



PETERBOROUGH KEYS
ACADEMIES TRUST

EDUCATIONAL VISITS POLICY

Version 2.0

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1. Changes in this Version

- 1.1 Paragraph 10 rewritten to clarify charging and assist EVCs with this policy point.

2. Scope and Rationale

- 2.1 Peterborough Keys Academies Trust (PKAT) provides a rich and varied programme of opportunities for students to learn outside the classroom - on the school site, the local area and further afield. The programme of visits is structured and progressive to gradually develop young peoples' confidence, independence, responsibility and specific learning objectives.
- 2.2 We believe that student and staff involvement in residential and non-residential visits adds significant value to school life and enhances our core values and ethos. First-hand experience adds breadth and depth to the Curriculum and enhances social, moral, spiritual and cultural development.
- 2.3 We aim to:
- (a) Provide a broad programme of visits.
 - (b) Ensure access for all students including those with additional needs.
 - (c) Develop continuity and progression throughout a student's school experience.
 - (d) Enable students to discover a sense of community, social responsibility, initiative, resourcefulness and self-reliance.
- 2.4 This policy covers all off-site visits and some on-site learning outside the classroom. This policy is managed by PKAT Headteachers' and Educational Visit Co-ordinators' (EVC). It provides a framework for staff planning off-site visits.

3. Provision of Guidance for staff planning visits

- 3.1 PKAT has formally adopted the OEAP *National Guidance (NG)* as its Employer Guidance found on the following web site: www.oeapng.info.
- 3.2 It is a legal expectation that PKAT employees must work within the requirements of their employer's guidance; therefore, PKAT employees must follow the requirements of National Guidance, as well as the requirements of this policy.

4. Systems for Managing this Activity

- 4.1 PKAT has systems in place covering a range of key areas vital to the safe and successful delivery of off-site activity.

5. Specific Arrangements

- 5.1 PKAT has a Service Level Agreement for specialist advice from the Outdoor Education Adviser (Stephen Brown). Each PKAT school has an Educational Visit Co-ordinator who is trained and updated. There is a clear process for planning and approval of visits, using EVOLVE software for Zone 2 and 3 visits. There is a defined process in place for Zone 1 visits. Oversight for this system is with PKAT Headteachers', with the Management/Trust receiving reports when appropriate and requested.

6. Insurance

- 6.1 PKAT has insurance policies in place to cover this area of work. Specific activities may require further cover which should normally be with the insurers. Please see your EVC regarding the cover note or other insurance matters including additional insurance cover.

7. Managing Risks

- 7.1 PKAT has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring PKAT to provide such support, training and resources to its employees as is necessary to implement this policy.
- 7.2 The risk management of an activity should be informed by the benefits to be gained from participating. A "Risk-Benefit Assessment" approach is adopted. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is "acceptable". As part of learning, young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

8. Emergencies and Critical Incidents

- 8.1 PKAT's Critical Incident Plan has been updated and reviewed. It covers the possibility of having to manage an off-site visit emergency. Senior staff who may have to implement the plan are trained and briefed. The Adviser service provides support and information, linked to the Visit Emergency Support Network (VESN).

9. Monitoring

- 9.1 As an employer PKAT ensures that there is sample monitoring of the visits and outdoor activities undertaken by the staff. Such monitoring should be in keeping with the recommendations of National Guidance.

10. Charging

- 10.1 Local authorities, maintained schools and academies (including free schools, studio schools and University Technical Colleges) must take account of the law relating to charging for school activities, as set out in sections 449 to 462 of the Education Act 1996.

10.2 General Principles

No charges may be made unless the governing body of the school or local authority has drawn up a charging policy giving details of the optional extras or board and lodging that they intend to charge for, and a remissions policy. Schools and local authorities **must not** charge for:

- (a) education provided during school hours;
- (b) education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education;
- (c) transport provided in connection with any educational visit of this type;
- (d) supply teachers to cover for teachers who are away from school on a visit.

It should be noted that 'part of the National Curriculum' is not restricted to learning outside the classroom experiences that are specifically subject based but includes, for example, activities designed to fulfil requirements under the National Curriculum 'inclusion statement'.

Schools and local authorities **may** charge for optional extras, which include:

- (a) education provided outside of school time that is not:
 - (i) part of the National Curriculum;
 - (ii) part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school;
 - (iii) part of religious education;
- (b) board and lodging for a pupil on a residential visit, except to parents in receipt of certain benefits (broadly equivalent to those that qualify children for Free School Meals);
- (c) extended day services offered to pupils (e.g., activity clubs).

Schools must inform parents on low incomes and in receipt of relevant benefits of the support available to them when they ask for contributions.

10.3 Definition of "School Time" and "Non-school Time"

Where an activity or visit takes place partly during and partly outside normal school hours, the Education Act 1996 prescribes a basis for determining whether the activity is deemed to take place either "in" or "out" of school hours. This depends first on whether the venture is residential or non-residential.

10.4 Single Day (Non-Residential) Activities

A non-residential activity is deemed to take place during school hours if 50% or more of the activity occurs during school hours. This includes any travelling time that falls during school hours. School hours do not include the midday break.

Where less than 50% of the activity falls during school hours, the venture is deemed to take place in non-school time. An example might be an activity that requires pupils to leave school an hour or so earlier during the afternoon and which does not end until late in the evening.

10.5 Residential Visits

If the number of school sessions taken up by the visit is equal to or greater than 50% of the number of half days spent on the visit, it is deemed to have taken place during school hours (even if some activities take place late in the evening). Whatever the starting and finishing times of the school day, regulations require that the school day is divided into two sessions. A "half day" means any period of twelve hours ending with noon or midnight on any day. A school session is treated as being part of a residential visit when 50% or more of the time allowed for that session at the school is taken up by the visit.

Example 1: Visit during school hours Pupils are away from noon on Wednesday to 9pm on Sunday. This counts as nine half days including five school sessions, so the visit is deemed to have taken place during school hours.

Example 2: Visit outside school hours Pupils are away from school from noon on Thursday until 9pm on Sunday. This counts as seven half days including three school sessions, so the visit is deemed to have taken place outside school hours.

10.6 Voluntary Contributions

The restrictions on charging do not prohibit the local authority or school from seeking voluntary contributions in support of an activity or visit. Such contributions must, however, be genuinely voluntary. Consequently, it must be made clear to parents that there is no obligation to contribute, and students must not be treated differently according to whether their parents have made any contribution. The policy on allocating places for such a visit must be clear at the outset.

It is important to provide written information to parents. This should explain the nature of the proposed activity or visit, the likely value in educational terms and the financial contribution per student which would be required if the activity were to take place. The information should emphasise that there is no obligation to contribute, and that no student will be excluded because parents are unwilling or unable to contribute. However, it must be made equally clear whether the activity or visit is likely to be cancelled if there are insufficient contributions.

There is no limit to the level of voluntary contribution, nor is there any restriction on the way in which such contributions may be used. Thus voluntary contributions may be used to subsidise students of lesser means and to pay the travel and accommodation costs of accompanying teachers.

10.7 Summary of Permissible Charges

The extent to which charges may be levied is dependent upon the answers to the following questions:

- (a) Is the activity or visit regarded as a statutory requirement?
- (b) Is the activity or visit to be held in school time?

If the answer to either question is "yes", the only charges that may be levied relate to the cost of board and lodging. No charges may be levied for either the travel or the educational activities.

If the answer to both questions is "no", the activity or visit is an "optional extra" and the full cost may be levied. However, any charge made in respect of individual pupils must not exceed the actual cost of providing the activity or visit, divided equally by the number of pupils participating. It must not therefore include an element of subsidy for any other pupils wishing to participate whose parents are unwilling or unable to pay the full charge.

10.8 Further information

Government guidance on charging for school activities is available at www.gov.uk/government/publications/charging-for-school-activities. This includes details of the benefits which exempt parents from being charged for board and lodging.

11. Links to other Key Policies

- 11.1 This policy links to other PKAT policies and therefore these areas are defined and not repeated.

12. Staff

- 12.1 PKAT works to the principle that staff have been assessed as competent to undertake such responsibilities as they have been assigned, for leading or assisting on visits. This assessment may include a review of previous visits, leadership experience from other areas and for certain activities a formal qualification. The EVC will lead on this process but may involve other senior staff.
- 12.2 The EVC should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies.

- 12.3 Advice can be sought from the Adviser when required.
- 12.4 Staff Roles are defined on the NG website and staff taking on a specific role should read and understand the advice contained within defined documents associated with the role. Roles include, Visit Leader, Assistant Leader, EVC, Headteacher and Governing Body and voluntary helpers.

13. Vetting

- 13.1 Staff deployed onto visits are subject to PKAT's safeguarding processes and arrangements. Volunteers are also included.

14. Effective Supervision

- 14.1 PKAT follows national guidance in that there are no specific and defined ratios for visits, but that the staff on the visit work to the principle of effective supervision at all times.

15. Planning

- 15.1 PKAT works with the principle that educational visits are both successful and have risk managed, not solely through risk assessments, but by good planning from the very start of the visit planning process.

16. Working with Outside Providers

- 16.1 All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. This is a vital dimension of risk management. It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.
- 16.2 Examples of such schemes include:
- (a) The LOtC Quality Badge.
 - (b) AALS licensing.
 - (c) Adventuremark.

- (d) NGB centre approval schemes.

17. Planning for Inclusion

- 17.1 Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.
- 17.2 PKAT takes all *reasonably practicable* measures to include all young people. The principles of Inclusion should be promoted and addressed for all visits and outdoor learning thus ensuring an aspiration towards:
 - (a) An entitlement to participate.
 - (b) Accessibility through direct or realistic adaptation or modification.
 - (c) Integration through participation with peers.

18. Good Practices

- 18.1 All staff and helpers must be competent to carry out their defined roles and responsibilities. National Guidance sets a clear standard to which the Visit Leaders **must** work.
- 18.2 The guidance states: "*a competent Visit /Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:*
 - (a) Knowledge and understanding of their employer's guidance supported by establishment-led training.
 - (b) Knowledge and understanding of the staff, the activity, the group and the venue.
 - (c) Appropriate experience.
 - (d) In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification."
- 18.3 Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful

consideration of competence issues are applied to both newly qualified and newly appointed staff.

- 18.4 Good planning for a visit should include a consideration of all the variable factors:
- (a) **S**taffing requirements – trained? experienced? competent? ratios?
 - (b) **A**ctivity characteristics – specialist? insurance issues? licensable?
 - (c) **G**roup characteristics – prior experience? ability? behaviour? learning and other additional needs? medical needs?
 - (d) **E**nvironmental conditions – like last time? impact of weather? water levels? social factors?
 - (e) **D**istance from support mechanisms in place at the home base – transport? residential?

19. Transport

- 19.1 Careful consideration should be given to this area. This policy supports groups travelling by the most appropriate means which can include, walking, public transport – buses, trains and tube, taxi and private cars, coach and aircraft. The NG website contains details to assist in planning for transport.

20. Alcohol

- 20.1 Leaders and volunteers must not drink alcohol at any time whilst they are on a school visit to safeguard themselves and students.

21. Version History

- 21.1 Table of Versions

VERSION	ACTION	RESPONSIBLE	DATE
1.0	Created from JHS template and in collaboration with LA Outdoor Education Advisers for the Trust	Chris GAME	

2.0	Policy updated and clarity given for charging process	Chris GAME	13/06/2023

22. APPENDIX 1 - OEAP Guidance for Unaccompanied Expeditions

Adopted by Cambridgeshire County Council working with Academies

OEAP Guidance for Unaccompanied Expeditions – May 2019 v1.0

- 22.1 The Outdoor Education Advisers' Panel recognises the huge benefits that remotely supervised, unaccompanied expeditions eg. DofE Award, BTEC Public Services, GCSE Trekking, John Muir Award, fieldwork trips and all other self-supported expeditions can bring to individuals and teams. These include leadership, teamwork, self-motivation, communication, confidence, resilience and consideration for others. Expeditions typically take individuals out of their comfort zones and provide a broad range of challenges for them. The sense of achievement from completing an expedition can be significant and profound.
- 22.2 This document provides a framework for the planning and supervision of self-supported expeditions and self-led activities (including day walks) in the terrain defined in this document.
- 22.3 Expedition staff teams should emphasise the benefits of all adults working as a team. However it is good practice to have a lead Expedition/Visit Leader who holds the overview of the whole expedition and an appropriately competent deputy.
- 22.4 Employers need to ensure that staff involved in remote lone working during expeditions are competent and aware of the safety implications including emergency procedure and relevant issues. Staff should ensure safe working practices.
- 22.5 Leader Competence

There are four recognised ways to demonstrate the competence of leaders:

- (i) To hold the relevant qualification.
- (ii) To hold an equivalent qualification (uniformed services, overseas awards etc.).
- (iii) To have received appropriate in house training (verified by a technical expert)*.
- (iv) To be competent through experience (verified by a technical expert)* www.hse.gov.uk/pubns/priced/L77.PDF paragraph 22-28.

**A statement of competence written by an appropriately qualified technical adviser must provide evidence for options 3 and 4.*

The leader's competences need to be matched to the terrain in which the expedition teams will be working and the mode of travel used.

22.6 Deploying staff who do not hold NGB awards or Statements of Competence

Where an accompanying member of staff does not hold a relevant NGB Award, or does not have a current Statement of Competence from a suitable Technical Adviser, the Expedition Leader may determine the best use of such staff by taking into account additional training or awareness courses that have been undertaken. Examples of these are:

- (a) Training Courses for NGB Awards – eg. Mountain Training Awards (LL/HM/ML), Sports Leaders UK (LWL/LEL).
- (b) Training Courses for AALA recognized Awards eg. The Countryside Leader Award.
- (c) Training/Skills Based Courses such as the DofE Expedition Supervisor Course and the DofE Expedition Skills Course.
- (d) Training/Skills Based Courses provided by LA's and other organisations such as Uniformed and Voluntary organisations – Cadets/Scouts/John Muir Award etc.

The final decision on deployment of staff lies with the employer and judgements should be supported by robust Risk Management strategies, documentation and evidence of competence. In addition, there should be careful scrutiny of the suitability of the expedition and the safety cover provided by a competent person (eg. the Outdoor Education Adviser).

23. Appendix 2 – Roles and Responsibilities

	Name	Responsibilities	Competence
Staff assessed as competent (See appendix 4)	Expedition / Visit Leader	<p>Responsible for the overall planning and management of the expedition, including the deployment of assistant leaders and additional adults.</p> <p>For all considerations, please see: www.oeap.info 3.4 Visit Leader</p> <p>NOTE: For DofE expeditions: refer to DofE Supervisor role description on www.dofe.org and www.oeapng.info OEAP National Guidance document 7B.</p>	<ol style="list-style-type: none"> 1) See Table 4 below 2) OEAP visit leader training recommended / mandatory dependent on employer requirements 3) Familiar with the area where expedition is taking place and competent to look after themselves in that environment.
	Assistant Leaders	<p>Works under the direction of the Expedition/ Visit Leader to train and supervise the participants to the appropriate standard</p>	<ol style="list-style-type: none"> 1) Need to be competent for the role assigned by the Expedition leader. 2) Must meet the criteria in Table 4 3) OEAP visit leader training recommended/mandatory dependent on employer requirements 4) Familiar with the area where expedition is taking place and competent to look after themselves in that environment
Support Staff	Additional Support Staff	<p>May support the Expedition Leader/Assistant Leaders with training/supervision where appropriate</p> <p>Must operate under the supervision of the Expedition Leader/Assistant Leaders at all times</p> <p>Where Additional Support Staff are deployed, the Expedition Leader/assistant leaders will remain responsible for all groups</p> <p>Additional Support Staff are present only in a supporting role</p> <p>Additional Support Staff MUST NOT supervise the use of camping stoves unless they have been suitably trained and are overseen by an appropriately qualified person (eg the Expedition Leader)</p>	<p>Deployed by Expedition Leader:</p> <ol style="list-style-type: none"> 1) Staff with appropriate experience who have completed NGB Training (e.g. Lowland Leader training) 2) Staff with appropriate experience who have completed a DofE DES Course 3) Experienced walker with navigation skills, able to look after their own safety, and able to retrieve their situation in an emergency <p>Additional considerations:</p> <ul style="list-style-type: none"> ❖ Experienced teacher / teaching assistant/youth worker/or similar ❖ Prior knowledge of the group ❖ Familiar with route and area used ❖ Current First Aid qualification

	Adult Helper	<p>Works under the direction of the Expedition/ Visit Leader to carry out limited tasks that do not require the competences outlined in the Table 4 below.</p> <p>To support with:</p> <ul style="list-style-type: none"> ❖ Welfare/behaviour/pastoral care ❖ Logistics/transport/backup ❖ Non-remote check points ❖ Additional First Aid cover where qualified ❖ Adult Helpers can also help with lone working scenarios & with staffing gender issues. 	<p>Assessed (by the EVC/ Organisation Head/Manager with advice from the Expedition/ Visit leader) as competent to support the activity.</p> <ol style="list-style-type: none"> 1) Undergone safeguarding checks (essential) 2) Prior knowledge of the group 3) Basic knowledge of the area 4) Ideally possess knowledge & understanding of First Aid
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24. Appendix 3 – Ratios of Adults to Young People

24.1 A minimum of 2 adults must accompany an Expedition. If there are male and female participants, it is advisable to have a leader of each sex.

24.2 The following expedition staffing ratios are starting points for consideration based on risk assessment.

24.3

Staff Ratios on Unaccompanied Expeditions		
Terrain 1 (see Table 4)		
1 Team	1 Expedition Leader and either 1 Assistant Leader, 1 Additional Support Staff or 1 Adult Helper	
2 Teams	1 Expedition Leader and either 1 Assistant Leader or 1 Additional Support Staff	
3 Teams	1 Expedition Leader and 1 Assistant Leader	<ul style="list-style-type: none"> ❖ If 2 members of staff are supervising 3 or 4 teams, serious consideration must be given to the emergency plan should one member of staff be incapacitated or need to take a participant to hospital. In these instances a third competent member of staff will be required in order to continue with the expedition as planned. ❖ There will be some circumstances where an Assistant Leader (or an appropriate member of Additional Support Staff) may be necessary for each team. The risk assessment process will determine this. (e.g. practice expeditions or where teams are working independently - different routes/large areas)
4 Teams	1 Expedition Leader and 1 Assistant Leader	
5 Teams or more	The minimum ratio of 1 Expedition Leader/Assistant Leader for every 2 teams must be maintained Eg. 5 teams require at least 1 Expedition Leader and 2 Assistant Leaders	
Terrain 2 & 3 (see Table 4)		
1 Team	1 Expedition Leader and either 1 Assistant Leader, 1 Additional Support Staff or 1 Adult Helper	
2 or more Teams	1 Expedition Leader and normally 1 Assistant Leader for each team (Consider whether a third member of staff is required in order to effectively manage an emergency situation)	
3 Teams	1 Expedition Leader and 2 Assistant Leader	<p>In order to deal with Emergencies effectively a third competent member of staff is required where there are 3 or more teams operating</p> <p>There will be some circumstances (e.g. practice expeditions) where an Assistant Leader may be necessary for each team. The risk assessment process will determine this.</p>
4 Teams	1 Expedition Leader and 2 Assistant Leader	
5 Teams or more	The minimum ratio of 1 Expedition Leader/Assistant Leader to 2 teams must be maintained E.g. 5 teams will require 1 Expedition Leader and 2 Assistant Leaders (additional Leaders may be required)	
Taken from AALA Guidance Note 5.13: Supervision of DofE Expeditions		
In licensable terrain:		
<ul style="list-style-type: none"> ❖ Where teams are operating independently (not in the same area/ immediate vicinity) then each Assistant Leader deployed to supervise a team should hold a HML (or higher) or hold a statement of competence from an appropriate technical adviser ❖ Where Teams are operating in close proximity then each assistant deployed to supervise a team would need at least a statement of competence from an appropriate technical adviser 		

24.4 Expedition Leaders and their advisers should ensure that sufficient numbers of competent staff (see Table 4) are deployed to ensure effective supervision is in place at all times.

24.5 Effective supervision is essential and the above table provides the minimum framework under which expeditions can take place.

24.6 Risk Management

Expedition/Visit leaders and assistant leaders should consider all relevant factors before and during the expedition to inform the 'risk benefit' assessment. This should include all-weather routes for expeditions in Wild Country as well as good-weather routes.

The proximity of the teams must be taken into account at all times as well as the starting and finishing points and the location of the check points. This must be part of the ongoing risk management process.

- (a) See OEAP National Guidance: www.oeapng.info:
- (b) Section 4.3c Risk Management – An Overview
- (c) Section 4.3f Risk Management – some practical advice
- (d) Section 4.3g Risk Management – what to record and when.

24.7 All expeditions must be approved/scrutinised/notified by the appropriate Educational Visits Co-ordinator/Headteacher/Manager/Education Visit Adviser/Employer.

25. Appendix 4 – Walking Expeditions (Summer Conditions)*

25.1

Terrain 1	Competence	First Aid
<p>Lowland Country</p> <p>Farmland, valleys and woodland with no hazardous terrain (eg. cliffs, very steep slopes, water hazards etc.) and no more than 3km away from a key access point such as a car park, lay by or populated area (any potential escape routes should also lie within Lowland Country).</p> <p>Walks must follow paths or tracks that are both marked on a map and clearly visible on the ground and that do not require navigation across untracked areas and must use bridges or other recognised water crossing points.</p>	<p>Lowland Leader (LL) OR Lowland Expedition Leader (LEL)/Basic Expedition Leader (BEL) OR Countryside Leader Award (CLA) OR a higher qualification OR</p> <ul style="list-style-type: none"> ❖ Equivalent qualification ❖ In house training with a statement of competence signed off by a technical adviser ❖ Appropriate experience signed off by a technical adviser 	<p>Minimum of 16 hours with an outdoor element recommended</p>
<p>Terrain 2</p> <p>Moorland Country</p> <p>Open, uncultivated, non-mountainous, high or remote country (known variously as upland, moor, bog, fell, hill or down), which should not require movement on steep or rocky terrain in either a planned or unplanned situation.</p> <p>Walks should be in areas enclosed by well-defined geographical or man-made boundaries such as classified roads (areas that merge with mountain regions without well-defined boundaries should be regarded as Mountain Country).</p>	<p>Hill and Moorland Leader Award (HML) Walking Group Leader (WGL) OR a higher qualification OR</p> <ul style="list-style-type: none"> ❖ Equivalent qualification ❖ In house training with a statement of competence signed off by a technical adviser ❖ Appropriate experience signed off by a technical adviser 	<p>Minimum of 16 hours required outdoor element recommended</p>
<p>Terrain 3</p> <p>Mountain Country</p> <p>Wild country which may contain steep and rocky ground where walkers are dependent upon themselves for immediate help.</p>	<p>Mountain Leader Summer (MLS) or a higher qualification OR</p> <ul style="list-style-type: none"> ❖ Equivalent qualification ❖ In house training with a statement of competence signed off by a technical adviser ❖ Appropriate experience signed off by a technical adviser 	<p>Minimum of 16 hours required Outdoor element recommended</p>

25.2 Please Note:

- (a) *In case of winter conditions refer to your Outdoor Education Adviser for further advice before planning.
- (b) There is an additional camping module for Lowland Leader and Hill and Moorland Leader awards.
- (c) A 3-year first aid revalidation is required to keep all first aid qualifications valid.

25.3 When applying this guidance to DofE Expeditions please ensure you follow the DofE requirements:

- (a) <http://www.dofe.info/en/content/cms/leaders/resources-download/expedition-d...>

25.4 Remote Supervision

- (a) <http://www.mountain-training.org/walking/other/dowlands> please click on walking and downland 2016 remote supervision guidance PDF
- (b) www.oeapng.info Section 4.2a Group Management and Supervision

25.5 Emergency Planning

- (a) www.oeapng.info Section 4.1 All Documents

25.6 DofE Approved Activity Providers

- (a) Many schools now buy in leadership services (ie. Leaders with appropriate NGB awards) from Approved Activity Providers (AAP). If you engage the services of an AAP to deliver your expeditions they must follow the requirements of this Policy. An AAP should be providing competent instructors in accordance with this guidance and the qualification matrix.
- (b) If the expedition falls into the description of Terrain 1 (Table 3) the school's DofE Manager/ Co-ordinator should:
 - (i) Check if the provider (AAP) holds a current Learning Outside the Classroom (LOtC) Quality Badge <http://lotcqualitybadge.org.uk/search> and or an AALA Licence.
 - (ii) If the provider does not hold a LOtC quality badge – seek further evidence and assurances about safety and educational quality.
 - (iii) Require the Provider/AAP to complete a Providers' Questionnaire (www.oeapng.info 8p).

- 25.7 If the expedition terrain falls into the description of Terrain 2 or Terrain 3 in Table 3, or if watersports are done on 'specified water' (that is the sea, tidal waters, inland waters more than 50 metres from the nearest land or on turbulent inland waters) then the AAP you engage should hold an Adventurous Activities Licensing Authority license. This license can be checked by using the provider search: [http://www.aals.org.uk/aals/provider search.php](http://www.aals.org.uk/aals/provider%20search.php).
- 25.8 When engaging the services of an AAP, schools must remember that they retain the overall responsibility for their students on expedition at all times. It is good practice that there should be staff from the school/organisation in attendance on the expedition, particularly overseeing and supporting the pastoral care and welfare of students.

26. Appendix 5 – Cycling Expeditions Leader

- 26.1 Competence: this appendix gives the qualification requirements for levels of terrain for cycling expeditions. These cycling specific qualifications are in addition to and must be complemented with walking expedition qualifications as detailed in Appendix 4.
- 26.2 Cycling expeditions may take place using public roads, towpaths and other non-technical terrain. Alternatively the expedition may take place on marked trails in wilderness areas, and the leaders' qualifications need to be matched to the terrain in which the expedition teams will be working. For simplicity this terrain has been split into two distinct categories, please note this does not directly relate to Bronze, Silver and Gold DofE Expeditions.

Description of Terrain	NGB Qualification
<p>Trail terrain: non-technical, that does not involve specific route selection; gentle to moderate rolling terrain, for example, rocks, roots or other obstacles in order to ride on it. It can be as narrow as handlebar width.</p> <p>Typical trail terrain includes: Canal paths and public highways, way-marked routes, rights-of-way on which cycles are permitted, identifiable routes, tracks and trails with obvious navigational features. These routes will be 90-95% rideable and take the group no more than 30 minutes' walk by a reasonably fit person away from the nearest accessible road or a shelter with communication.</p>	<p>On Road: British Cycling Ride Leader Level 1</p> <p>Off Road: British Cycling Ride Leader Level 2 Off Road Non-Technical Terrain</p> <p>CTC Trail MTB Leader Award</p> <p>COLA Level 1 Mountain Bike Trail Leader MBLA Trail Cycle Leader</p> <p>Cycling UK Trail Mountain Bike Leader MBCUK Trail Leader MIAS Level 1 and 2</p> <p>or</p> <ul style="list-style-type: none"> ❖ Equivalent qualification ❖ In house training with a statement of competence signed off by a technical adviser ❖ Appropriate experience signed off by a technical adviser.
<p>Technical terrain: routes with obstacles, which require technical skill to be ridden over or avoided, such as roots, rocks or holes. It does not necessarily mean large drop offs or seemingly unachievable sections, but the sort of terrain that most mountain bikers may come across on a normal ride.</p> <p>Typical technical terrain includes: single-track, farm and moorland tracks and paths and other mountain bike accessible rights of way with sections requiring line</p>	<p>British Cycling MTB Leader Level 2 BSCA Mountain Bike / Off Road Leader</p> <p>Cola level 2 MBA</p> <p>CTC Technical Terrain Leader Award MIAS Level 2</p> <p>Cycling UK Technical Mountain Bike MBCUK Technical Trail Leader</p> <p>MBLA Mountain Bike Leader</p>

<p>selection to ride. Technical Terrain also includes trail terrain and public highways and roads.</p> <p>Areas of remoteness to any height above sea level and more than 30 minutes' walk from the nearest shelter with communication that are easily exited in a few hours, returning to a refuge or an accessible road.</p> <p>(Areas that merge with mountain regions and do not have well defined boundaries are excluded)</p>	<p>or</p> <ul style="list-style-type: none"> ❖ Equivalent qualification ❖ In house training with a statement of competence signed off by a technical adviser ❖ Appropriate experience signed off by a technical adviser.
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- 26.3 For overnight expeditions Leaders must also hold the relevant walking qualification for the level of terrain they are operating in. See Table 1.
- 26.4 It must be noted that participants will be carrying all of their expedition equipment both on their bikes and on their person and good route selection and planning is essential, as bike handling will become more difficult with a loaded bike.
- 26.5 For all other considerations for cycling expeditions follow ALL the on foot expedition guidelines.

27. Appendix 6 – Paddlesport

- 27.1 The link below gives the qualification requirements for training and supervising young people for expeditions on water. These paddlesport specific qualifications are in addition to and must be complemented with walking expedition qualifications as detailed in Section 1.
- 27.2 Paddlesport expeditions may take place using canals, rivers and other inland waterways, lakes or at sea. These waters can be familiar to the participants but as participants improve the waterways are usually in rural areas and unfamiliar and more advanced expeditions could pass through wild country and moving water either current, tide or large bodies of water could be part of the challenge.
- 27.3 Leaders' competence and qualifications need to be matched to the environment in which the expedition teams will be working.
- 27.4 Please visit:
- (a) [https://www.britishcanoeingawarding.org.uk/guidance-documents/British Canoeing Environmental Definitions and Deployment Guidance for Instructors, Coaches and Leaders](https://www.britishcanoeingawarding.org.uk/guidance-documents/British%20Canoeing%20Environmental%20Definitions%20and%20Deployment%20Guidance%20for%20Instructors,%20Coaches%20and%20Leaders)
- 27.5 For all other considerations for paddlesport expeditions follow ALL the on foot expedition guidelines.

28. Appendix 7 – Duke of Edinburgh Expeditions – Horse

28.1 Rationale:

- (a) The use of horse travel is encouraged and will be used mainly in a road and bridleway environment. It allows a group to explore at greater distance and into new areas. There is some significant complexity to this activity that needs to be included in training young people. This includes horse competence on roads and tracks, group management, equine care and carrying expedition equipment. There are also expedition and camping issues that might not be covered in training courses.

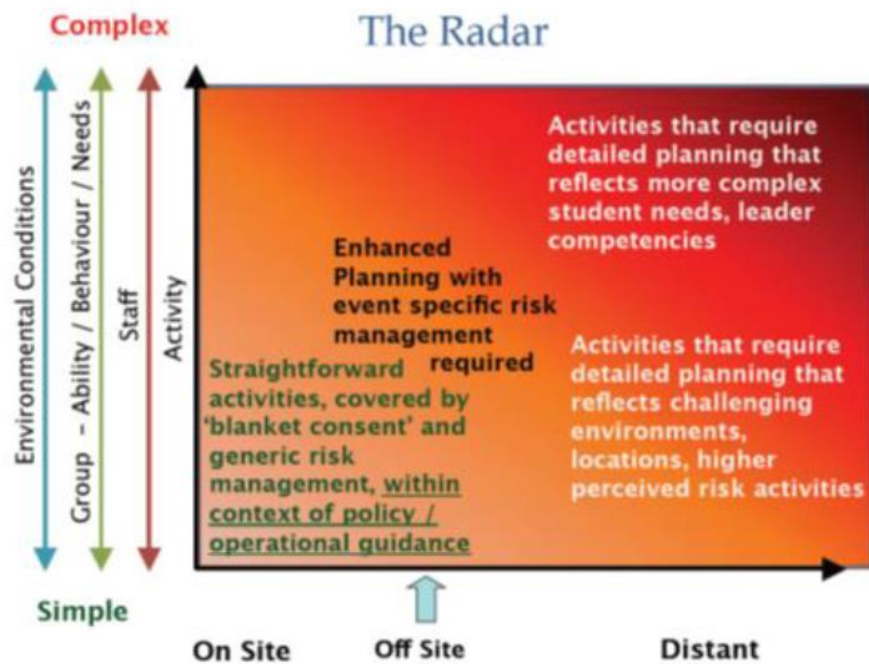
28.2 Qualifications:

- (a) At present (2018) there is not national award for leading, training and supervising expeditions. The Adviser for Outdoor Education will take advice from the British House Society to determine the training and qualification required.

28.3 Please ask the Adviser for Outdoor Education for advice when considering this activity to ensure that all aspects have been considered.

Environment	Qualifications	Group Size - Training	Group Size - Assessment	Other considerations
Road and Short tracks linking roads, usually all on minor roads Normal countryside	OE advice with BHS	This will vary according to route and environment, experience of the staff. Normally defined by the Awarding body.	This will vary according to route and environment, experience of the staff. Normally defined by the Awarding body.	First Aid Qualification is required and camping experience
Road and more extensive tracks, moving from one track to the next, demanding journeys and remoteness.	OE advice with BHS	As above	As above	First Aid Qualification is required and camping experience
Extensive use of off road and upland environments, remote settings and navigational challenges	OE advice with BHS	As Above	As Above	First Aid Qualification is required and camping experience

29. Appendix 8 – All Schools Guidance



29.1 Zone 1 Activity

This area of work has been put into practice by schools and these notes are to assist your school with developing this Zone in your policy.

Zone 1 is defined as activity that is not very complex and close to the school, it will include regular venues and activities. This allows the staff to know the venue and activity well and therefore risks are more easily managed. It is not defined by a geographical distance as some schools travel further to regular venues than other schools.

A view from one school

29.2 Descriptor for Zone 1

This school is on the edge of a town and has a zone one that covers the walk around the immediate school area, walks into town, visits to the local secondary school for sports and other activity, and covers all the sporting fixtures after school, but not sporting festivals at weekends as they are one offs and usually further away.

29.3 Action taken

The EVC has met with the staff and talked about the range of venues and activity that they would see in Zone 1. They also agreed the procedures for working within Zone 1.

The EVC has drafted the RBA form that can be added to by other staff on the day or revised in a years' time when the procedures are reviewed.

All details are shared with staff.

29.4 **Example - On the Day Procedures (small school)**

Staff must ensure EVC or Headteacher knows we are going out. Sign out at Office, giving details of:

- (a) Where we are going
- (b) Who is going and any medication required to travel (eg. epipens)
- (c) What time we are leaving
- (d) What time we are expected back

Phone number and emergency cards are carried by staff.

This should cover all aspects – of Zone 1.

29.5 **ARK - Accident Response Kit**

Sometimes local visits do not take place as too much to organise quickly and easily. This system works well. The office holds 3 rucksacks that go on all off-site visits, Zone 1 – 3. It contains, First Aid Kit, some emergency food, suntan lotion, water, spare woolly hat and gloves, - all depending on the season.

This allows staff to arrive with a group at the school office, collect the ARK, sign out and depart.

29.6 **EVC Action**

As with all activity – this should be monitored and reviewed to ensure that standards are being maintained.

The Adviser is happy to advise if required.

30. Appendix 9 – Event Specific Notes, Draft Example

What are the really important things we need to do to keep ourselves safe?

There are many support documents and National Guidance on the Outdoor Education Advisers Panel Website. This can be accessed through the RESOURCES tab in Evolve

Visit Details:

Carried Out by:

Date:

<p style="text-align: center;">Issue</p> <p style="text-align: center;">Consider STAGED: Staff, Timings, Activity, Group, Environment, Distance</p>	<p style="text-align: center;">How to Manage It</p>	<p style="text-align: center;">Who to be informed</p>		
		Parents	Staff	Participants
<p>Staff – Supervision / Safeguarding</p> <p>Are all staff aware of their responsibilities? Involve them in the planning and meet with them prior to leaving. Please share all essential information with them.</p>	Ensure supervising staff are competent and understand their role			
	Ensure number of staff ensure an effective level of supervision (consult with EVC if needed)			
	All staff DBS Checked			
	Will students at any point be out of contact with school staff?			
	Are non-Trust staff (e.g. centre staff) in contact with students all DBS checked?			
	How do you know? (use of external provider questionnaire)			
	Students supervised by Trust staff where possible. If not, inform parents prior to trip letter			
Students work in groups given information regarding contact with adults / remain in groups / emergency contact information				
<p>Staff: Additional Notes:</p>				

Issue Consider STAGED: Staff, Timings, Activity, Group, Environment, Distance	How to Manage It	Who to be informed		
		Parents	Staff	Participants
Timings – Is everyone aware of the programme for the trip and have a full itinerary? What if they change?	Pre-meeting with students and staff			
	Parents aware in trip letter prior to signing their children up			
	What to do if timings change? Contact information of parents / use of social media / emergency contact support with Senior Staff			
	All contact information on Evolve			
	Know who your emergency contacts are (see EVC)			
Timings: Additional Notes				
Activity – Are all students capable of the activities? Do they need prior training / instruction? Where possible, involve students in the risk management process	Where needed carry out preliminary visit to the location to assess risks and plan the programme (or ensure the proposed locations for the visit are suitable for the activity and manageable for the group)			
	Inform everyone aware of the nature of the activities which will be carried out. Provide training if necessary			
	Inform everyone aware of the appropriate conduct and specific risks regarding the event			
	Inform everyone aware of their roles, responsibilities regarding the event			
	If necessary, have a student contract for student and parent to sign			
Activity: Additional Notes				

Issue Consider STAGED: Staff, Timings, Activity, Group, Environment, Distance	How to Manage It	Who to be informed		
		Parents	Staff	Participants
Group – what are the individual needs of the group? Are there specific needs that need detailed planning? Plan and use suitable group control measures (e.g. buddy systems, large groups split into small groups each with named leaders)	Obtain information from parents about additional needs away from school where necessary			
	Take advice from SENCO / Key worker / Medical team			
	Make necessary arrangements for individual students including individual Event Specific Notes and additional staffing if necessary			
Group: Additional Notes				
Group Medical Needs – A first aid kit is required for all trips Does the trip leader 'have a working knowledge of simple first aid and is competent to use the first aid materials carried with the group'?	All staff to be aware of medical students			
	All staff aware of control measures for medical students / see Medical team support			
	Students allocated to specific member of staff			
	If necessary seek advice (school Medical team) or take first aid trained staff on trip			
	Use of Key worker / Teaching Assistant / Well known adult			
	Contact parents where necessary for most recent medical information and advice			
Group Medical Needs: Additional Notes				

Issue Consider STAGED: Staff, Timings, Activity, Group, Environment, Distance	How to Manage It	Who to be informed		
		Parents	Staff	Participants
Illness or Injury	Leaders know how to call emergency services or emergency contacts			
	Students and parents are asked to provide information about medication and medical conditions			
	Mobile phone carried if available. Who has the number(s)?			
	Emergency contacts with school / establishment and parents arranged (register list with Main Office and SLT emergency contact where necessary)			
	All emergency details / contacts (including staff) are uploaded into Evolve			
Illness or Injury: Additional Notes				
Environmental Conditions – have a plan B	Consider possible weather conditions and plan appropriate programme, clothing and equipment			
	Plan for students who may not bring suitable clothing			
	Daily weather forecast obtained and plans adjusted accordingly			
	Are all students able to access the activities / conditions			
Environmental Conditions: Additional Notes				

<p style="text-align: center;">Issue</p> <p style="text-align: center;">Consider STAGED: Staff, Timings, Activity, Group, Environment, Distance</p>	<p style="text-align: center;">How to Manage It</p>	<p style="text-align: center;">Who to be informed</p>		
		<p style="text-align: center;">Parents</p>	<p style="text-align: center;">Staff</p>	<p style="text-align: center;">Participants</p>
<p>Indirect / Remote Supervision – check location and students are suited to this type of supervision</p>	<p>Ensure students are sufficiently briefed and competent (any individual students for whom indirect supervision is not suitable must be directly supervised)</p>			
	<p>Clear guidelines and emergency procedures set and understood</p>			
	<p>Students remain in pairs or groups (buddy system – each responsible for named other)</p>			
	<p>Rendezvous points and times set. Do students / adults know where they are?</p>			
	<p>Students know how to contact staff</p>			
	<p>Staff understand they remain responsible for the students</p>			
	<p>Parents informed and aware of supervision prior to leaving (information in letter to parents when signing up for the visit)</p>			
<p>Indirect / Remote Supervision: Additional Notes</p>				
<p>Travel – look at guidance on Evolve. Brief students prior to leaving regarding safety / conduct etc</p> <ul style="list-style-type: none"> ❖ Use reputable travel companies (see National Guidance) Resources tab on Evolve ❖ School minibus drivers need appropriate licence and training – please check ❖ Private vehicles – see Evolve (Resources tab) for guidance 	<p>Lateness – what is your plan for this?</p>			
	<p>Regular headcounts and ensure seatbelts worn</p>			
	<p>Staff sit / walk in appropriate places to supervise</p>			
	<p>Check driving hours of long journeys</p>			
	<p>Student briefing and supervision if using service stations / exiting and returning to vehicles</p>			
	<p>On foot – use of pavements / visibility / crossing roads</p>			
	<p>Public transport – crowded area / entry and exit points / what if separated?</p>			

<p style="text-align: center;">Issue</p> <p style="text-align: center;">Consider STAGED: Staff, Timings, Activity, Group, Environment, Distance</p>	<p style="text-align: center;">How to Manage It</p>	<p style="text-align: center;">Who to be informed</p>		
		<p style="text-align: center;">Parents</p>	<p style="text-align: center;">Staff</p>	<p style="text-align: center;">Participants</p>
<p>❖ Public transport</p>	<p>London underground – what is students’ previous experience and plan for this – crowded areas / increase headcounts / possibly smaller groups / what if separated? Plan of action. Are students aware of the plan and procedure?</p>			
<p>Travel: Additional Notes</p>				
<p>Event Specific Additional Notes:</p>				