



South Tyneside Council

# **Guidance for Offsite Visits and Adventurous Activities**

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# 1 General

South Tyneside Council (the LA) acknowledges the immense value of off-site visits and related activities to young people, and fully supports and encourages those that are well planned and managed.

This document provides concise and supportive guidance for the planning and management of off-site visits and related activities.

The LA uses the web-based system 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits. All staff that lead or accompany visits can access their own EVOLVE account, which is set up by their establishment's Educational Visits Coordinator (EVC). As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including: search and report facilities, downloadable resources and information, staff records and visit history, gateway access for parents, etc.

EVOLVE: [www.southtynesidevisits.org.uk](http://www.southtynesidevisits.org.uk)

EVOLVE must be used for all off-site visits, including residential, overseas and adventurous visits – see [Approval](#) and [Planning](#)

The new national online guidance resource **OEAP Employer Guidance (Guidance for the Management of Off-site visits and LOfC activities)** is an invaluable reference document, which should be read alongside this booklet. It is available from: <http://OEAPeg.info/>

If information is in variance to the advice in **OEAP Employer Guidance (EG)**, the advice in this booklet should be followed. If managers or visit leaders require further information or advice they should contact South Tyneside Council's Outdoor Education Advisers Martin Simpson (Tel: 0191 4240118 , e-mail [info@simonsideoutdooradventure.com](mailto:info@simonsideoutdooradventure.com) or Alex D'Ambrosie (Tel: 0191 4240118, e-mail [alex.dambrosie@southtyneside.gov.uk](mailto:alex.dambrosie@southtyneside.gov.uk)). (Academies may have their own arrangements for H&S Advice).

Where another employer (such as the Governing Body of a Voluntary Aided school) wishes to opt into South Tyneside's guidance and/or systems and processes for supporting and monitoring visits and LOfC activities, they should produce a policy statement that makes this clear. Academies will require a service level agreement.

The **OEAP Employer Guidance** document [Status Remit and Rationale](#) clarifies the range of employees whose work requires them to use this guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom (LOfC)
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base;

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

As outlined in **Status Remit and Rationale** this guidance:

“applies to most situations where adults acting in the course of their employment take responsibility for children and young people taking part in learning and recreational activities in an environment that is different from where the young people are usually based. It therefore applies when organising and supervising children and young people participating in off-site activities and visits, as well as when taking part in an on-site activity outdoors”.

For a more detail on legal requirements, refer to **OEAP Employer Guidance** document: [Requirements & Recommendations for Employers](#) (Underpinning Legal Framework)

**If you have difficulty finding the guidance you need , or require clarification or further help and guidance, contact your establishment’s Educational Visits Coordinator (EVC), or the LA Outdoor Education Adviser Martin Simpson (Tel: 0191 4240118, e-mail [info@simonsideoutdooradventure.com](mailto:info@simonsideoutdooradventure.com)) or SYP Service Manager, Alex D’Ambrosie (Tel: 0191 424 0118, email [alex.dambrosie@southtyneside.gov.uk](mailto:alex.dambrosie@southtyneside.gov.uk)**

## Commissioning

Where a South Tyneside Council employee commissions an offsite activity or adventurous activity (within the remit of this guidance), they must ensure that the commissioned agent has either:

1. adopted South Tyneside Council’s guidance (Guidance for Off-site visits and Adventure Activities)  
**or**
2. there are systems and procedures in place where the standards are not less than those required by Employer Guidance (Guidance for the Management of Off-site visits and LOfC activities).

## 2 Role of the Educational Visits Coordinator

To help fulfil its health and safety obligations for visits, establishments must appoint an Educational Visits Coordinator (EVC) who will support the Head of Establishment. (In small establishments the EVC may also be the Head or manager).

The EVC should be specifically competent, ideally with practical experience in leading and managing a range of visits similar to those typically run by the establishment. Normally, but not exclusively, such competence will be identified in a person on the senior management of the establishment. A key role of the EVC is to assess the competence of staff to lead visits. If the EVC does not have the professional background and competence for this task it will be the responsibility of the Head/ Head of Service/Manager.

### South Tyneside Council’s Educational Visit Coordinator (EVC) Training

All LA Services & Schools running offsite activities (or adventurous activities on site) with under 18s are required to have a current, trained EVC in post. EVCs must undertake a formal revalidation every 3 years. Details of this can be found within the training tab and news section through South Tyneside’s Evolve page and at [www.simonsideoutdooradventure.com](http://www.simonsideoutdooradventure.com)

For the purposes of day-to-day updating of information, South Tyneside EVCs and Visit / Activity Leaders are directed to the posting of *EVC Updates* available on EVOLVE, the visit planning and management website.

The EVC should support the Head of establishment in ensuring that competent staff are assigned to lead and accompany visits, see [Section 12](#), and with approval and other decisions. The EVC should ensure that an establishment policy is in place for educational and off-site visits, and that this is updated as necessary, and readily available to staff, e.g. via EVOLVE.

Refer to **OEAP Employer Guidance** document: [EVC responsibilities](#)

### **Charges for Off-site Activities and Visits**

Governors, Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to **OEAP Employer Guidance** document: [Requirements and Recommendations for Employers \(Charges for Off-site Activities and Visits in an Educational Establishment\)](#).

### **Preliminary Visits and Provider Assurances**

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. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement. (Refer to **OEAP Employer Guidance** document: [Preliminary Visits and Provider Assurances](#))

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.

Examples of such schemes include:

- The LOtC Quality Badge
- AALS licensing
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).
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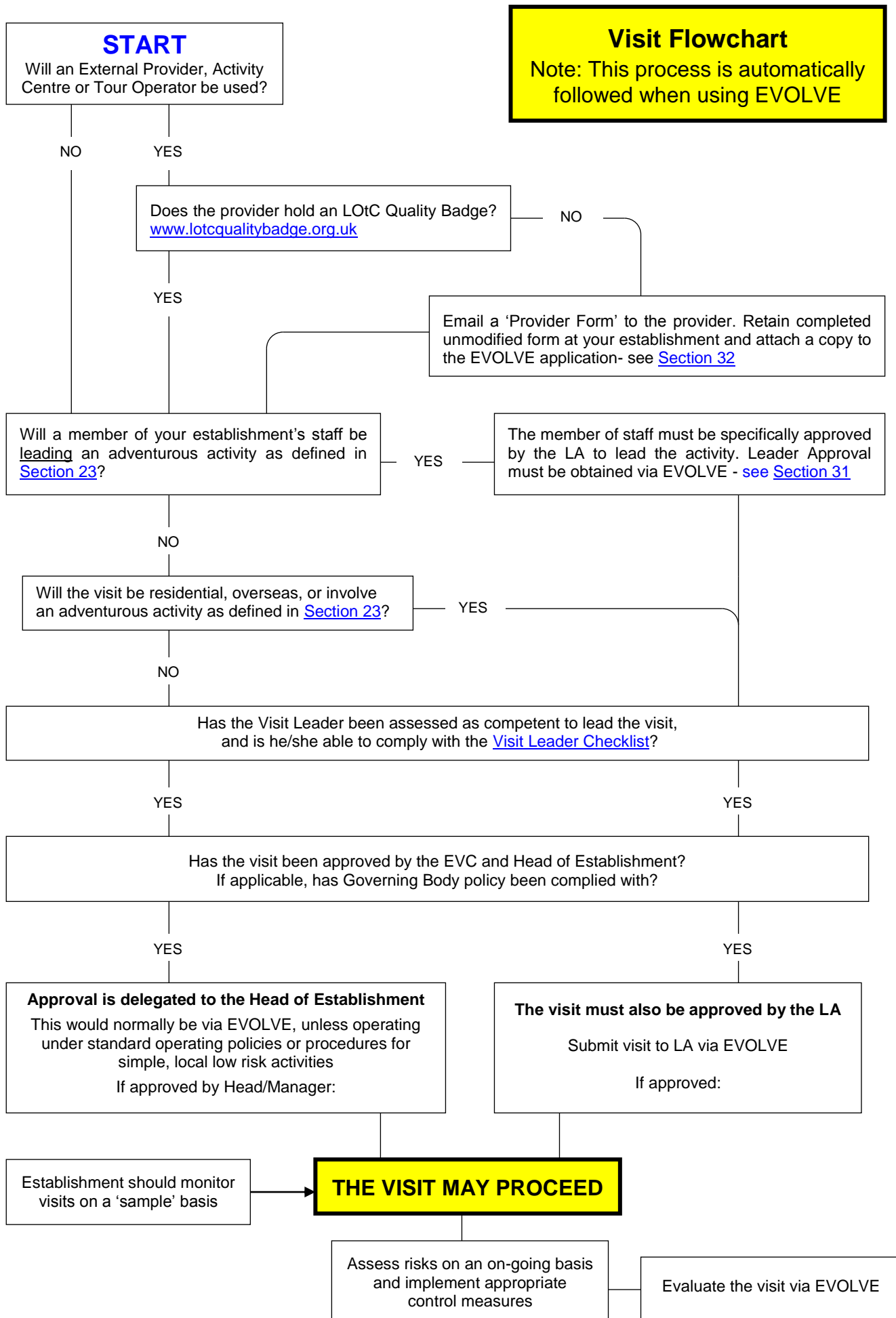
## **3 Role of Governors and Management Boards**

Refer to **OEAP Employer Guidance** document: [Management Board and Governor Check List](#)

Under Health & Safety law the employer has primary responsibility for Health, Safety & Welfare of employees and students.

In establishments where the LA is not the employer the Governors or Management board will normally hold this responsibility. Voluntary Aided schools and Academies may decide to buy services from the LA to support them in this responsibility (e.g. South Tyneside's guidance systems and processes for supporting and monitoring visits and LOtC activities).

Refer to **OEAP Employer Guidance** document: [Requirements & Recommendations for Employers](#)



## 4 Approval of Visits

Based on the visit types, EVOLVE automatically directs the flow for approval.

Approval is normally delegated to the Head of Establishment for all visits, except for the following visit types:

- overseas
- residential
- those involving an adventurous activity as defined in [Section 23](#)

The above three categories are 'authorised' within the establishment, but are 'approved' by the LA via EVOLVE. These visits must be planned and submitted using EVOLVE. All other visits (classified as "None of the above" on EVOLVE) are also planned and approved on EVOLVE. (See [Planning](#))

In approving visits the Head of Establishment and EVC should ensure that the visit leader has been appropriately inducted/trained, and is competent to lead the visit, see [Section 12](#)

A member of staff intending to supervise or instruct an adventurous activity, as defined in [Section 23](#) must be specifically approved by the LA to do so, see [Section 28](#)

## 5 Outcomes

Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved. Up to four 'intended' outcomes may be recorded on EVOLVE during the planning process, for subsequent evaluation.

Work that takes place outside the classroom can provide a powerful means of developing learning in all curriculum areas, raise attainment, increase attendance and improved behaviour. Experiential learning can also provide opportunities for development in other areas, including:

- Relationships
- Emotional & spiritual
- Cross curricular
- Individual
- Teamwork
- Environmental

Preparatory work should take place in advance of the visit where appropriate. This, in conjunction with activity that will take place during the visit, should feed into any follow up work.

Refer to **OEAP Employer Guidance document:** [Evaluation of LOtC](#)

[High Quality Outdoor Education](#) can be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place.

## 6 Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. You are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Disability Discrimination Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. Adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.



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.

Establishments should take all *reasonably practicable* measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in establishment policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Employers, Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Disability Discrimination Act 1995, it is unlawful to:

- treat a disabled young person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

Refer to **OEAP Employer Guidance** document: [Inclusion](#)

## 7 Responsibilities

The Health and Safety at Work etc Act 1974 places overall responsibility for health and safety on educational visits with the employer:

- For community schools, community special schools, voluntary controlled schools, maintained nursery schools, pupil referral units, and statutory youth groups all other South Tyneside Council departments that leads off site visits with young people, then the employer is the local authority. These establishments **must** adhere to this guidance document.
- For academies, foundation schools, and voluntary aided schools, the employer is usually the governing body or proprietor. Although welcome to do so, these establishments are not obliged to use the guidance of the LA. If using LA guidance, this should be clearly stated. If not using LA guidance, establishments are advised to ensure that the systems in place are as robust as those of the LA.

All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place. Establishments should have a Visit Policy to clarify responsibilities and procedures.

Refer to **OEAP Employer Guidance** document: [How to write an Establishment visit Policy](#).

Refer to the following responsibility checklists:

- **OEAP Employer Guidance** checklists: [Visit Leader](#), [EVC](#), [Head/Manager](#), [Parent/Guardian](#), [Management/Governor](#)
- **OEAP Employer Guidance** document: [Planning Basics](#)
- **OEAP Employer Guidance** powerpoint: [Planning Visits, Off-site Activity and LOtC](#)



## 8 Monitoring

The task of monitoring visits and activities is delegated to Heads of establishments supported by EVCs. Monitoring should be in keeping with the recommendations of **OEAP Employer Guidance** document: [Requirements & Recommendations for Employers \(Monitoring\)](#)

## 9 Planning

Planning should reflect the consideration of legal and good practice requirements, ensuring:

- The plan is based on establishment procedures and employer guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

EVOLVE provides a means of recording planning during the planning phase, and enables the EVC and Head/Manager to monitor, contribute and support the activity. It is recommended that staff use EVOLVE for planning all visits as this ensures a consistent and proportional system is applied.

Other benefits include:

- Having a central record of all visits
- Having a full record of staff experience, which provides a database of evidence to support decisions on competence
- Providing a central record of staff qualifications
- The EVC is able to produce customised reports for governors, OFSTED etc
- If staff use the system regularly they rapidly become fluent and confident
- All staff have ready access to employer guidance relating to visits.

The extent of planning required is related to the complexity of the visit, see:

- Diagram: [Planning and EVOLVE](#)
- **OEAP Employer Guidance** document: [Visit Leader Checklist](#)
- **OEAP Employer Guidance** [RADAR](#) model: based on STAGED: Staffing, Timings, Activity, Group, Environment, Distance.

### Risk Management

Refer to **OEAP Employer Guidance** document: [Risk Management Good Practice](#)

Risk management tasks are delegated to establishments and are normally carried out by visit leader and assistants with the support of EVCs as required. Risks are expected to be reduced to an *acceptable* or *tolerable* level, and not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity.

Many aspects of planning will normally already be in place in the form of existing policies and guidance, such as the establishment's own policy, LA policy, etc. These, in conjunction with the EVOLVE Visit Form may be sufficient for a particular visit, as it is not necessary to repeat generic policies on EVOLVE.

Due to the complex nature of off-site visits, conventional 'risk assessment' as a stand-alone tool is not particularly useful and can on occasion be misleading. It is of greater benefit to consider the overall 'risk management' of visits by taking all aspects of visit planning and management into account. This can be achieved effectively through a combination of the EVOLVE visit form itself, and where appropriate, any event specific notes or attachments.

Visit planning includes consideration of the question: *'What are the really important things that we need to do to keep us safe?'* It should focus on those issues that are individual to the specific event, taking into account the needs of the group (including special and medical needs), the experience and competency of the staff team and the leader, in the context of the event. Significant issues must be recorded on EVOLVE, as either notes or an attachment, and shared with all parties.

This planning process by the leader may be compared to the expectation of a teacher or youth worker to plan a lesson/session which is relevant to the needs of the group.

Planning that includes adventurous activity commonly involves delivery by an external provider (see [Section 29](#)) and the provider will have responsibility for risk assessing and managing the activity. As such, the provider's risk assessment is not the concern of the establishment leader, does not need to be requested from the provider, and **does not need to be attached to EVOLVE**.

Alternative arrangements (Plan B) should be included within the planning process where appropriate, for example, where weather conditions or water levels might be critical, or where an overcrowded venue might necessitate an alternative option. This must also be risk assessed.

It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions, and will become more 'risk aware' and hence at less risk. They will also have greater ownership of the event.

This is endorsed by HSE in [Principles of Sensible Risk Management](#)

Refer to **OEAP Employer Guidance** document: [Planning Basics](#)

Refer to **OEAP Employer Guidance** powerpoint: [Planning Visits, Off-site Activities & LOtC](#)

## **Timescales**

Heads and EVCs should establish timescales for submission of visits that allow time for proper scrutiny – and for any necessary modifications to be made. Some flexibility may have to be allowed for contingencies but a culture of late submission of visits should not be permitted as it tends to result in poor planning. Generally the lead in period should be proportional to the complexity and nature of the visit – so for example residential and overseas visits normally require a longer 'lead – in' period.

Visits requiring LA Approval needs to be submitted (to the LA) at least 21 days prior to departure to allow for the possibility that the form is returned for clarifications or for arrangements to be amended. The LA aims to process forms within 10 working days – but remember the form may be returned with queries or comments that require amendments and resubmission prior to approval. Where a contract is to be signed and a deposit paid, the application should be submitted with an outline plan before a commitment is made in case of any major issues. In some cases this may mean a visit form is initially submitted 12 to 18 months prior to proposed departure. Further details can be added at a later stage.

## 10 Safety During the Visit

Prior to the visit, staff must ensure that all participants understand what is expected of them. This includes any 'rules' that will be in place. These should be reemphasised as appropriate during the visit.

Monitoring of the visit must be ongoing, and this contributes towards both enjoyment and safety.

It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (or switch to Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

Following the visit, the visit leader should record any significant issues as a note on EVOLVE, for both reference and to inform future visits.

Refer to **OEAP Employer Guidance** document: [Responsibilities of Visit Leader](#)

## 11 Parent / Carer Consent

In South Tyneside written consent from parents is required for pupils to take part in off-site activities organised by a school/organisation as these activities take place during school/organisation hours. **This can be done at the beginning of pupil's life at the school for trips that are during school hours and are expected to be part of the curriculum and normal school life. This is known as one off consent.** Sometimes, out of courtesy an information letter with a tear off slip where parents/carers acknowledge their receipt of information and sign to do so, can be used. For residential visits, overseas trips, adventurous activities or those visits where there is an increased risk then specific written consent is required. This will be either using the LA's own template or your own establishment's standard form.

National Guidance gives three examples of parental consent that may be adopted, South Tyneside Council agree that a combination of these types of consent are used, in particular options 2 & 3. See link for information <http://oeapng.info/2567-parental-consent/> and view section 4.3d. If opting for option 1 as an establishment then mechanisms must be in place to inform parents that their child is off site at the particular time.

**A combination of one off consents and specific activity consents is recommended by South Tyneside Council.** A template that has been approved by South Tyneside Council is available through Evolve in the documents section. Other providers may require you to complete enrolment/registration forms prior to taking part in their activities. Simonside Outdoor Adventure and Thurston Outdoor Education Centre require **all** participants to complete their consent forms prior to any individuals participating.

If schools choose to adopt a version of the DFE 'one-off' consent form they will need to put in place separate arrangements for ensuring that essential information is kept up to date including:

- Emergency contact names and numbers
- Medical issues and allergies/Care Plan information

For further guidance on interpretation and implementation refer to OEAP National Guidance [Click Here](#)

## 12 Competence to Lead

The competence of the visit leader is the single most important factor in the safety of participants. It is the responsibility of the Head/ Manager and the EVC to ensure the competence of the visit leader in accordance with the guidance in this document and the relevant sections of **OEAP Employer Guidance**.

## Assessment of Leader Competence

The EVC and/or Head of establishment must consider the following when assessing the competence of a member of staff to lead a visit:

- a) What experience has the leader in leading or accompanying similar or other visits? (Check Visit History on EVOLVE).
- b) Is the leader competent in planning and managing visits (has s/he completed Visit Leader Training? With Simonside OA)
- c) What are the leader's reasons for undertaking the visit?
- d) Is the leader an employee of the local authority / establishment?
- e) Does the leader have the ability to manage the pastoral welfare of participants?
- f) Does the leader exhibit sound decision making abilities?
- g) What experience has the leader of the participants he/she intends to supervise?
- h) What experience has the leader of the environment and geographical area chosen?
- i) Does the leader possess appropriate qualifications?
- j) If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- k) If leading adventurous activities, has the leader been 'approved' by the LA?
- l) Is the leader aware of all relevant guidelines and able to act on these?

Refer to diagram: [Planning with EVOLVE](#)

Refer to **OEAP Employer Guidance** documents: [Assessment of Activity and Visit Leader Competence](#) and [Assessment of Competence](#)

## South Tyneside Visit Leader Training

Based on a nationally agreed syllabus, this course is strongly recommended for all those who lead visits and **is a requirement for visit leaders from September 2015**.

- Training room based, covers legal and employer requirements, planning and approval procedures, risk management etc. This is available as a 2 ½ session.

Details of Group Leader Visit Training can be found on South Tyneside Councils Evolve page on the training tab in resources or latest news items as well as [www.simonsideoutdooradventure.com](http://www.simonsideoutdooradventure.com)

## 13 Staffing and Supervision

On all visits there must be 'effective and active supervision' that has been approved by the EVC and Head of Establishment, and where applicable, is in accordance with Governing Body policy.

Ratios for Early Years are specified and must be adhered to; see [Statutory Framework for the Early Years Foundation Stage](#)

For all other visits the visit leader, EVC and Head of establishment will make a professional judgement regarding the number and suitability of staffing on an individual visit basis after consideration of the factors outlined in **OEAP Employer Guidance** document: [Ratios and Effective Supervision](#).

A visit must not go ahead where either the visit leader, EVC, or Head is not satisfied that an appropriate level of supervision exists.

Staff who are assigned to support the special needs of an individual cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

Staff and volunteers who work *frequently* or *intensively* with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process. For the purpose of this guidance:

- '*frequently*' is defined as 'once a week or more'.
- '*intensively*' is defined as 'four or more days in a month, or overnight'.

## **Children of group leaders and other supervising staff**

There are a number of issues of concern if staff propose to take their own children on a visit, for example:

- the child may not be suitable for the activity or age appropriate
- staff may be distracted by dealing with their own children, particularly if they are tired or unwell and this may compromise their ability to carry out their responsibilities for the rest of the group effectively;
- there may be additional costs incurred, which should be met by the staff member.

Heads/Managers and EVCs should review the risk assessment to consider whether the presence of a supervisor's child will require these assessments to be modified. **Staff taking their own children on a visit should not be included in the calculation of the overall staff ratio i.e. there must be sufficient appropriately qualified and experienced staff to safely manage the group without them if necessary.**

**The Head/Manager must specifically check if insurance cover is in place for the child/children concerned.**

Refer to **OEAP Employer Guidance** document: [Group Management and Supervision](#)

Refer to **OEAP Employer Guidance** document: [Vetting and CRB Checks](#)

## **14 First Aid**

First aid provision should form part of the risk assessment for all visits. This will help to determine first aid staffing and equipment.

**On each visit one of the staff must be a competent first aider, with a readily available first aid kit and the arrangements for providing first aid must be clear to all staff involved.**

Competence may be recognised by prior knowledge and experience, or, **preferably, as a result of formal training.** Leaders are encouraged to attend a course run by the Red Cross, St. John Ambulance, or other HSE recognised training provider.

**At least one of the staff on any residential visit must hold a current First Aid qualification.**

The level of staff competence which may be required will depend on many factors including:

- The nature of the programme and whether it is residential (**see note above regarding qualification**)
- Whether the programme includes adventurous activities
- The numbers in the group
- The extent to which "outside" first aid assistance is available (e.g. at a residential centre)
- The environment and particularly whether it is abroad or remote.
- The health and medical needs of group members.

First Aid requirements for Early Years are specified and must be adhered to; see [Statutory Framework for the Early Years Foundation Stage](#).

If staff are delivering outdoor and adventurous activities the leader (and/or assistant) must hold a current first-aid certificate and carry a suitable first-aid kit. (Where employees hold Outdoor Activity coaching qualifications, they will normally be required by the governing body of the sport to hold a current first aid certificate for the award to be valid). It is desirable for them to hold one of the HSE approved first aid courses designed to train people to cope with first aid situations in the outdoor environment.

Advice and assistance in arranging these courses can be obtained from the Outdoor Education Adviser Martin Simpson ([info@simonsideoutdooradventure.com](mailto:info@simonsideoutdooradventure.com)). Where adventure activities are provided by an AALS licensed provider, instructors should hold recognised first aid qualifications, in which case it may not be essential for school/organisation staff to hold a qualification.

Refer to **OEAP Employer Guidance** document: [First Aid](#)

## 15 Insurance for LA Schools and Services

Advice regarding insurance may be sought from the Local Authority's Insurance section. In the first instance contact Clare Whiteley (0191 424 7652) [clare.whiteley@southtyneside.gov.uk](mailto:clare.whiteley@southtyneside.gov.uk)

In addition to the standard public liability cover which all establishments will have in place the Council offers LA Schools the opportunity to buy into:

- a 'blanket' personal accident cover / travel insurance for all off site activities.

Academies must make their own insurance arrangements.

Appropriate insurance must be in place for all visits.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See [www.dh.gov.uk](http://www.dh.gov.uk)

## 16 Transport

Refer to **OEAP Employer Guidance** document: [Transport: General Considerations](#)

### Private Cars

Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Head of Establishment, and a [Private Car Form](#) must be completed and retained by the establishment on an annual basis. For employees this may be supplemented by copies of relevant documents. Seatbelts must be worn and legal requirements relating to child restraints and booster seats must be complied with. All staff must have business insurance included on their own policy.

Refer to **OEAP Employer Guidance** document: [Transport in Private Cars](#)

### Coaches

The LA approves coach companies which can be found on Evolve. Whilst UK legislation requires coach companies to be fit for public use, the facilities available on coaches may vary. The Visit Leader should ensure that coaches and buses are hired from a reputable company. Liaising with other establishments within the LA that have used a particular company (via a search on EVOLVE)



will help to determine the level of service that may be provided. When booking coaches ensure seatbelts are fitted.

## Minibuses

Establishments that own or hire a minibus must have an operational policy in place for this. For further information, see also:

- South Tyneside Council documents **Minibus - Driver Responsibilities** and **Guidelines for safe operation of school minibuses**. (See Guidance section of EVOLVE – under Resources / Guidance, Policies and Documents.)
  - Refer to **OEAP Employer Guidance** document: [Transport in Minibuses](#)
  - Directgov [Driving a minibus](#)
  - ROSPA '[Minibus Safety: A Code of Practice](#)' 2008
  - MiDAS (Minibus Driver Awareness Scheme) via [Community Transport Association UK](#)
- This also contains information on PCV licences, weight limits and towing.

## 17 Farm Visits

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

Refer to **Farming & Countryside Education**: [www.face-online.org.uk](http://www.face-online.org.uk)

Refer to **OEAP Employer Guidance** document: [Farm Visits](#)

## 18 Water Margin Activities

This section applies to:

**Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow\* water. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment, or water-going craft.**

\*In this context, paddling means walking in shallow sheltered water (below knee height on the participants) whilst clothed i.e. with trousers rolled up or shorts and clothing on the upper body.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

At the outset the establishment must decide whether the activity:

- Falls **within** the definition in bold above - in which case the guidance below applies,  
or
- Exceeds** the definition in bold above - in which case this is a water-**based** adventurous activity and [Section 19](#) applies.

All staff involved in water-margin activities should be conversant with the guidance contained within [Group Safety at Water Margins](#) . This document must be made available to all supervising adults in advance of the visit.

As with all visits, where appropriate there should be an approved and risk assessed alternative/ 'Plan B' that could be used where conditions dictate, and for which parental consent has been obtained if necessary. LA approval is not required for water-margin activities, but the leader must have previous relevant experience, and must have been assessed as competent to lead the



activity by the EVC and/or Head of Establishment. South Tyneside Council recommends that supervising staff on activities at water margins should consider completing The RLSS Water Safety Management Programme Course (WSMP) levels 1 & 2 as a minimum. Simonside Outdoor Adventure delivers these courses, check Evolve for dates course run.

## 19 Water-Based Activities

For clarification of the differences between water-margin and water-based activities see [Section 18](#). The LA acknowledges the immense educational benefits that water-based activities can potentially bring to young people, and fully supports and encourages water-based activities that are correctly planned, managed, and conducted. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

The following are not regarded as adventurous activities for the purposes of LA approval:

- Swimming in publicly lifeguarded pools - see [Section 20](#)
- Water-margin activities as defined in [Section 18](#)
- Use of commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

With the exception of the above, all other forms of water-based activities are regarded as adventurous activities, and as such require LA approval.

The responsibility for the safety of participants in an adventurous activity will rest with either:

a) **An external provider** - see [Section 29](#)

The provider must hold an [LOtC Quality Badge](#) or complete a [Provider Form](#)

Note: If a Provider holds an [AALS licence](#) (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff retain a 'pastoral' duty of care.

**or**

b) **A member of your establishment's staff** – (see [Section 28](#) and for further details on adventure activities refer to [Appendix 1 – Adventure Activities and Overseas Expeditions](#). This person must be specifically approved by the LA to lead the activity, via EVOLVE.

In order to participate in water-based activities, participants should normally be water confident. Participants who lack water confidence may still be able to take part subject to consideration of all factors, including the activity itself and supervision arrangements. The level of water confidence of all participants must be known by the activity leader prior to the commencement of water-based activities.

Leaders should have knowledge of the water conditions/hazards (and potential changes) that might be encountered, and prepare accordingly. Local advice must be sought where appropriate, e.g. coastguard, harbour master, other site users, etc.

Personal buoyancy conforming to the appropriate National Governing Body must be worn at all times by all participants in water based activities, except, at the discretion of the activity leader, where the activity:

- a) takes place in a swimming pool, **or**
- b) is 'swimming', **or**
- c) is an activity for which personal buoyancy would not normally be worn by young people.

## 20 Swimming

The LA acknowledges the immense educational benefits that swimming activities can potentially bring to young people, and fully supports and encourages swimming activities that are correctly planned, managed, and conducted.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken. For paddling refer to [Section 18](#) Water Margin Activities.

All swimming activities and venues must be included within the visit plan, and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example, a hotel pool may be available.

Particular consideration should be given to the following factors:

- Unknown locations and hazards, especially overseas.
- Changing environmental conditions.
- Supervisor complacency & lack of transferable knowledge.
- Adherence to local advice.
- Preparation and knowledge of young people, i.e. is it a planned activity?

**Young people must be supervised by a competent adult at all times whilst undertaking swimming activities. The following criteria apply:**

### **Swimming pools (lifeguarded)**

LA Approval is not required

- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.
- For publicly lifeguarded pools abroad, the establishment's staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
- Unless suitably qualified, the establishment's staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.
- For swimming lessons, the LA establishment should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

**For open water swimming and pools without lifeguards refer to [Appendix 1 Adventure Activities & Overseas Expeditions](#)**

## 21 Residential Visits

The LA acknowledges the immense educational benefits that residential visits can potentially bring to children and young people, and fully supports and encourages residential visits that are correctly planned, managed, and conducted.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

## Supervision on Residential Visits

Mixed parties engaged in journeys involving an overnight stay should normally be accompanied by at least one adult of each sex. In this case the responsible adult may be a parent or student over the age of 18, acceptable to the group leader, assessed as being suitable by the Head/Manager and DBS checked in accordance with council / employer guidance.

**In Primary Schools** it may be acceptable for female teachers only to accompany mixed parties provided the Governors, Head, parents and staff involved are satisfied that this is an appropriate arrangement.

Staff retain a duty of care for young people throughout the visit – even if a provider is delivering activities or assisting with overnight supervision. They are always responsible for pastoral care and must be able to deal with an emergency effectively, at all times.

Establishments should have clear written policies relating to staff conduct on residential visits. Some establishments, for example, require staff not to smoke in front of young people, and clearly it would be unprofessional for staff to drink alcohol on any visit. Policies should be discussed with volunteers as part of their briefing / induction.

Heads, EVCs and Visit Leaders should check:

- Insurance is in place for all participants (including staff and volunteers) LA establishments should attach the application form to the EVOLVE Visit Form.
- All staff have been appropriately DBS checked
- The accommodation is suitable for the group (for example the provider may hold a LOTC Quality Badge, or should complete the relevant sections of the [Provider Form](#). (The Provider Form should be attached to the EVOLVE application). Also refer to [Section 29](#)

Refer to **OEAP Employer Guidance** document: [Residential Visits Mindmap](#)

### Non prescription medicines and residential visits

**In Schools** the policy of the LA is that non-prescription medicines should not normally be given to pupils. This policy is designed to protect the best interests of the child, as well as those of staff. It takes into account several factors:

- the child may well be able to return home if s/he is unwell;
- generally the child will return home at the end of school and a parent/guardian can administer medication if appropriate;
- it should be relatively straightforward to visit a doctor, if required.

However this approach may be inappropriate **on a residential visit**. If a child develops toothache during the night, or a young woman is suffering from period pains, it may be both impractical (and inappropriate) to call a doctor or visit casualty. In some circumstances (during a long coach journey to France for example) it may be difficult to visit a doctor to deal with a problem such as a migraine.

Taking into account the circumstances it may be appropriate, in accordance with the expectation of the 'duty of care' which the group leader holds, for him/her to use judgement and common sense (as a parent would) and provide a mild painkiller, however:

"Staff should **never** give a non-prescribed medicine to a child unless there is specific prior written permission from the parents. Where the head agrees to administer a non-prescribed medicine it **must** be in accordance with the employer's policy. The employer's policy should set out the circumstances under which staff may administer non-prescribed medicines. Criteria, in the national standards for under 8s day care providers, make it clear that non-prescription medicines should not normally be administered. Where a non-

prescribed medicine is administered to a child it should be recorded .....and the parents informed..... **A child under 16 should never be given aspirin or medicines containing ibuprofen unless prescribed by a doctor”.**  
(DFE - Managing Medicines in Schools and Early Years Settings)

It must be emphasised that the group leader would take this role on a voluntary basis. Establishments should clarify their approach to non-prescribed medicines in their Visit Policy. They may wish to use a modified version of the [Model Letter](#), to obtain parental consent for providing non prescription medicines. Alternatively this could be incorporated into the main consent form for the visit.

## 22 Overseas Visits

The LA acknowledges the immense educational benefits that overseas visits can potentially bring to young people, and fully supports and encourages overseas visits that are correctly planned, managed, and conducted. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

**For all visits** it is essential that consideration is given to the following:

- a) Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- b) Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- c) Transport systems have been assessed as safe for use.
- d) Advice should be sought regarding the need for inoculations (or other treatment) to be taken as a precautionary measure prior to the visit.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: [www.fco.gov.uk](http://www.fco.gov.uk) ('Home' page, 'Travel & Living Abroad', 'Travel Advice by Country'). All relevant FCO information should be circulated amongst the staff team.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See [www.dh.gov.uk](http://www.dh.gov.uk) and <https://www.ehic.org.uk/Internet/home.do>

### Exchange Visits

The LA has adopted the **OEAP Employer Guidance** document: [Young People's Exchange Visits](#)

LA establishments are required to adhere to all relevant aspects of this guidance when organising exchange visits and homestays.

Please note that DBS checks are not normally required for host families – but host families in the UK and abroad should fill in the **Host Family Stay Information Form** (see the above guidance document – translations are available). Control measures and contingency plans outlined in this guidance should be put in place.

Refer to the British Council (Learning) [www.britishcouncil.org](http://www.britishcouncil.org)

Refer to **OEAP Employer Guidance** document: [Exchanges & home-stays](#)

Refer to **OEAP Employer Guidance** document: [Overseas visits](#)

**Overseas Expeditions:** refer to [Appendix 1 Adventure Activities & Overseas Expeditions](#)

## 23 Weather, Clothing & Survival

Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice. Participants should be adequately clothed according to:

- The time of year, prevailing weather conditions, altitude and exposure to elements;
- Likely changes in weather;
- The experience and strength of the party;
- The nature of the visit and environment.

When venturing away from immediate help, leaders should consider the need for:

- Comfort, insulation and shelter for a casualty;
- Comfort, insulation and shelter for the whole group;
- Provision of emergency food and drink;
- Torch;
- Possible need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas);

It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (e.g. Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc. Suitable qualifications for staff may be needed in order for them to support trips of this nature, Sports Leaders Basic Expedition Leader or BEL course is the minimum requirement. Course details can be found on Evolve.

## 24 Definition of an ‘Adventurous Activity’

**The following activities are regarded as ‘adventurous’ and require LA approval via EVOLVE:**

- All activities in ‘open country’ (see below)
- Swimming (all forms, excluding publicly lifeguarded pools)
- Camping
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coasteering/coastal scrambling/sea level traversing
- Underground exploration
- Shooting and archery
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Air activities (excluding commercial flights)
- Horse riding

- Motor sport – all forms
- High level ropes courses
- Off road cycling/ mountain biking
- ‘Extreme’ sports
- Other activities (eg. initiative exercises) involving skills inherent in any of the above

‘Open country’ is normally defined as land above 300m, or more than 2km/30 minutes from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the Outdoor Education Adviser, Martin Simpson (Tel: 0191 4240118, e-mail [info@simonsideoutdooradventure.com](mailto:info@simonsideoutdooradventure.com)), if you think this might apply. For level of competence required to lead in open country see [Appendix 1](#)

For further details on adventure activities refer to [Appendix 1 – Adventure Activities and Overseas Expeditions](#)

For the purposes of LA approval, the following activities are not regarded as adventurous and therefore do not require approval. However, these activities must be supervised by a member of staff who has previous relevant experience and who in the opinion of the EVC and Head of Establishment is competent to supervise the activity:

- Walking in parks or on non-remote country paths
- Field studies - unless in the environments stated in ‘open country’
- Swimming in publicly lifeguarded pools
- Theme parks
- Tourist attractions (including commercial ‘show caves’)
- Pedal go-karts
- Ice skating (rink)
- Farm visits
- Local traffic survey
- Museum, library, etc.
- Physical Education and sports fixtures (other than the above)
- Water-margin activities as defined in [Section 18](#)

Please contact the Outdoor Education Adviser if there is uncertainty over whether a particular activity requires LA approval.

## 25 Adventurous Activities

The LA acknowledges the immense educational benefits that adventurous activities can potentially bring to young people, and fully supports and encourages adventurous activities that are correctly planned, managed, and conducted. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

The responsibility for the safety of participants in an adventurous activity will rest with either:

- a) **An external provider** - see [Section 29](#)

The provider must hold an [LOtC Quality Badge](#) or complete a [Provider Form](#)

Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a ‘pastoral’ duty of care.

**or**



- b) **A member of your establishment's staff** - see [Section 28](#)  
This person must be specifically approved by the LA to lead the activity, via EVOLVE.

For further details on adventure activities refer to [Appendix 1 – Adventure Activities and Overseas Expeditions](#)

## 26 Emergency Procedures

Establishments should ensure that their Health and Safety policy includes off-site visits.

Staff involved in a visit must be aware of and adhere to their establishment's policy on emergency procedures.

For visits that take place outside normal establishment hours:

- A completed [Emergency Card – Visit Leader](#) (or equivalent) must be with the Visit Leader at all times, **and**
- A completed [Emergency Card – Home Contacts](#) (or equivalent) must be with the emergency home contact(s) at all times, where access to EVOLVE is not possible.

Refer to **OEAP Employer Guidance document**: [Critical Incident Management for Visits](#)

## 27 Accident and Incident Reporting

Establishment managers must ensure they meet the requirements of the RIDDOR regulations and good practice. Refer to South Tyneside's procedures and forms. These available in the Resource section of EVOLVE – Guidance, Policies and Documents/ Incidents

Academies must ensure they have equivalent procedures to meet the requirements of the law and good practice.

Where an incident or accident occurs on an activity led by a Provider, please ensure this is reported to the Outdoor Education Adviser Martin Simpson (Tel: 0191 4240118, e-mail [info@simonsideoutdooradventure.com](mailto:info@simonsideoutdooradventure.com)). For all other accidents or incidents then these must be reported to your corporate designated Health and Safety Advisor, for schools this is Stephen Bell 0191 4271717 or email [stephen.bell@southtyneside.gov.uk](mailto:stephen.bell@southtyneside.gov.uk) You must still fill in AR forms depending on whom the accident occurred too including staff members.

## 28 Approval of Staff to Lead an Adventurous Activity

### Procedure for Obtaining Approval

Staff who wish to **lead** (ie. supervise or instruct) an adventurous activity, as defined in [Section 24](#), must first upload details and scanned copies of all relevant qualifications (eg instructor certificates, first aid, etc) to the 'My Details' section of their EVOLVE account. Staff should update this record as required (e.g. when first aid training is renewed). The staff member should then submit a Leader Approval Request (LAR) to the LA via EVOLVE.

The visit leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (eg dates, venues, numbers, etc). The ALF will then be embedded within the Visit Form for that particular visit.



On receipt of a Visit Form (and embedded ALF), the LA will view the proposed activity in the context of the leader's competencies and qualifications.

Where approval is not granted to lead the activity, the Visit Form will be returned to the EVC via EVOLVE, with an attached note. Where this is the case the activity must not take place.

### Criteria for Approval

Approval will normally be given where the leader of the activity has recent relevant experience, is appropriately qualified through the relevant National Governing Body and holds an appropriate first aid qualification. To confirm this, the leader should submit a Leader Approval Request to the LA via EVOLVE.

In cases where no National Governing Body exists, the LA will make a decision based on factors which may include: technical advice, the leader's stated competence, observed competence, past experience, and attendance at training courses.

Approval will always be subject to a requirement that the leader must act at all times within the remit of his/her qualifications, and in accordance with National Governing Body Guidelines where these exist. Approval may also be subject to other conditions which will be specified by the LA on the Visit Form. Where there is insufficient information for the LA to make a decision regarding approval, then the applicant may be asked to provide further information (eg evidence of awards, experience, and log book details, etc). In some cases a meeting with the applicant may be requested by the LA.

Approval to lead an adventurous activity is specific to the technical aspects of the adventurous activity detailed. It is not an indication in respect of other aspects of the visit such as general management and supervision skills, the assessment of which is the responsibility of Head of Establishment and/or EVC.

For further details on adventure activities refer to [Appendix 1 – Adventure Activities and Overseas Expeditions](#).

## 29 Using an External Provider

An 'External Provider' normally provides one or more elements on an activity or visit such as instruction, staffing, guiding, or accommodation. This may be, for example:

- an Activity Centre
- a Ski Company
- an Educational Tour Operator
- an Overseas Expedition Provider
- a Climbing Wall where instruction is provided by climbing wall staff
- a Freelance Instructor of adventurous activities
- a Youth Hostel (where instruction is provided)
- a Voluntary Organisation (e.g. Scout Association), where instruction is provided

For the purposes of LA approval, an External Provider is **NOT**:-

- a Campsite
- Museums, galleries, etc
- Tourist attractions
- Theme Parks
- Farms
- a Coach, Train, or Airline company
- a Swimming Pool
- a Climbing Wall where instruction is provided by a member of your establishment's

staff with an approved Leader Approval Form (LAR) / Activity Leader Form (ALF) ([Section 28](#) applies)

## Residential Providers

You must make reasonable checks to ensure that the accommodation is suitable for your group. There should be appropriate security arrangements to prevent unauthorised persons entering the accommodation, separate male and female accommodation and washing facilities with staff accommodation close to participants' accommodation. In the UK accommodation should be: covered by a current fire certificate and / or advice has been sought from a fire officer and implemented; and a fire risk assessment has been completed. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned.

Some residential providers may hold a LOTC Quality Badge. If not it may be helpful to use the [Provider Form](#) to gather this information (and retain evidence). Alternatively you could carry out a pre-visit and take a checklist. Indicate on your EVOLVE application how you have checked out the accommodation.

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Head of establishment. The LA does not hold an approved list of external providers or tour operators. Establishments may find it useful to 'Search by External Provider' on EVOLVE, and liaise with other LA establishments that have used a particular provider. Further steps may include:

- Asking for written references from other groups if the provider is not known locally, and contacting the referees directly;
- Inviting presentations and quotations from providers offering a similar service to ensure that you are getting good value for money;
- Visiting a course being run for another group to observe standards and talk "informally" to staff from that group.

To confirm that all aspects of the operation of the provider are satisfactory, the establishment must ensure that either:

- a) The Provider holds an LOTC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**or**

- b) A 'Provider Form' has been satisfactorily completed by the provider.

Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not an LOTC Quality Badge, then a Provider Form is still required.

## For Providers that hold an LOTC Quality Badge

Check that the provider's Quality Badge will be valid on the date of your visit ([click here](#)). LA schools must ensure the provider has at least £5 million public liability (Academy staff should check their employer requirements) No further action is necessary, other than to check the suitability of the provider/venue in relation to the intended aims or learning outcomes for the particular group. A pre-visit and recommendation from previous users will help you decide on its suitability.

See [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

## For Providers that do not hold an LOTC Quality Badge

- Download a [External Provider Form](#) from EVOLVE.
- Complete the top section.
- Send Provider Form to the provider (email, fax, post).
- On its return check that it has been satisfactorily completed.
- Keep Provider Form on file together with all other relevant documentation.
- Attach a copy of the Provider Form to EVOLVE.

**Important:** The Provider Form should be sent to the provider at the time of making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.

If the Provider has made any alterations to the wording of the Provider Form or is unable to comply, then you must discuss this with the Provider, and if necessary seek advice from the LA prior to making a commitment with the Provider.

The satisfactory completion of a Provider Form does not necessarily signify that the service on offer will be appropriate for the young people from your establishment. A pre-visit and recommendation from previous users will help you decide on its suitability.

The above procedure is **not** sufficient for Overseas Expeditions (ie. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and **must** be complied with, see [\*\*Appendix 1 – Adventure Activities and Overseas Expeditions.\*\*](#)

# Appendix 1 – Adventure Activities and Overseas Expeditions

## Adventure Activities led by Council/School Employees

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## Introduction

This appendix includes specific information relating to the adventure activities which are most commonly run or organised by South Tyneside establishments. If you are planning an adventure activity for which procedures are not outlined in this section, you should follow the National Governing Body guidance for that activity including any requirements for staff competence, qualifications, safety equipment, ratios, etc. (where this is available). In the absence of such guidance, or if there is doubt, you should contact the Outdoor Education Adviser at an early stage of the planning.

The following notes are provided to make clear the range of national and local qualifications available, **and to outline the minimum standards of competence required by South Tyneside Council**. Suggested Staff/student ratios are included - but ratios should always be reviewed as part of the risk assessment. Adventure Activities and Overseas Expeditions require LA approval. Staff planning to deliver an Adventure Activity must first submit a Leader Request Form (LAR). Refer to **Guidelines for Offsite Visits and Adventure Activities**:

- [Section 25](#) Adventure Activities
- [Section 28](#) Approval of Staff to Lead an Adventure Activity

Where national or local coaching awards exist, they provide a useful benchmark for levels of technical competence, but managers/Heads **and EVCs should balance this with knowledge of the experience and competence of the member of staff to be leading the activity**. Even the most exhaustive of national qualifications is assessed in a matter of days, or at the most weeks. It is usually outside the remit of these qualifications to measure group control, or the ability to deal with difficult or disruptive young people. In many instances, these qualities coupled with a clear understanding of the leader's own working limitations, are as important to the safe running of activities as good equipment and technical competence.

**Where qualifications are specified or relevant, the Manager/Head/EVC must ensure that any employees or volunteers running activities produce evidence of their qualification** (original certificates and logbooks must be produced), and copies are uploaded onto EVOLVE. Refer to [Section 28](#) of GOVAA.

Awards held by instructors / leaders must be currently valid with the National Governing Body, including:

- Paid up membership where required
- Valid First Aid qualification where required
- Evidence of recent / current activity and or revalidation where required

## Adventure Activity Licensing

Under some circumstances providing adventure activities to under 18s without a licence can be a criminal offence. Managers/Heads and EVCs must ensure that proposed activities do not breach licensing regulations. Advice is available from the Outdoor Education Adviser.

Refer to **OEAP Employer Guidance** document: [Adventurous Activities](#)

## Open Water Swimming

**LA Approval is required via EVOLVE**. Refer to [Section 28](#) Approval of Staff to Lead an Adventure Activity

Local advice must always be sought.

For free swimming activity

- A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see [www.lifesavers.org.uk](http://www.lifesavers.org.uk) Note: this is for beach/sea only, not inland water. **or**

#### For structured or programmed activity

- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. (available from 2012) see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

Refer to **OEAP Employer Guidance** document: [Open Water Bathing](#)

## **Hotel (and other) Swimming Pools without lifeguards**

Establishments should check the lifeguarding position in advance.

LA Approval is not required for this activity if qualified lifeguarding is provided at the pool.

If lifeguarding arrangements are not provided at the pool then the visit leader will bear the full responsibility for ensuring swimming safety, and approval to lead the activity will be required via EVOLVE. Refer to [Section 28 Approval of Staff to Lead an Adventure Activity](#).

The following awards/qualifications apply:

#### For free swimming activity

- A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

#### For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see [www.lifesavers.org.uk](http://www.lifesavers.org.uk) **or**
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

Staff must be aware of the procedures in the event of an emergency, and who at the venue will provide back up. Staff should also know if they have exclusive use of the pool, as other pool users may increase the supervision role of your lifeguard.

If a young person holds an appropriate qualification then their role should be emergency lifeguard action, and supervision should remain the responsibility of the LA establishment's staff.

## **Canoeing and Kayaking**

### **National Governing Body**

The British Canoe Union

### **Relevant Qualifications**

Administers a wide variety of coaching qualifications, which are relevant to different circumstances:

Coach Level 1  
Coach Level 2  
Coach Level 3  
Coach Level 4  
Coach Level 5

These qualifications are available in 3 basic types of craft (Kayaks, Open Canoes and Placid Water Open Cockpit Kayak). They are also split between inland and sea for kayaks. Advice is available from the BCU or the Outdoor Education Adviser.

**Canoeing activities must be run by staff/instructors with appropriate B.C.U. qualifications.** They must be operating within the remit of their award: advice is available from the BCU or the Outdoor Education Adviser.

## Sailing

### National Governing Body

The Royal Yachting Association

### Relevant Qualifications

Instructor

Senior Instructor

There are separate qualifications for tidal areas.

Staff running sailing activities must hold current RYA qualification(s). They must be operating within the remit of their award: advice is available from the RYA or the Outdoor Education Adviser.

## Open-Country Activities

The LA acknowledges the immense educational benefits that open-country activities can potentially bring to young people, and fully supports and encourages open-country activities that are correctly planned, managed, and conducted.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

For the purposes of LA approval, 'open-country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the LA if you think this might apply.

Open-country activities are regarded as 'adventurous' and therefore these visits require LA approval.

The responsibility for the safety of participants in an adventurous activity will rest with either:

- a) **An external provider** - see GOVAA [Section 29](#).

The provider must hold an [LOtC Quality Badge](#) or complete a Provider Form

Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

**or**

- b) **A member of your establishment's staff** - see requirements below.

This person must be specifically approved by the LA to lead the activity, via EVOLVE.

**The following minimum levels of technical competence apply where a member of the establishment's own staff intends to lead an open-country activity**



# Walking (including Hill Walking, Fell Walking, Rambling, etc.)

## National Governing Body

The Mountain Walking Leader Training Boards [www.mltuk.org](http://www.mltuk.org)  
Sports Leaders UK (SLUK).

## Relevant Qualifications

### SLUK Basic Expedition Leader (BEL, previously BELA: formerly BETA!)

A basic qualification for Leaders wishing to take groups walking or camping in rural areas, during the summer months, i.e. the end of March to the end of October (NB. does not include hill walking). The BEL award is a suitable training programme for staff wishing to lead groups in the low level areas around Oldham, and in other similar areas, using well marked footpaths without technical difficulties. If staff do not hold this qualification they must be able to demonstrate a comparable level of experience and technical competence

### Lowland Leader Award

The Lowland Leader award has been designed for people who wish to lead groups on day walks in lowland countryside and woodland in summer conditions [Lowland Leader Award](#)

### Hill and Moorland Leader

The Hill and Moorland Leader award is designed for people who want to lead groups in the hill and moorland areas of the UK and Ireland. This award is a wonderful opportunity to learn the leadership skills required to feel confident about taking people out walking. As you may have guessed from the descriptive title of this award, it focuses on non-mountainous terrain.

In a previous life this award was called the [Walking Group Leader](#), and we think the new name better describes the award and makes more sense. This way, everyone knows where they (can) stand. The 'overnight experience' element of the WGL has been removed and we've created a separate [Expedition Skills Module](#) which can be 'bolted on' to the Hill and Moorland Leader (or indeed the Lowland Leader) if you want to increase the scope of your award to include multi-day expeditions. [Hill and Moorland Leader](#)

### Mountain Leader Award (ML)

This award is intended for those who take groups walking and camping in hills and mountains during the summer months, where the use of ropes is not envisaged. Includes movement on steep ground, and leadership on this terrain. [Mountain Leader Summer](#)

### Winter Mountain Leader Assessment

This is a separate course, which assesses leaders in the more arduous conditions which can be found in winter, including movement on snow and ice. [Mountain Leader Winter](#)

### Mountain Instructor Assessment (MIA), Mountain Instructor Certificate (MIC)

These awards both have the summer ML as a prerequisite, but they require additional rock climbing and mountaineering skills. The latter award also requires the winter "ML" and includes winter climbing on snow and ice. [Mountain Instructor Certificate](#)

**For hillwalking (excluding low level walks on well marked public footpaths without technical difficulties) the member of staff/instructor must hold the appropriate MLTUK qualification. They must be operating within the remit of their award: advice is available from MLTE or the Outdoor Education Adviser.**

# Rock Climbing (including climbing walls and abseiling)

## National Governing Body

The British Mountaineering Council and Mountain Leader Training Boards

## Relevant Qualifications

### Climbing Wall Award (CWA)

Remit is artificial climbing walls, with separate endorsements for teaching abseiling and lead climbing.

### Climbing Wall Leader Award (CWLA)

This award trains and assesses candidates in the skills required to teach lead climbing skills on indoor or outdoor artificial climbing walls and structures with fixed protection. It builds on the skills gained through either the Climbing Wall Award or Single Pitch Award, one of which candidates must hold to access the Climbing Wall Leading Award scheme.

### Single Pitch Award (SPA: formerly SPSA)

Nationally recognised qualification for instructing rock climbing on climbing walls and suitable single pitch crags.

### Mountain Instructor Award (MIA)

This requires the summer ML Award as a prerequisite. It includes lead climbing and multi-pitch climbing as well as top roping.

### Mountain Instructor Certificate (MIC)

This requires the Summer and Winter ML Awards and involves lead climbing, top roping, and winter snow and ice climbing.

Staff running rock climbing or abseiling sessions requiring the use of ropes must hold the appropriate MLTE qualification. They must be operating within the remit of their award: advice is available from the MLTE or the Outdoor Education Adviser.

## Abseiling

Staff supervising abseiling should be qualified to the standards outlined above (Abseil module required for CWA).

# Snowsports

The LA acknowledges the immense educational benefits that snowsport activities can potentially bring to young people, and fully supports and encourages snowsport activities that are correctly planned, managed, and conducted.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires LA approval through EVOLVE.

There are advantages to snowsports taking place during term time as opposed to during the establishment holiday period. These include: greater choice generally, less queuing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snowsport establishment instructors (as opposed to 'casual' instructors), greater likelihood of English speaking instructors, considerable cost savings through avoiding high season (possibly allowing more young people to participate), etc.

A member of staff intending to organise a snowsport visit (but not instruct, lead or supervise on snow) must hold the Snowsport Course Organiser Award (SCO), administered by Snowsport England

[www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) and must have previously accompanied at least one educational snowsports visit. It is good practice for staffing to include one or more Alpine Ski leader.

Young people may only participate in snowsports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports school. Establishments should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day. A member of staff intending to lead skiing or snowboarding (i.e. not using a ski school instructor) must be qualified as below and have been approved by the LA via EVOLVE- see [Section 28](#)

**Skiing:** The minimum qualification to lead skiing on snow is:

- The Alpine Ski Course Leader Award (ASCL) [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) **or**
- The Alpine Ski Leader Award (ASL) [www.snowsportscotland.org](http://www.snowsportscotland.org)

**Snowboarding:** The minimum qualification to lead snowboarding on snow is:

- The Snowboard Leader Award (SBL) administered [www.snowsportscotland.org](http://www.snowsportscotland.org)

Young people must not participate in off-piste activities.

## Helmets

**The wearing of helmets is required by all participants including staff. In practice this means:**

- All participants and staff must have approved snowsport helmets.
- Helmets should normally be worn during snowsport activities, and **must** be worn when local laws or regulations dictate this.
- In specific circumstances, based on risk assessment instructors / staff may determine that they are not required. A risk assessment might indicate that the wearing of a helmet was unnecessary and would or might interfere with the activity. For example, a helmet would not be required for cross-country skiing (langlauf, ski de fond). Helmets might not be required by staff without skis assisting people on or off uplift or “collecting” a group at the bottom of a nursery area. This may also be true for complete beginners learning in a segregated, gentle area through which faster skiers and snowboarders could not pass. If in doubt, helmets should be worn.

Helmets must be correctly fitted and appropriate for purpose. Staff should learn how to fit helmets so that they become competent and are able to spot if they are being worn incorrectly. Where helmets are rented, they should be fitted by the person renting the equipment to you (as are skis etc). If a parent supplies the helmet, they are responsible for it being in a serviceable condition (at the start of the snowsports tour at least) and fitting correctly. Staff should still check this.

It is possible that hire shops/tour operators will not have sufficient stocks of helmets in place so it is essential to discuss this with them in plenty of time so that adequate stocks can be made available. If you are arranging equipment rental in the UK it is useful to book helmets as part of this package to ensure all participants have suitable helmets. If not, contact your tour operator to ensure all participants will be provided with suitable helmets as part of the equipment package. Provision of helmets should be ‘costed’ as part of the overall package, not as an optional extra.

**Important:** Some resorts in USA or Canada may have unacceptable **liability waiver requirements**. The establishment must check the liability position prior to making a commitment, and should seek advice from the Outdoor Education adviser before booking. All ski companies should be required to fill in and sign the [Provider Form](#) - this obliges them to declare if waiver statements are required.

## Dry slope skiing and indoor slopes with artificial snow

Training on artificial slopes is often used as a preparation for ski trips, and may be used as an activity in its own right. Students should receive instruction from qualified staff (minimum qualification Club instructor). Instructors can normally be booked in advance at most slopes. The maximum group size should be 10. It is recommended that a member of staff should accompany lesson groups (or if not, observe the lesson to ensure appropriate behaviour).

**Clothing**

Helmets are highly recommended – check on availability before booking.

Tumbles on dry slopes can be painful and students should wear thick trousers and have their arms covered.

Gloves or mittens should be worn. Thick socks should be taken.

**Supervision by staff**

Students who have/are receiving qualified instruction may be supervised during additional practice sessions after lessons, by staff who are experienced skiers provided the participants all meet the standards of competence required by the venue. The maximum number of students in such a group should be 5.

Students should not be allowed to ski alone.

# Camping and Campcraft

Camping may be an end in its own right, or it may provide cheap residential accommodation and the means to engage in other activities. There is no specific National Governing Body but the following qualifications provide useful training and experience of camping:

- **The Basic Expedition Leaders award (BEL)**
- **The Lowland Leader or Hill and Moorland Leader**
- **The Summer Mountain Leader Training Scheme (ML)**

**It is particularly important that a qualified first-aider is available during camping trips.**

## Group Size

One instructor should not supervise more than ten camping. Both male and female staff should normally supervise mixed groups.

## Before any trip

Training should be given in erecting the tents and **especially in the safe use of stoves.**

Permission should be sought to camp.

Communal equipment should be fully checked as well as personal equipment.

## Emergency Equipment

A first-aid kit must be available and should contain burn dressings.

**There is a high fire risk from cooking in tent doorways and this should usually not be permitted**

## NOTE

Staff responsible for purchasing tents should consider buying tents with entrances at each end, because of the additional safety they provide in case of fire.

Staff should be aware of the dangers involved in refilling Trangia stoves with methylated spirits, and from changing Camping Gaz cylinders. Stoves requiring the gas cylinder to be punctured should not be used (i.e. gas cylinder/bottles should be resealable).

Where appropriate, fuel for stoves should be held by the leader/instructor, who should supervise the refuelling of stoves.

If Duke of Edinburgh's Award groups are camping unaccompanied they should be visited at least once in the evening or morning.

# Orienteering

## National Governing Body

British Orienteering Federation (BOF)

## Relevant Qualifications

BOF Teacher/Leader

BOF Instructor

1. Orienteering is an activity which can be run at a variety of levels from a school playing field to mountains in wild country areas. Clearly the experience and expertise required of staff will increase with the demands of the terrain, and of course the progress of the group. (At a low level in a familiar area, suitably experienced staff may need no additional qualifications).

2. Staff should be wary of sending individuals off on their own particularly in parks and other open areas in the town. Depending on the circumstances it may be more appropriate to organise the groups into pairs or larger groups. Whistles should be issued for emergency use, particularly in wild country areas.

3. On rugged terrain or in wooded areas participants must wear full leg and arm cover. Footwear should be appropriate to the circumstances.

## Mountain Biking (and Off Road Cycling)

### National Governing Body and Relevant Qualifications

There is no one body nationally recognised as the “Governing Body” for mountain biking instruction. British Cycling is the National Governing Body for Cyclesport which includes MTB, however, there are other organisations such as [CTC](#) and [MIAS](#) that also offer training and assessment which have wide recognition. British Cycling offer Levels 1-3 in mountain bike instruction [British Cycling MTB leadership](#)

Staff who wish to lead sessions either on or off road will have to have some form of training and assessment process either by an NGB Award or in house qualification which has been assessed by a competent technical advisor. This will either be approved by the Head of the establishment or LA through Evolve.

The British Cycling Federation offers advice on touring, etc.

1. Cycling on busy roads is hazardous, particularly with large groups. Routes should be selected to avoid main roads, and all roads if possible. If roads must be used then participants should cycle in single file, if possible with a member of staff at the front and back of the group.
2. Helmets are required at all times.
3. Bikes should be maintained in good condition and checked before use.
4. Although there are many suitable routes in the South Tyneside area, staff should be aware that there is not an automatic right of way for cycling on public footpaths or mineral lines. (Public roads and bridleways can be used. Access should be checked where necessary. Group leaders should be conscious of the erosion which can be caused by mountain bikes, and avoid sensitive areas.

### Staff Ratio

At least 1:8. It is recommended to have two staff with the group especially on roads and in wild country.

## Combined Water/Rock Activities (and other Hybrid Activities)

This category encompasses a wide range of activities and environments each with their own level of objective danger. A number of highly publicised accidents have occurred involving hybrid water / rock activities, and they require careful planning combined with judgement and experience. There is no single NGB qualification relevant to these activities, but certain Awards will be more or less relevant, depending on the specific environment. For activities involving movement on steep rock, and/or use of ropes, rock climbing or mountaineering qualifications may be appropriate, but for some gorges, knowledge of caving techniques may be more relevant. Expertise in white water canoeing may enable more effective ongoing risk assessment of water hazards.

The HSE has produced an information sheet [‘Combined water and rock activities: Guidance for providers’](#) available from:

[www.hse.gov.uk/pubns/etis13.pdf](http://www.hse.gov.uk/pubns/etis13.pdf)

As there is no single NGB qualification appropriate to all hybrid activities, leaders must hold relevant related qualification(s), supplemented by 'in house' site specific approval following appropriate training, with assessment and certification from an 'in house' expert.

Where combined water/rock activities are planned, ample advanced notice should be given to the LA to ensure that these requirements have been met.

## Diving

Diving activities must be delivered by a reputable contractor with HSE approved diving qualifications e.g., PADI, BSAC, NAUI. Diving instructors must have an annual diving medical and be passed fit to dive. The contractor must complete the Diving Contractor's Declaration form below.

All activities and procedures must conform to the [HSE Approved Code of Practice \(ACOP\) for Recreational Diving Projects \(L105\)](#). The Dive Plan and Risk Assessment must be available for inspection.

### Ratio

For open water, the ACOP requires the minimum size of the dive team (excluding students) to be three: (one on the surface and two in the water). The person on surface watch has a key role in the event of an emergency, and this person must be:

- Competent
- Well briefed
- Familiar with the dive plan
- Able to raise the alarm and summon further assistance

The instructor/ student ratio should be determined by the dive risk assessment and project plan, but should not exceed the recommended levels of the appropriate diving organisation. It must take account of the age and experience of the students.

Leaders of school/youth groups should note that the maximum group sizes and ratios permitted by some diving organisations can be relatively high and this is an aspect of 'quality', which may be partially affected by commercial pressures rather than just risk assessments based on prevailing conditions. Low instructor to student ratios (less than 1 to 4) and a competent well-briefed surface watch are major factors in the quality and safety of initial dives with young people. The maximum group size and ratio should be clarified and agreed prior to booking.

Whilst the HSE ACOP is not enforceable abroad, it forms a useful basis for checking the suitability of overseas providers, and is a model of best practice.

If teachers or other LA staff are to take part in diving activities, then technically they are 'diving at work' and it is good practice for them to have a diving medical.

Equipment must be maintained by a competent person in accordance with the Approved Code of Practice and servicing should be recorded.



## Sub Aqua Provider Questionnaire

Provider \_\_\_\_\_ School/Group \_\_\_\_\_

1. Will all sub aqua activities undertaken comply with the Approved Code of Practice (Recreational Diving Projects, HSE 1998)? \_\_\_\_\_

2. Is diving equipment serviced in accordance with the manufacturer's service schedule (and any relevant national or international standards) and have cylinders been tested for fitness for use in accordance with regulations? \_\_\_\_\_

3. Is all maintenance carried out by a competent person? Are written records of inspection and maintenance kept, and available for inspection? \_\_\_\_\_

4. Do all members of the dive team hold HSE approved diving qualifications at an appropriate level for the planned activities? \_\_\_\_\_

5. Which governing body will the dive team operate under? \_\_\_\_\_

6. What will the size of the dive team be (excluding students)? \_\_\_\_\_

7. Will the dive team include any members of the school / group staff? (If so, state their role) \_\_\_\_\_

8. Have all members of the dive team had a Diving Medical within the last 12 months, and been passed fit to dive? \_\_\_\_\_

9. What will the ratio of diving instructors to students be? \_\_\_\_\_

10. Will a competent well-briefed person be on surface watch (for open water dives)? \_\_\_\_\_

11. Will the surface watch be a member of your staff team? \_\_\_\_\_

12. Has any formal enforcement action been taken against you? \_\_\_\_\_

13. How long has your company been in operation? \_\_\_\_\_

14. How long have the instructors, who will be working with the young people, been in your employment in their present capacity? \_\_\_\_\_

15. About how many young people have undertaken diving courses with your company previously? \_\_\_\_\_

16. What award will the young people be working towards? \_\_\_\_\_

Please return this form together with the Dive Plan and Risk Assessment for the training programme.

# The Duke of Edinburgh's Award Scheme

The guidelines in this document apply to all groups in South Tyneside running D of E activities under the “umbrella” of the LA operating licence (regardless of whether the LA is the employer).

The sections of The Scheme to which the guidelines apply are primarily the Expedition section and the Physical Recreation Section.

The requirements of the D of E Scheme include an assessed expedition at each level of the Award where the participants are expected to journey unaccompanied. The participants are never unsupervised, and supervision of a group journeying on their own may take one or more of the following forms, depending on the group, the terrain, and the weather conditions.

1. Meeting staff at pre-arranged points.
2. Telephoning a pre-arranged number from a telephone box en route, or possibly using a mobile phone if signal strength has previously been verified.
3. Leaving a written progress report in a check-tin at a pre-arranged point on the route, (to be checked regularly).
4. ‘Shadowing’ or observation from some distance away.

The Handbook for the scheme outlines the training which all participants must receive before the assessed expedition, and the training and practice ventures should be designed to ensure that participants progressively develop experience, skills and self-reliance.

**At Bronze level** the expedition takes place in “normal country” and leaders and instructors should have appropriate skills, experience and training. The B.E.L. or Lowland Leader award is recommended as an appropriate programme for preparing staff for training and supervising participants at this level.

**At Silver level** the D of E Handbook states: -

“Silver ventures should take place in normal rural, or open country....Although Silver Expeditions in wild country areas are not expressly forbidden, all participants must be trained and equipped to a standard sufficient to enable them to meet any hazards which they may encounter. The requirements and syllabus of the Gold level must be utilised if the ventures takes place in wild country. Wild Country Panels must be notified.”

Where Silver expeditions do not take place in wild country the recommendations given above (for Bronze ventures) apply. Where Silver expeditions take place in wild country and for **Gold level expeditions**, the following rules apply: -

1. For low level (valley bottom) routes following well defined paths avoiding remote areas, scree slopes, exposed ridges, etc. the supervisor be may a competent leader who has completed a Hill and Moorland Leader's Award or Summer ML Award), and has suitable experience of supervising and organising groups.
2. For other routes in wild country areas the leader should have completed either the Hill and Moorland Leaders Award or the Summer Mountain Leader Assessment depending on the nature of the terrain (see section on hillwalking for clarifications). The qualified leader may be assisted by appropriately trained and experienced helpers in monitoring and supervising a group or groups involved in a practice expedition or assessment venture. (The Summer ML Training course is recommended as an appropriate programme for preparing staff to assist with training and supervision of participants at this level.) However the number of qualified instructors should be such that in the event of a problem requiring intervention by staff, it is possible for the co-ordinator to ensure that prompt assistance is available from a qualified member of staff. (The qualified member or members of staff must be on hand in the area, and it must be clear that they are responsible for any helpers and assistants.)

## Supervision of Campsites

(This section relates to all forms of expeditions including cycling, canoeing and horse riding as well as walking.)

The level of supervision required at campsites will vary depending on a number of factors.

1. The age and experience of the group.
2. The location of the campsite and whether there are other groups or individuals using it.
3. Other factors relating to the group including male/female balance, ethnic origin, special needs, etc.

Where campsites are unsupervised they should be visited in the evening and morning.

If the camp is supervised i.e. if staff are camping on site, mixed groups must be supervised by a male and female member of staff.

## Expeditions on water: Canoeing

For canoeing ventures, the D of E Handbook requires that participants are trained to the following B.C.U. levels:

	<u>Kayak</u>	<u>Open Canoe</u>
Bronze	2 Star	2 Star plus rescue of capsized canoe
Silver	2 Star	2 Star plus rescue of capsized canoe
Gold	3 Star (White Water, Sea or Surf)	3 Star (Canoe)

Participants should receive instruction from, and be assessed for the appropriate level of award by a B.C.U. qualified instructor. The minimum qualifications are:

BCU Level 2 Coach (Inland Kayak & Canoe) for 2 Star;  
BCU Level 3 Inland Kayak Coach for 3 Star White Water;  
BCU Level 3 Sea Coach for 3 Star Sea;  
BCU Level 3 Surf Coach for 3 Star Surf.

## Supervision of expeditions on water

The handbook specifies that if coastal waters are used (Gold only) then

“The Supervisor should be on the water with the participants and be appropriately qualified.”

In this context, appropriately qualified means B.C.U. Level 3 Coach (Sea) although under certain conditions Level 3 Coach (Inland Kayak) may be adequate. (Take advice from the B.C.U. or the Outdoor Education Adviser if in doubt.)

In many cases when the assessment venture takes place on canals, rivers or other inland waterways it will not be necessary for the supervisor to be on the water continuously throughout the period of the expedition. However, depending on the nature of the water used it may be necessary for the supervisor to be on the water and on hand when the group encounter specific hazards (e.g. negotiating a rapid on an otherwise flat section of river). In certain circumstances it may be necessary for the supervisor to shadow the group for longer periods (for example on some inland waters it is possible for the group to be more than a kilometre from the nearest land, and in these circumstances change in the wind can rapidly produce difficult or hazardous conditions).

The supervisor for training or assessment ventures must be qualified in accordance with B.C.U. guidelines. They must be appropriately prepared and equipped to provide assistance if this becomes necessary.

## Land ventures: Cycling

The Handbook states that participants should be trained:

“to the standard of the Cycleway Proficiency Test. Loading a cycle with Expedition equipment.  
Handling a loaded cycle.”

Participants should be assessed for the Cycleway Test by an appropriately qualified person. Trainers should refer to the advice in the Expedition Guide and ensure that participants are well prepared for the additional hazards involved with riding a heavily laden cycle on narrow country lanes.

## Physical Recreation Section

Where adventure activities take place, they must be run in accordance with South Tyneside's Guidance for Offsite Visits and Adventure Activities (GOVAA).

## Overseas Expeditions

The LA acknowledges the immense educational benefits that overseas expeditions can potentially bring to young people, and fully supports and encourages overseas expeditions that are correctly planned, managed, and conducted.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

Overseas Expeditions (for the purposes of this document) are defined as those which typically involve journeying in remote areas of the world and/or in developing countries.

There are stringent requirements on Overseas Expedition providers, and establishments may therefore need to allow **up to 18 months for LA approval to be granted**. A 'Note' (for the attention of the LA) should be added to the EVOLVE Visit Form as soon as possible during the planning stages.

Overseas Expeditions will only be approved by the local authority if the provider either:

- a) Holds an LOTC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) **or**
- b) Provides a statement of compliance with [\*Guidance for Overseas Expeditions, Edition 3\*](#)

The contract for the expedition **must** be with the school not direct with parents (refer to Section K: Contracts and Legal Issues, of the above guidance).

For providers that do not hold an LOTC Quality Badge, 'Guidance for Overseas Expeditions, Edition 3' should be referred to when the proposal is initiated. This document contains information for both establishments and providers, and includes a checklist of vital aspects that **must** be considered prior to the establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

When planning an expedition and selecting a provider, establishments should particularly consider the educational aims of the venture, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met.

Visit leaders may find it beneficial to attend the one day course entitled 'Overseas Expeditions and Fieldwork: a Course for Teachers and Youth Leaders' organised by the Royal Geographical Society [www.rgs.org/eac](http://www.rgs.org/eac)

## South Tyneside Council, External Provider Form

When considering using commercial, charitable, private facilities or a tour company for the provision of off-site visits, South Tyneside Council affiliated organisations are required to seek assurances that the provision complies with South Tyneside Council and government guidelines. This form is designed to assist schools/organisations in gaining written assurances from providers. The party leader must ensure that this form is completed as part of the planning and risk management process for their visit. Ideally, this form should be completed during a pre-visit. **This form is not necessary if providers hold a LOTC Badge which is in date.**

Name of School / Centre \_\_\_\_\_

Location & Dates of visit \_\_\_\_\_

### PROVIDER DETAILS

Name \_\_\_\_\_

Address \_\_\_\_\_

Tel \_\_\_\_\_ Fax \_\_\_\_\_ E mail \_\_\_\_\_

**To the Provider:**

Some of these sections will apply to you as the provider, others will not, please fill in all that are relevant to your organisation or the service that you are providing.

<b>GENERAL</b> To be completed by all providers	✓/x
Staff assigned to work with the group will be appropriately qualified and experienced for the programme and hold an enhanced DBS check	
The provider complies with relevant safety regulations including the Health and Safety at Work Act 1974 and associated regulations for visits taking place in the UK, and has a health and safety policy and recorded risk assessments which are available for inspection.	
Accident and emergency procedures are maintained and records are available for inspection.	
There is public liability insurance cover to the value of (min. req. £5 million)	£
First aid arrangements are in place and relevant staff hold current first aid qualifications	
Written operating procedures are available for inspection and cover the following: Safety management systems, Clearly defined accident and emergency procedures, Assessment of staff competence	
Division of responsibilities between provider and visiting staff and clear hand over and hand back arrangements	

<b>ACCOMMODATION AND CATERING</b>	
Premises are covered by a current fire certificate OR they are exempt but there is a up to date fire risk assessment	
The premises are covered by a certificate of compliance under the electricity at work regulations 1989	
All portable electrical equipment is tested annually	
Gas installation and gas soundness test reports are in date	
There has been an asbestos survey or the building is certified free of asbestos	
Warm water storage systems comply with COSHH regulations on control of Legionnaires Disease	
Any catering staff are at least qualified to food hygiene certificate standard	

<b>TRANSPORT</b>	
Coach transport is covered by operators licence number	
Any minibuses are covered by an operators licence or a section 19 permit	
Adjustable diagonal and lap seatbelts are fitted to all seats and kept in good order	
All vehicles and trailers comply with existing regulations, are maintained in a roadworthy condition and are appropriately insured	
Vehicle drivers are appropriately qualified and adhere to drivers hours regulations	

<b>ADVENTUROUS ACTIVITIES &amp; FIELD STUDIES IN OUTDOOR ENVIRONMENTS</b>	
<b>The centre holds an AALS licence – number</b>	
<b>For all licensable activities in the UK, the specifications in this section are checked as part of an AALS inspection. However, providers registered with AALS are asked to consider these specifications with respect to any activities or aspects of their provision to the visiting establishment not covered by the licence.</b>	
The provider operates a policy for staff recruitment, training and assessment which ensures that staff with a responsibility for participants are competent to undertake their duties.	
The provider maintains a written code of practice for activities which is consistent with relevant National Governing Body (NGB) guidelines and/or, if abroad, the relevant regulations of the country concerned.	
Staff competences are confirmed by possession of appropriate NGB qualifications for the activities to be undertaken, or staff have had their competences confirmed by an appropriately experienced and qualified technical adviser.	
Where there is no NGB for an activity, operating procedures and staff training and assessment requirements are explained in the provider's code of practice.	
Participants will at all times have access to a person with a current first aid qualification. Staff are practised and competent in accident and emergency procedures.	
There is a clear definition of responsibilities between providers and visiting staff regarding supervision and welfare of participants.	
All equipment used in activities is suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary.	

**Where a tour operator delivers services to schools/social/youth establishments using other providers e.g. ski schools, transport operators or accommodation, the tour operator must ensure that each provider meets the relevant specifications outlined in other sections of this form and that these providers operate to standards which meet the relevant regulations which apply to the country of operation.**

<b>TRAVEL COMPANIES / TOUR ORGANISERS/ EXPEDITION PROVIDERS</b>		
The package includes a flight element		
The provider is covered for the <u>whole</u> package by ATOL number		
Provide the name and licence number of any bonding bodies you are a member of (e.g. ABTA)		

I confirm that the answers given above are accurate and that all licences, operating procedures, risk assessments and records referred to are up to date and available for inspection if required.

Name \_\_\_\_\_

Position in Organisation \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

## PRIVATE CAR FORM

### Use of a private car to transport young people

<b>1</b>	To: The Head of _____ Establishment
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I confirm that I am willing to use my own vehicle for transporting young people on educational visits. I accept responsibility for maintaining appropriate insurance cover (see below). I have a current valid driving licence and will ensure that my vehicle is legal and roadworthy in all respects. My vehicle is fitted with seatbelts, and I will ensure that young people use these. I will comply with the Child Restraint and Car Seat Regulations, and ensure that children under 12 or 135cm use a booster seat if required.

<b>2</b>	Signed: _____ Print name: _____
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<b>3</b>	Address: _____ _____ _____ _____
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<b>4</b>	Date: _____
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The LA and the establishment reserve the right at any time to request copies of any relevant documentation i.e. Registration Document, MOT, Insurance, Driving Licence

	Insurance cover required
For teachers, youth workers, or other LA / establishment employees	<i>'Use by the Policyholder in connection with the business of the Policyholder'</i>
For parents and other volunteers	<i>'Use for social, domestic and pleasure purposes'</i>



## USE OF NON-PRESCRIPTION MEDICINES ON SCHOOL RESIDENTIAL VISITS

(insert school name and address)

Dear Parent,

During our forthcoming residential visit to ....., we will be taking every precaution to ensure the health, safety and welfare of your child. All foreseeable hazards have been risk assessed and measures put in place to minimise any remaining risks.

However from time to time, children do become ill on school visits (usually during the night!) and as we retain 'duty of care' throughout the visit, we would not wish to see a child suffering as a result of minor, but distressing ailments such as headaches, stomach upsets, bites and stings.

With this in mind, we would request that you give your consent to the group leader administering non-prescription medicines on the visit. **This would be limited to medicines available 'over the counter' from chemists and given in the recommended dosages as stated on the packaging.**

We intend to take the following medicines with us and therefore we ask you not to send your child with any non prescription medicines:

Permission given? (Please tick)				
Paracetamol	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Pills for diarrhoea	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Insect bite and sting cream	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Adhesive plasters	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Antiseptic cream	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Please note that we are not permitted to use aspirin.

Please sign and return this letter, having indicated which of the above items (if any) you wish your child to be given, if required.

Any such medicines administered will be recorded and details supplied to you on our return and of course, professional medical advice will be sought if appropriate.

Please note that if your child will need to bring any prescription medicines these must be properly packaged and labelled, with information regarding prescribed dosages and times, and given to the group leader.

Yours sincerely,

Visit to \_\_\_\_\_

I give/do not give permission for my child ..... to be given medicines as indicated above should a member of school staff deem it beneficial to his/her health, safety and welfare. (Please delete as necessary)

Signed \_\_\_\_\_ Parent/Guardian

Date \_\_\_\_\_

# Emergency Card (Home Contacts/Designated Person)

For visits that take place outside normal establishment hours.

**This 'card' or equivalent must remain with the establishment emergency contact(s) at all times, if access to EVOLVE is not possible.**

The establishment's Emergency Home Contact(s) should have all visit information, including itinerary, venue details, names, medical information and emergency contact details for all participants including staff.

In the event of being contacted by the Visit Leader (or other member of staff involved in a visit), you should:

- Confirm the phone number (s) at which the caller can be contacted back on;
- Note their location;
- Determine the nature of the emergency;
- Determine the type of help required.

**If the incident does not involve serious injury or fatality, and/or is not likely to attract media attention and is classed as a minor incident then:**

- Provide the required assistance if possible;
- Seek further advice or pass on details to other establishment contacts who may be able to assist.

**If the incident does involve serious injury or fatality, and/or is likely to attract media attention and is classed as a major incident or disaster then:**

- Inform the Visit Leader that someone will phone him/her back within 30 minutes;
- 

**It is the responsibility of the Visit Leader to contact the LA. However circumstances may prevent this. If you are not 100% positive that the LA has been contacted, please contact South Tyneside Council 0191 455 5523 and state that you require immediate assistance from the Off Site Visits Emergency Response Team. Give brief details of the incident.**

- You should also contact the Head of Establishment (if this is not you);
- The Head of Establishment should consider the appropriate time to contact the parents of the participants involved on the visit. Advice and support can be sought from the LA in dealing with this.
- The Response Team will form a continuous link with the affected group, and depending on the level of emergency will send a senior officer to the incident location. The Response Team will direct all actions; provide links with the media, rescue agencies, tour operators, insurance companies, etc. As appropriate the Response Team would arrange for the return of the party or arrange other transport where required;
- You will be provided with a dedicated number to refer all press, media, parental, or other enquiries to the LA and for continuing contact with the LA during the incident.
- The LA will give accurate and periodic information through press releases, will arrange interviews, and will attempt to reduce media pressure from the incident, establishment, and parents. If appropriate, support and counselling will be arranged for families, participants and staff.

Name	Home	Mobile
Head of Establishment		
Deputy Head of Establishment		
South Tyneside Council Emergency Call Centre (for <b>initial</b> contact during an emergency only)	<b>0191 455 5523</b>	-

Chair of Governing Body (optional)		
Other/EVC		

# Contacts

<b>EVOLVE</b>	<a href="https://evolve.edufocus.co.uk">https://evolve.edufocus.co.uk</a>
<b>Outdoor Education Adviser</b>	Martin Simpson 0191 4240118 Alex D'Ambrosie 0191 4240118 <a href="mailto:info@simonsideoutdooradventure.com">info@simonsideoutdooradventure.com</a>
<b>Health &amp; Safety Adviser</b>	Stephen Bell 0191 4271717 <a href="mailto:stephen.bell@southtyneside.gov.uk">stephen.bell@southtyneside.gov.uk</a>
<b>Insurance questions</b>	Clare Whiteley 0191 424 7652 <a href="mailto:Clare.whiteley@southtyneside.gov.uk">Clare.whiteley@southtyneside.gov.uk</a>
<b>LA Emergency Contact for visits (24 hour)</b>	<b>0191 4555523</b>

**OEAP Employer Guidance** <http://oeapeg.info/>

**National Library** [www.national-library.info](http://www.national-library.info)

**LOtC** [www.lotc.org.uk](http://www.lotc.org.uk)

**LOtC Quality Badge** [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**Outdoor Education Advisers' Panel** [www.oeap.info](http://www.oeap.info)