: This endorsement is for guides, field staff or personnel who must camp or are in charge of groups camping in PBE's. This qualification is for land based operations and is outside the scope of larger mass/ship tourism operations.

- PREREQUISITES:**
- PQ Operations in Polar Bear Environments.
 - 5 nights logged camping/overnighting in polar bear environment .
 - PQ Communications for Polar Operations.
 - PQ Lead a Hike in Non-technical Terrain.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Manage a camping excursion in polar bear environment.

Range: Laws and regulations governing the activity for the given area, functional camp layout, camp utility access routes, bear safe containers, appropriate storage of food/hygiene articles.

Element 2 – Demonstrate knowledge of management strategies for overnight stays.

Range: Watch system, electric fences, trip wires, appropriate briefings for watchkeepers.

Element 3 – Demonstrate knowledge of HVH that might coincide with campsites.

Range: Known travel routes, water, noise, obvious sign, pre-existing camps, known carcasses, beaches, narrow valleys & passes.

DATE:	REVIEWERS:
2017	Prepared by Graham Charles
1/12/17	Rupert Krapp/Graham Charles
16/1/18	Rupert Krapp
23/12/18	Theres Horntrich
16/3/20	Qualification Review Meeting

POLAR QUALIFICATION

Presentation Skills for Polar Guides

2020 Edition



**POLAR
TOURISM**
Guides Association
guiding guiding

DEFINITIONS:

- Scope:** Outlines who the test is for.
- Element:** Outlines the overall **skill set** to be tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE

Presentation Skills PQ is aimed at any field staff/guides working in polar regions, who are required to give formal presentations. Basic competency in Presentation Skills will enhance a presentation experience.

- Special Notes:*
- i. This PQ can be assessed in real time or by video submitted for review.
 - ii. A Presentation does not have to use AV technology or be given indoors.

PREREQUISITES: Nil

CROSS CREDIT: Any internationally recognized qualifications that include these components to the level of the Scope or higher. See Cross Credit Matrices

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Prepare venue for a presentation

Range: Strategy to check and ensure all technology and media are operating before the presentation, access and seating organized, if applicable emergency exits are defined and accessible.

Element 2 – Deliver a presentation

2.1 Introduce a Presentation.

Range: Speaks clearly at appropriate speed, tells audience what they are going to tell them, audience comfort considered, addresses any privacy/filming issues.

2.2 Deliver a Presentation.

Range: Links discussion to a theme, tailors' information to the specific audience, information is provided in a logical order, provides accurate and relevant information, uses stories and anecdotes, interactive questioning, uses gestures and body language, use of provocative statements.

2.3 Conclude a Presentation.

Range: Ensure conclusion reinforces initial theme and main points, offers Q&A, repeats questions asked so all can hear/understand, offers to find out information when answers are unknown, offers opportunity to follow up any outstanding questions or discussions at a later date/time if appropriate.

DATE	REVIEWERS
2017	Prepared by Graham Charles
8/5/2017	PTGA Board and Advisory Board
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
26/3/20	Qualifications Review Meeting



**POLAR
TOURISM**
Guides Association
guiding guiding



Polar Endorsement for Sea Kayak Guiding

2020 Edition

DEFINITIONS:

- Scope:** Outlines who the Test is for.
- Element:** Outlines the overall **skill set** to be Tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE:

Sea Kayak Guide – Polar Endorsement is a polar specific endorsement for an already experienced or qualified sea kayak guide. This qualification endorses their ability to operate in the polar environment with the relevant knowledge and skill sets. Any guide being assessed for this endorsement will already be proficient and competent with their personal kayak skills and have competent guiding skills ratified by an external sea kayak guiding qualification or a POE supporting these abilities.

PREREQUISITES:

- Emergency Care Qualification (>40 hour course).
- A recognised Sea Kayak Guide Certificate and/or POE supporting competence to this level.
- >100 days guiding (polar or non-polar) including high impact coastline and open seas.
- >20 excursions logged in polar environments.
- PQ Communications for Polar Operations.
- PQ Navigation Skills for Polar Operations.
- PQ Interpretation Skills for Polar Guides.

Special Notes: i. PQ Driving Small Boats/Zodiacs and Advanced Driving Endorsement – Support a Sea Kayak Operation is preferable for ship based operations but not essential.

CROSS CREDIT:

If guiding certificate covers prerequisites candidates may be cross credited in to assessment.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Planning and Preparation.

1.1 Brief clients on sea kayaking in polar environments.

Range: Personal equipment and clothing, environmental conditions associated risks and procedures (brash ice, pack ice, ice-bergs, glaciers, cold water immersion), expectation management, wildlife etiquette practice and procedures as per IAATO/AECO guidelines, assessment of client's physical ability and mental state of readiness for polar excursions.

1.2 Personally prepare for leading a polar excursion/trip.

Range: Attire for the conditions, spare clothing for self and clients, heating and sustenance strategies explained, knowledge of expected weather, communications carried in a suitable manner, specific emergency/stranding equipment with capacity for multiple hours stranded, liaison with key staff.

Element 2 – Demonstrate and/or explain launch and retrieval techniques and safety management for a sea-kayak group in the polar environment.

Range: Ship, zodiac, beach, sea ice/ice floe.

Element 3 – Identify and explain risks and management strategies for various ice and weather conditions.

Range: Pack ice, fast ice, brash ice, ice bergs and bergy bits, glacial fronts, effect of current or wind on all of the above, sudden downslope winds.

Element 4 – Identify and explain risks and management strategies for common polar mammals relevant to area of operation.

Range: Polar bear, fur seal, leopard seal, orca, walrus, whales.

Element 5 – Identify and explain risks and management strategies for cold water immersion.

Range: Mitigation measures, options for evacuation.

DATE:
2018
4/2018
20/5/2019
15/3/20

REVIEWERS:
Prepared by Sophie Ballagh, Ewan Blyth & Graham Charles,
Ballagh/Blyth, Graham Charles, Al Bakker
Qualifications Review Meeting
Qualifications Review Meeting

POLAR QUALIFICATION

Lead a Journey in Technical Terrain

2020 Edition



**POLAR
TOURISM**
Guides Association
guiding guiding



DEFINITIONS:

- Scope:** Outlines who the Test is for.
- Element:** Outlines the overall **skill set** to be Tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE:

Lead a Journey in Technical Terrain is for field staff/guides who are in charge of leading single and multi-day journeys on foot, snow shoeing, cross-country skiing in terrain that may include; snow-free glaciers, outwash plains, beach and sub tidal zones, mountains and passes or on sea-ice. Knowledge of polar camping, weather forecasting, utilizing alpine equipment for safety and simple rope assistance and confidence techniques, and making route choices in potentially hazardous terrain are essential. Journeys may involve snow or ice travel with snow shoes or crampons and ice axes. This PQ **does not** include roped glacier/crevasse travel and is a minimum requirement for longer or multi-day journeys in unknown terrain or untraveled routes.

- Special Notes:*
- i A pre-requisite day is defined as greater than 5 hours in length
 - ii The advanced first aid requirement for this PQ is any wilderness emergency care that is minimum 40 hour program.

PREREQUISITES:

- >30 days leading to the level of the Scope.
- > 80 personal days operating in Scope terrain.
- Current Wilderness First Responder award or equivalent.
- PQ Lead a Hike in Non technical Terrain.
- Advanced Terrestrial Navigation Endorsement.

CROSS CREDIT:

Any internationally recognized qualifications that include these components to the level of the Scope or higher. See Cross Credit Matrices.

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Plan and prepare for a journey.

1.1 Deliver a written plan for a multiday journey that is suitable for polar tourism.

(This is a paper exercise for assessment purposes only. It is aimed at testing planning concepts.)

Range: Aims, objectives and purpose of the trip, estimated distances and times, emergency and alternative routes, risk/hazard identification and management strategies, any consent or access issues, weather information, intentions, communications and emergency procedures.

1.2 Personally prepare for a journey.

Range: Suitable attire for the conditions, spare crucial clothing for self and clients, navigation device or strategy, knowledge of expected conditions on that particular route on that day, sunscreen, radio carried in a suitable manner, first aid kit suitable for the purpose.

1.3 Brief clients on an intended journey.

Range: Introduction, appropriate voice, language and body language, teaching/visual aids, demonstrations, learning moments, evaluation of learning, engaging clients in positive experience which encourages enthusiasm and interest.

1.4 Demonstrate/explain strategies to collect relevant local information.

Range: Real-time weather information for a given area, snow and/or avalanche conditions, crack and crevasse status, tide conditions, wildlife risk or sensitivity issues.

Element 2 – Lead, teach and safely manage a group in a given polar environment at the level of the Scope.

2.1 Effective management of the group.

Range: Pacing, rest stops, disclosure and explanation of potential dangers, route selection with regards to geography and movement around wildlife, keeping the group together; a system for accounting for everyone, establishing rapport, use of a leadership style appropriate to the conditions, group and support and support staff accompanying, situational management of hazards and wildlife encounters.

2.2 Efficient and confident personal movement in a range of different polar terrain.

Range: Sea ice, slippery beach rocks, snow, dry glacial ice, mud, talus, tussock, rocky and broken ground.

2.3 Describe the advantages and limitations of different methods of communication suitable for use on a Scope level journey.

Range: Radio, smartphone, GPS tracker, PLB, SAT phone, intentions form.

2.4 Demonstrate and/or explain safe travel practices in and around polar waterways.

Range: Alpine streams open or snow covered, glacial streams and gutters, outwash plains, undercut ice edges on coastline, sea-ice.

2.5 Demonstrate use of technical equipment.

Range: Rope and slings, improvised harnesses, hand line, belaying without fixed anchors, snow shoes, crampons, ice axe.

2.6 Instruct the use of snow shoes, crampons and ice axe.

Range: Suitable site, skills progression suitable to the clients and terrain.

2.7 Demonstrate knowledge of, and role model, accepted tourism practices.

Range: IAATO/AECO site guidelines, local area rules and laws including access issues and protocols, Leave No Trace.

Element 3 – Rescue and Crisis Management.

3.1 Discuss options and strategies for managing a crisis or rescue in given terrain.

Range: Sea-ice rescue, general strategy for managing a remote crisis.

DATE:	REVIEWERS:
2016	Prepared by Graham Charles
3/12/2016	Graham Charles <i>et al.</i>
16/10/2016	Graham Charles <i>et al.</i>
1/4/2017	Graham Charles, Phil Wickens
8/5/2017	PTGA Board
10/10/2017	GC, EB, KR input for final prior to posting
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
16/3/20	Qualifications Review Meeting

POLAR QUALIFICATION

Advanced Terrestrial Navigation Endorsement

2020 Edition



**POLAR
TOURISM**
Guides Association
guiding guiding

DEFINITIONS:

- Scope:** Outlines who the test is for.
- Element:** Outlines the overall **skill set** to be tested.
- Range:** The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.
-

- SCOPE:** **Navigation Skills** is for field staff/guides working in any area where known, or simple walks/longer treks, ski tours, skidoo excursions, landings or zodiac cruises are undertaken. It is a basic safety management competency that all field staff/guides should have.

- PREREQUISITES:** Nil

- CROSS CREDIT:** Any internationally recognized qualifications that include these components to the level of the Scope or higher. See Cross Credit Matrices.

Endorsement 1 – Advanced Terrestrial Navigation.

- 1.1 In a given location, a map is accurately orientated to north using a range of navigation tools.**
Range: Compass, smartphone, GPS, surrounding natural features.
- 1.2 Accurate compass bearings are taken from a map and followed correctly with a compass.**
- 1.3 Position is identified accurately using non-electronic navigation tools.**
Range: Map, compass, ground-map, map-ground.
- 1.4 A predetermined point is reached following a route using at least four navigation techniques and navigating around hazards.**
Range: Pacing, timing, aiming off, attack points, handrails, bypassing obstacles, following a compass bearing, using map to ground techniques, catching features, back bearings.
- 1.5 The amount of time required to travel from one given point to another in a variety of terrain is estimated and any variation to the actual time taken is justified.**
- 1.6 The travel distance from one given point to another in a variety of terrain is estimated and the variation to the actual distance is justified.**

DATE	REVIEWERS
2015	Prepared by Graham Charles
8/5/2017	Graham Charles, Alex McNeil, Phil Wickens
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting

POLAR QUALIFICATION

Working with Small Boats/Zodiacs

2020 Edition



**POLAR
TOURISM**
Guides Association

guiding guiding



DEFINITIONS:

Scope: Outlines who the test is for.

Element: Outlines the overall **skill set** to be tested.

Range: The **specific skills** to be examined. An examination **may or may not** include all of the range items. It is at the discretion of the Assessor if the Assessee shows confidence and ease in other range items as to whether they examine them or not.

SCOPE: This award recognizes the skills and knowledge and duty of guest care required by any staff who are involved in shore excursions working with and around small boats/zodiacs.

PREREQUISITES: Nil

ELEMENTS & PERFORMANCE CRITERIA:

Element 1 – Working with small boat/zodiacs

- 1.1 Demonstrate knowledge and uses of all shore kit/stranding barrel contents.**
- 1.2 Understands ship specific passenger small boat/zodiac safety guidelines and is able to enforce them.**
- 1.3 Personal Preparedness.**
Range: Suitable attire for conditions (understands the reasons for, and options to wear waders or a dry suit), radio suitably attached, spare crucial clothing items for self or passengers if required, knowledge of expected conditions and operating locations.
- 1.4 Is able to load and unload a small boat/zodiac during standard operations at a landing, on a pier or beach.**
Range: Holding craft, safe positioning and reasons why, checks for any disability or extra assistance, instruct sit/slide, elbow hook, options for bow unload, instructions for next action, cleaning boots/pants.
- 1.5 Is able to check and identify correct usage of PFD's and solve problems.**
Range: Inflatable U vests, buckled foam vests.

DATE:	REVIEWERS:
2010	Prepared by Graham Charles (for Quark and OOE)
2015	Graham Charles
2/3/2016	Graham Charles
3/9/2016	Staff of Vavilov OOE – many alts
5/12/2016	PTGA Board, Doug Gould <i>et al.</i>
8/05/2017	Graham Charles editions
9/8/2017	Graham Charles editions Flipped Small boat/zodiac and wildlife approaches
10/9/2017	Graham Charles split into Polar Endorsement and small boat zodiac ops
14/5/2018	Qualifications Review Meeting
20/5/2019	Qualifications Review Meeting
1/3/20	Qualifications Review Meeting