

Guidance for **O**verseas **E**xpeditions

GOE Edition 4

2014

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1 Outline of GOE (Edition 4) & Target Audience

GOE (Edition 4) is an 'enabling' document which sets out minimum standards for expeditions, which are sensible, robust, and in line with current good practice.

The target audience for GOE (Edition 4) is:

- any school or youth group, *and*
- its employer (eg local authority, governing body, proprietor, etc.), *and*
- the intended Overseas Expedition Provider (including charitable organisations).

GOE (Edition 4) recommends that, regardless of any other accreditations or declarations, schools should choose a Provider that holds an LOTC Quality Badge (for Overseas Expeditions), as these providers will have been inspected and externally accredited.

GOE (Edition 4) supports the existing documentation, systems and procedures that are in place within the target audience.

It is recommended that users also consider Outdoor Education Advisers Panel 'National Guidance' www.oeapng.info which is endorsed by HSE, teacher unions and other organisations.

Background to GOE (Edition 4)

GOE (Edition 4) 2014 has been prepared by Clive Atkins through updates of previous editions (2004, 2007, & 2008), and by taking account of:

- developments in current good practice and national guidance;
- advice and feedback from schools, youth groups, and local authorities;
- advice and feedback from several Overseas Expedition Providers;
- advice and feedback from other organisations, and individuals.

The original 2004 document, GOE (Edition 1) had its roots in the following:

- Outdoor Education Advisers' Panel Guidance on Overseas Expeditions 2002
- DfES 'Health and Safety of Pupils on Educational Visits 1998', and 2002 supplements;
- The guidance/requirements for educational visits in a range of local authorities;
- The following Overseas Expedition Providers: Adventureworks, Brathay Exploration Group, Freewill Outdoor Pursuits, Outlook Expeditions, Outposts Ltd., The Expedition Company, Wilderness Expertise, Wind, Sand & Stars, World Challenge Expeditions;
- Other sources, eg RGS (with IBG), Year Out Group, BMC, RLSS (UK), external consultants, etc.

2 Compliance by the Overseas Expedition Provider

The school should request a written statement from the Provider confirming compliance with GOE (Edition 4) prior to entering into a contract. The requirements are the same regardless of whether the Provider is a voluntary, educational, charitable or commercial organisation.

Non-compliance does not necessarily mean that the expedition will not be approved by the LA/employer. Rather, the purpose of this procedure is to highlight and resolve any potentially contentious issues early in the planning process, and before a contract is entered into.

Where a Provider is unable to confirm full compliance with GOE (Edition 4) they are asked to identify all areas of potential non-compliance. These must be subsequently agreed or resolved to the satisfaction of the LA/employer prior to a contract being entered into.

Some employers and local authorities 'vet' or 'approve' Providers, and will obtain confirmation of compliance with GOE (Edition 4) on behalf of their schools. This may be on an annual basis in respect of all ventures offered by a Provider, or may be on an individual expedition basis. More typically however, the onus on obtaining confirmation of compliance with GOE (Edition 4) will be the responsibility of the school).

Where a significant amendment to GOE (Edition 4) is made subsequent to a Provider confirming compliance, then this must be made clear to all parties as early as possible, and the implications of this discussed with the LA/employer.

3 Target Expeditions

'Overseas Expeditions' typically take place in remote areas of the world and/or in developing countries, both of which present significant hazards and organisational challenges not normally encountered in the UK or Europe.

This document is targeted at an expedition that typically includes most or all of the following:

- is developed or commissioned as an educational package for young people/adults, *and*
- has trekking into remote areas as a component, which may involve fieldwork and community projects *and*
- visits or journeys through one or more challenging environments (N.B. 'challenging' as compared to the current experience of the young people concerning high mountains, jungle, deserts or similar) *and*
- is placed in a considerably contrasting culture(s) to those of the participants *and*
- is designed to be of a team building nature *and*
- raises young people's awareness and skills in assessing and managing risks.

It is not:

- an individual or small independent group's self led expedition *or*
- an over 18's expedition *or*
- an extreme challenge in hazardous environments *or*
- an expedition requiring the young people to manage unknown risks; making decisions without training or relevant information; or to manage known risks without the support of a competent leader.

Note: Unless this is an agreed joint venture between two or more schools, other adults or young people may only be included in the expedition if they:

- a) are part of the school's designated group *or*
- b) are a designated representative of the school or LA *or*
- c) are an employee of the Provider *or*
- d) are engaged by the Provider in a supporting or training capacity.

4 Terminology

As this document is used by a range of schools and youth groups from both the maintained and independent sectors, the following terms are used for clarity:

LA/employer	The employer of the school staff, ie. the local authority, governing body, proprietor, owner, etc.
School	School, youth group, or similar.
School Leader	The named member of staff employed by the LA/school, and designated by the Headteacher and EVC to be the school's visit leader. Also the 'pastoral' leader.
Expedition Leader	The named (senior if more than one) leader from the third party provider, organisation or tour operator. Normally the 'technical' leader.
Provider	The third party agency, charity, commercial company, or tour operator employed by the school.
Staff	Any adult from either the school or the Provider that is involved in the venture, who is not a student at the school. This would include expedition 'assistants', or volunteers.
EVC	The school's Educational Visits Coordinator.
Parent	Parent/s, or person with parental responsibility.

5 Purpose of Expedition

GOE (Edition 4) acknowledges the immense value of overseas expeditions to young people, and fully supports and encourages expeditions that are well planned, managed, and conducted.

As with any other educational visit, the venture must have clearly defined educational aims, which are appropriate to the needs of the group generally, and to individuals within the group specifically.

The school should consider whether these aims could be met more easily and at less cost through a venture closer to home, eg. in the UK or Europe, and if so should initially investigate this option.

6 Responsibilities

There must be clarity (in advance) amongst all parties as to where the responsibility lies for each aspect of the venture, i.e. the preparatory stages, training programme, itinerary, transport, accommodation, rest & relaxation periods, etc. These responsibilities will lie variously with the Provider, the school, or LA/employer. Several tasks and duties will be delegated, for example, to the Expedition Leader or School Leader. See also [Section 18](#): 'Leader Team Competencies'.

7 Recommended Time-Scale

18+ months before the venture	Proposal initiated Aims and objectives agreed Several companies approached Area/Location(s) proposed Itinerary options outlined Current risk assessments/research made available
	School to request and obtain Outline Approval from their employer (where required) Group formed Communication with parents Approval framework agreed eg leadership team requirements Contract agreed with Provider and deposit forwarded
Continuous preparation	LA/employer representative may contact EVC / School Leader
Group liaison & communication	Expedition Leader confirmed and agreed Group training programmed Research continues
3-4 months minimum (ideally 6 months)	All final details agreed Training programme and preparation underway Medical and other requirements completed Event specific risk assessment prepared
If issues still exist beyond that date	Agree alternative location Agree different Expedition Leader Consider postponement Cancellation (liaise with company over liability)
8+ weeks before	School requests final approval (where required) LA/employer representative may contact EVC / School Leader Final approval granted

Note: A shorter timescale may be appropriate for certain shorter duration expeditions that take place closer to the U.K., eg. Europe, Morocco, etc.

8 Selection of Provider

It is recommended that schools should choose a Provider that holds an LOtC Quality Badge (for Overseas Expeditions), as these providers will have been inspected and externally accredited. This is regardless of any other accreditations or declaration statements.

The school should consider a number of Providers prior to the selection of a specific one. This is primarily in order to ensure:

- best suitability of provision;
- best prospects of achieving the desired aims and objectives;
- that the requirements under best value are met.

It is the school's responsibility to determine the suitability of a chosen Provider, and the school must have a clear rationale for its choice. The requirements are the same for both commercial providers and charitable organisations.

Providers may be found via Kaddi www.kaddi.com which automatically synchronises with accreditation systems, including the LOtC Quality Badge.

There must be transparency if incentives are used during the sales process. The Provider must inform the LA/employer of any such incentives. Similarly, any member of staff offered an incentive must inform their LA/employer of such incentives.

Pre-expedition training courses for staff are encouraged, however incentives (eg. ski-trips) which are not relevant to the expedition process itself should not be used during the sales process.

9 Approval

This section is aimed primarily at the school, and refers to approval of the expedition, not approval of the Provider.

The employer (eg. local authority or governing body) retains the ultimate responsibility and will normally approve the expedition. In some cases the employer may delegate this task to the school.

You are required to follow the approval system of your employer, and should contact your employer if you are unsure of the procedure.

The procedure for approval varies between employer / local authorities, and whether or not an electronic approval system (eg. EVOLVE) is used.

Approval would normally be granted where the Provider has met the requirements of GOE (and/or other accreditation), and all aspects of the venture have been finalised and agreed, including:

- Final itinerary;
- Staff and student details;
- Emergency Contact details;
- Provider information including risk assessments;
- Insurance details;
- Information letter/s to parents;
- All other relevant documents.

10 Insurance

The level of insurance provision must meet LA/employer requirements. The school must check the level of insurance cover offered with their employer prior to making a commitment to the venture.

The following must be included within the overall insurance provision:

- a) The Provider must have Public Liability insurance in place for all participants, including both the leadership team and the support team.
- b) The Provider must ensure that any third party provider that they might use has appropriate insurances in place.
- c) Medical insurance must include: emergency assistance and repatriation (including air ambulance and air transport costs); emergency dental treatment; travel and accommodation expenses for a minimum of one person who has to travel to, or remain with, or escort an incapacitated or injured participant.

11 Contracts & Legal Issues

- There should be a written contract between the school (on behalf of the young people and their parents) and the Provider. This contract should be similar to the contracts placed with other commercial providers, which agrees to the conditions as set out generally in the Provider's brochure and for any specifications unique to the particular location or activity.
- School staff accompanying the expedition must do so as employees of the LA/school and should not sign a separate contract with the Provider.
- As with other visits the school should retain financial control of the contract by collecting monies due in staged payments from the students and paying the Provider directly through the school's accounting procedures. Parents should not sign separate contracts with the Provider. However, it is acknowledged that it may be more efficient for parents to make payments directly to the Provider. Where this occurs there must be a separate written statement or 'Memorandum of Understanding' between the Provider and the school that ensures that the school retains control of the venture.
- The Provider must illustrate the financial systems that exist to protect all aspects of the expedition's finances, including training weekends, etc. This should include ATOL bonding for all monies and include a statement that they comply with 'The Package Travel, Package Holidays and Package Tours Regulations 1992'.
- The commitment by the Provider to adhere to GOE (Edition 4), or any agreed variations, is central to Approval. Where a Provider revokes on a significant previously agreed arrangement (for example, if the Provider is unable to supply an Expedition Leader with the previously agreed level of competence), and it is not possible to resolve the matter to the satisfaction of the LA/employer, then the school reserves the right to cancel the venture and for all monies paid to be refunded. However, it is acknowledged that there may be occasions where it is appropriate to make reasonable allowances for work carried out up until cancellation.
- The Provider's Cancellation Policy must be 'fair and reasonable'.

12 School Staff Competencies & Training

- The school's EVC and/or Headteacher must assess the competence of the designated School Leader and any other supporting school staff.
- Prior to making a commitment to the expedition, school staff should liaise with the Provider in order to ensure that they have the required level of fitness.
- Unless the employer/school requires a higher level of competence or qualification, the School Leader and any supporting school staff should, as a minimum, possess 'a good working knowledge' of first aid (see [Section 21](#)).
- It is recommended that the School Leader attends the one-day 'RGS Overseas Expeditions and Fieldwork Course' (see [Section 13](#)). Note: in some local authorities this may be a requirement.
- School staff should receive appropriate expedition specific 'training' by the Provider.
- The EVC must consider the implications that would arise in the event that the designated School Leader is unable to participate in the expedition (eg. through illness, injury, or job change), and must put in place appropriate contingency plans to allow for this eventuality.

13 RGS (with IGB) Overseas Expeditions & Fieldwork Course for Teachers and Youth Leaders

It is no longer a requirement of GOE (Edition 4) for the School Leader to attend this course, if the intended provider holds an LOtC Quality Badge (for Overseas Expeditions).

If the intended provider does not hold an LOtC Quality Badge (for Overseas Expeditions), then the School Leader may find it beneficial to attend this course prior to selecting a Provider.

See www.rgs.org/go

14 External Reports / External Accreditation / Post-Expedition Reports

Learning Outside the Classroom (LOtC) Quality Badge

It is recommended that schools should choose a Provider that holds an LOtC Quality Badge (for Overseas Expeditions), as these providers will have been inspected and externally accredited. This is regardless of any other Provider accreditations or declaration statements.

See www.lotcqualitybadge.org.uk or www.kaddi.com

External inspections, reports, etc.

The Provider should pass on details of any independent, inspection-based external verification to the school, prior to the school making a commitment to the venture.

Viewing of post expedition reports

The School Leader should request sight of any post-expedition reports from similar expeditions, and where possible the Provider should make available those that may be of most use to the school.

BS8848:2014

Conformance with BS8848:2014 British Standard: '*Specification for the provision of visits, expeditions, and adventurous activities, outside the United Kingdom*' is not a requirement of GOE (Edition 4), but may be a useful supporting tool. It may also be useful for schools' own self-led expeditions, ie. when not using an external provider.

Although BS8848:2014 sets out what is required for conformance, it: a) '*does not explain how to achieve the standard, and as such does not offer guidance*', and b) lacks external assessment/inspection where a venture provider is claiming conformity via the 'self-assessment' route.

See www.bsigroup.com/BS8848

Expedition Providers Association (EPA)

Membership of EPA is not a requirement of GOE (Edition 4), but may be a useful adjunct where a provider does not hold an LOtC Quality Badge (for Overseas Expeditions).

See www.expeditionprovidersassociation.co.uk

Evaluation

On completion of the venture, the Provider shall ensure that:

- a) An evaluation is undertaken which includes comment on any significant issues and reference to the stated aims and objectives;
- b) All participants are provided the opportunity to contribute to such evaluation;
- c) Where indicated, the Provider's systems and procedures are reviewed, and revised to take account of any matters arising and lessons learned from the evaluation.

On completion of the venture, the school shall ensure that:

- a) An evaluation is undertaken which includes comment on any significant issues and reference to the stated aims and objectives;
- b) All participants are provided the opportunity to contribute to such evaluation;
- c) Feedback is given to the Provider;
- d) Where indicated, the school's systems and procedures are reviewed and revised to take account of any matters arising and lessons learned from the evaluation.

15 Information to Parents & Parental Consent

Parents should be invited to a meeting with the School and the Provider, prior to being invited to make a commitment to the venture. Information given to parents must be clear and detailed. This is the school's responsibility, following consultation with the Provider. Parental consent must be based on a full understanding of the expedition characteristics and programme. The information must include:

- **ALL** planned or possible activities, including any contingency activities (ie Plan B);
- Rest & relaxation periods;
- Supervision arrangements;
- Codes of practice;
- Communication systems during all stages of the expedition;
- The pace and level of intensity of the expedition;
- Injury, illness, incident, emergency and evacuation procedures;
- Insurance arrangements;
- Transport;
- Accommodation;
- Disciplinary sanctions that are in place and who is liable for repatriation in this situation;
- Likely additional costs to participants, eg. clothing, inoculations, visas, spending money, etc.

It is acknowledged that only general information regarding routine activities and safety arrangements might be available at the initial meeting. However, full detailed arrangements should be provided to parents when details of the activities (eg. projects etc.) have been finalised. This should be at least 3-4 months before departure.

It is recommended that it is explained to parents that whilst every step will be taken to ensure the safety of the participants, such activities are by their very nature potentially hazardous. It is important to identify the risks and have them acknowledged by parents on a fully informed basis.

As with any other educational visit, it is the responsibility of the school to request and retain details of parental consent. Where appropriate, the school must liaise with the Provider regarding relevant matters, e.g. medical or behavioural issues, swimming ability, etc.

16 Preparation of Students & Fitness

Unless the nature of the visit suggests otherwise, a training and induction programme (for example, including hill walking and carrying packs) should be planned for all participants including staff, and monitored jointly between the Provider and the School Leader to identify and improve:

- levels of fitness for the expedition;
- group dynamics and team work;
- personal confidence in the skills required;
- risk assessment and risk management awareness.

There must be sufficient flexibility within the expedition programme to allow for variations in final fitness levels.

Where the Provider delivers preparatory adventurous activities then these must comply with the requirements under the Adventure Activities Licensing Service (AALS) where legally required to do so.

Where such preparatory activities take place overseas or are otherwise out of scope of the AALS, then the Provider must ensure that the systems and procedures in place for the activities follow nationally accepted standards of good practice.

Where preparatory activities are delivered by the school or another Provider, then these will comply with the normal procedures required by the LA/employer for such activities.

17 Planning

Written plans (based on educational aims and risk-benefit assessment) must cover all elements of the programme. They should be current, and prepared by someone with an appropriate level of competence and experience, and must include:

- **ALL** planned or possible activities, including any contingency activities (ie. Plan B);
- Initial site specific considerations;
- Route choices;
- Transport;
- Accommodation, including suitability, security, safety precautions, and emergency evacuation;
- Rest and relaxation periods;
- Emergency procedures and evacuation;
- All other areas where a known significant hazard exists;
- Culture: including food/drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information.

The generic visit plans (as above) should be available from the Provider at an early stage in the planning process, and prior to the school and parents making a commitment to the venture.

In the final stages of planning, these generic plans should be supplemented where appropriate with event specific information. This final process is the responsibility of the Expedition Leader, following liaison with the School Leader. It must take place before the commencement of the expedition, but by definition can only take place when:

- Training sessions have been completed;
- The Expedition Leader has been appointed and has worked with the group;
- The medical information of participants is known;
- Participants' fitness levels, etc have been assessed;
- Other relevant information about participants is known (eg swimming ability);
- The current situation in the country to be visited is known (eg political, etc).

Where students are required to make decisions (eg. regarding accommodation, transport, guides, etc.) all risk assessments must have been carried out in advance by the Provider, although this may be unknown to students – (the journey into the unknown should only apply to students, not to staff).

Ongoing Risk Assessment

Risks must be monitored throughout the venture and where appropriate activities modified or curtailed to suit changed or changing circumstances.

All members of the party have a duty to monitor risks on an on-going basis to the best of their ability, but the responsibility for this rests primarily with whoever has the principal duty of care of the participants at the time. In the majority of instances, including where technical issues are concerned, this will usually be the responsibility of the Expedition Leader.

See also [Section 18](#): Leader Team Competencies.

18 Leader Team Competencies

It is essential that the technical and pastoral aspects of the expedition leadership are understood:

- **Technical competence** To plan, lead and manage activities undertaken in an active, on-going risk management context. This will normally be the Provider's Expedition Leader. This person would have the level of experience and qualifications outlined in the ['Expedition Leader Matrix'](#).
- **Pastoral competence** To manage the care, welfare and experience of young people successfully according to their age, experience and needs. This is normally the School Leader. This person would have a nationally recognised qualification: eg. teacher or youth worker.

Just as pastoral competence is developed through positive experience, technical competence must be complemented by the experience of making active judgements and risk assessments in realistic contexts, thus gaining and developing the leader's experience. GOE (Edition 4) recognises the importance of this process.

In all but technical decisions relating to the welfare of the group, it is normally the (pastoral) School Leader who has the final say, for example:

- The (pastoral) School Leader may ask for an activity to stop, or request a rest or an alternative where their greater knowledge of the group health and welfare leads them to such a decision. The (technical) Expedition Leader may ask or challenge their reasons, but would not override any such decisions (unless there was a clear health and safety reason for doing so).
- The (technical) Expedition Leader may decide the group is not able to go on and explain their reasoning. The (pastoral) School Leader may ask for and challenge their reasons, but would not override any such technical decisions.

Should a leader have both technical and pastoral competence, they need to be very clear about their responsibilities. Dual competence cannot mean a reduction in ratios, a competent assistant would be needed.

The School Leader should have general competence in leading off-site visits and activities, managing groups in residential settings and in busy towns/cities, and experience in areas such as supervising transport, group feeding, etc.

19 Liaison with Expedition Leader

Where the Expedition Leader is external to the group then sufficient time in training must be made available for that leader to:

- become personally acquainted with the young people and their leaders to decide if they can work together;
- make a proper assessment of individual, group, and assistant leader competencies;
- reconfirm aims and expectations.

The Expedition Leader should be appointed to the group no less than 4 months (ideally 6 months) prior to the expedition, and work with the group soon after appointment, ideally as part of their training programme.

20 Expedition Leader Matrix

The competence of the (technical) Expedition Leader is regarded as the single most important factor in ensuring a safe and successful expedition.

The school and School Leader are not normally specialist in the area of overseas expeditions, and as such cannot be expected to have the expertise necessary in order to assess the competence of the Provider's designated Expedition Leader. This section is therefore aimed primarily at the Provider.

In presenting the matrix of Expedition Leader competencies, its principles need to be understood. Where the matrix does not cover the exact terrain or circumstances, the below principles must be applied.

The basic principles are that:

- the Expedition Leader must be able to demonstrate an appropriate level of competence, in line with current good practice;
- there must be evidence of that competence through an assessment or judgement, made by a person of sufficient status, qualification and/or experience to make that judgement (ie. a 'technical adviser'), and be recognised as being able to do so.

Two principal routes are taken in this matrix:

1. Recognised qualifications **plus** additional experience and local knowledge. The matrix accepts and promotes the value of a base line of technical competence given by a national governing body award such as a mountain qualification. It also accepts that in these contexts this is insufficient without additional experience of the activities in the region concerned, and the need for essential local knowledge. These elements need to be seen as complementary requirements.
2. Where there is no recognised qualification (in the specific terrain, region, or culture) then it is most important that the principals are applied as realistically as possible.
 - Where is the evidence of current good practice/competency? For example, the person should be an expeditioner known to recognised expedition groups or major agencies. Their competence would have been evidenced by others able to make a judgement.
 - The person(s) making the judgement (ie. a 'technical adviser') would need to be nationally recognised or recognised by others of such a standing, or part of an organisation that has such a clearly recognisable standing. In the absence of the moderation of an award, this person should be external to the expedition group or company concerned. (Applying the principles in this way allows for a realistic comparison to the first route in terms of the consistency of judgements made).

If the Provider is unable to meet the above criteria relating to the competence of the Expedition Leader then this must be discussed with the LA/employer, and resolved prior to the Provider entering into a contract with the school.

Expedition Leader Matrix

Activity/hazard level	Terrain	Expedition Leader qualification	Expedition Assistant Leader qualification	Additional Experience	Essential local knowledge
Day Treks and Trekking to fixed or mobile camps	Walking terrain in summer conditions Jungle travel	ML (Summer) Expedition Mountain Leader <i>Suitable MoD qualification or specific evidence of competence</i>	Assessed competence in this terrain eg ML (Summer) training where assessment of competence available or Hill and Moorland Leader / Walking Group Leader (assessed)	journeying or expeditioning in the region concerned	* the availability and efficiency of: - transport systems - medical facilities
Day Treks and Trekking to fixed or mobile camps	Scrambling Terrain requiring the use of ropes or fixed cables; in summer conditions Jungle travel	MIA <i>Suitable MoD qualification or specific evidence of competence</i>	MIA training or ML (Summer) plus SPA	journeying or expeditioning and scrambling in the region concerned	- emergency support - guides - accommodation
Day Treks and Trekking to fixed or mobile camps	Walking terrain above the snow line (non glacial) Jungle travel	ML Winter or IML where a winter component has been assessed <i>Suitable MoD qualification or specific evidence of competence</i>	ML Winter training IML training with winter component	journeying or expeditioning in the region concerned	* local culture: - advantages/issues - crime - gender - religions
Day Treks and Trekking to fixed or mobile camps	Scrambling Terrain requiring the use of ropes or fixed cables including snow and ice conditions (non glacial) Jungle travel	MIC <i>Suitable MoD qualification or specific evidence of competence</i>	MIA with Winter ML	good awareness of the region and its routes	Jungle travel In order to obtain an equivalent to the 'assessed competence' in other activities, an MoD qualification or similar endorsement would be required from a recognised source, which in turn would need to be able to provide evidence of their ability and experience to make such an assessment. (This could be true of other journeying, eg arctic travel.)
Day Treks and Trekking to fixed or mobile camps	Mountaineering requiring the use of ropes or fixed cables including glaciated snow and ice Jungle travel	UIA Guide <i>Suitable MoD qualification or specific evidence of competence</i>	MIC	good awareness of the region and its routes	

21 First Aid Competencies

The Expedition Leader must hold as a minimum a 16 hour (assessed) First Aid Award, competency in 'remote' first aid, and knowledge of first aid relevant to the specific environment to be visited, eg. desert, jungle, altitude.

Unless the employer/school requires a higher level of competence or qualification, the School Leader and any supporting school staff should, as a minimum, possess 'a good working knowledge' of first aid.

22 Supervision Ratios

Ratios will vary considerably, based on risk assessments in the particular environment and if the Technical/Pastoral roles are split. The major considerations are:

- The norm for most visits is that there will be at least two leaders, with a gender balance in the case of a mixed gender group. However, it is acknowledged that exceptional circumstances may allow variation in this.
- A staff/student ratio in line with current good practice for similar expeditions, taking into account all variables, e.g. route, participants, possible weather conditions, Plan B, emergency procedures, competence of staff, equipment, etc.

23 Emergency Communications

The Provider must use the most suitable emergency communication system that is active in the region(s) to be visited. Where mobile or satellite phones are known to operate in a region then this is the preferred choice. In remote locations, where there is only partial phone coverage, then this must be supplemented by another form of emergency communication, such as radio net and runner.

24 Emergency Procedures and Evacuation

Written and agreed emergency procedures and contingency plans should be fully understood by all involved in the expedition. It is the responsibility of the Expedition Leader and Provider to ensure that appropriate emergency and evacuation procedures are in place. As part of this, it is essential:

- to have a very accurate knowledge of the scope and limitations of the rescue services before making a decision on the viability of an area or specific route and its suitability for the group concerned;
- to understand the full implications of any individual or group evacuation in the event of an incident or injury. The evacuation of a student will normally require an accompanying member of staff, which has implications for the remaining group;
- that the rescue and evacuation procedures of the route and area are fully considered in the risk assessment. Where a life-threatening injury or illness could not be evacuated with some efficiency and effectiveness, then the area may be inappropriate. Where this might apply the intended arrangements must be agreed in advance with the school/LA;
- that the assistant leader's competence should be sufficient to successfully apply the emergency or incident management strategies should the leader become incapacitated.

25 Swimming

Swimming activities are encouraged, provided they can be appropriately supervised. The aim is NOT to prevent swimming activities, even 'wild swimming' (i.e. swimming in places other than purpose built or supervised resources). The visit plan should therefore consider the opportunities and merits of young people experiencing, and learning about the hazards of water.

Prior to swimming activities taking place, there must be clarity as to whether the overall responsibility for participant safety rests with the school or Provider, or if this is shared.

- **If the responsibility for swimming rests with the Provider**, then the school and parents must be informed of the provider's policy. As a minimum the Expedition Leader must, provide an appropriate level of supervision*, and implement adequate control measures. Where the level of supervision is not in accordance with * below, the Provider must inform the school/employer of this, and the level of lifeguarding must be agreed to the satisfaction of the school/employer in advance of a contract being entered into.
- **If the responsibility for swimming rests with the school**, then the activity may only take place if either:
 - a) the activity takes place at an appropriately lifeguarded* swimming pool, *or*
 - b) an appropriately qualified* lifeguard, designated specifically for the group, is in attendance, *or*
 - c) the member of school staff supervising the activity has been specifically approved by the LA/employer in advance, in accordance with the employer/school's normal procedures.
- **If the responsibility for swimming is shared between the Provider and school**, both parties will agree arrangements in advance, based on a combination of the above.

* in accordance with [RLSS \(UK\)](#), [RoSPA](#), or other nationally accepted guidance.

26 Other Adventurous Activities

The Expedition Leader is responsible for all adventurous activities, unless a member of school staff has been specifically approved by the LA/employer to lead such activities, in which case normal school procedures will apply.

27 Acute Mountain Sickness & use of Diamox

The Provider must ensure that the following guidelines are adhered to:

- *'Above 2500-3000m the next night should not be planned more than 300-500m higher than the previous one'* (UIAA 2012). Note. slower ascent may be necessary for some individuals.
- *'There should be two nights at the same altitude after every 2-4 days of ascent. On this day you may climb higher, but return to sleep'* (UIAA 2012).
- The itinerary must be flexible to allow additional days of rest without further ascent, if necessary.
- *'The use of drugs (Acetazolamide, eg. Diamox) to prevent altitude symptoms should be restricted to some special situations, for example if a fast ascent cannot be avoided for any reason (airport of destination at high altitude, rescue operations) or when a person suffers from symptoms although he/she has followed an adequate altitude profile - so called 'slow acclimatizer'* (UIAA 2012).
- The use of drugs has been approved by an appropriate medical officer, and parental consent has been obtained.

Additional guidance may be obtained from the BMC www.thebmc.org.uk

28 Remote Supervision

It is assumed that the young people will be accompanied during their expedition. Should the aim of the expedition include more self-reliant activity, the decision to move to indirect supervision must only be made on observed evidence of the competence of the whole group, and is the responsibility of the Expedition Leader, following liaison with the School Leader.

Any remote working where the group, or part of the group, does not have quick and direct access to the Expedition Leader or School Leader is inappropriate for this type of expeditioning and should not occur.

29 The Use of Guides

The ultimate responsibility for the selection and use of guides rests with the Provider / Expedition Leader, even though the young people and School Leader may be involved in the process.

If the use of guides is to be considered as a part of the leader competency in that they supply some local knowledge, then the following questions must be asked as far as is practical:

- Where is the evidence of current good practice/competency of the actual guides to be used?
- Are they a recognised company or individual guide? Have they been used before and to what effect? Evidence would need to be collected, in particular where there is no recognised guiding system.
- Guides are normally employed for specific route-finding and technical knowledge. If appropriate, guides may have a supporting pastoral role, but not sole pastoral responsibility.
- It must be remembered that a good guide can complement the Expedition Leader, but must not replace the Expedition Leader.
- Where there is not good evidence of their competence, then the Expedition Leader should have sufficient experience and local knowledge to manage without a guide. This must be considered before routes are agreed.
- Where there is not good evidence of their history / character, then the guide must not have unsupervised contact with the students.
- Where an additional risk assessment is required to manage changing circumstances such a weather, fitness, injury, local conditions, etc. the Expedition Leader must satisfy him/herself that the guide and local information are of sufficient quality for them to go ahead, or the Expedition Leader must use an already planned contingency alternative (Plan B).

30 The Use of Porters

Where the length of the expedition requires porters to support the carrying of equipment, the Expedition Leader must ensure that sufficient numbers are available.

The experience and fitness of the young people allied to the demands of the terrain, environment and weather should determine the weight of the pack or load they can carry.

31 Child Protection

Written child protection procedures should be available and evidence of policies in action, eg. references / interviews / DBS (enhanced disclosure) / List 99 / male-female leader ratios for mixed groups / accommodation / camp security / etc.

Participants should be suitably briefed with regards to 'keeping safe', and should be advised as to when and how to report an issue and how to raise an alarm.

32 Environmental Issues

The Provider should have a comprehensive policy that minimises any negative effects of their activities on the environment.

Sources of information and advice

Kaddi (National Provider Database)	www.kaddi.com
LOtC Quality Badge	www.lotcqualitybadge.org.uk
OEAP National Guidance	www.oeapng.info
Outdoor Education Advisers Panel	www.oeap.info
National Library (Resource Library)	www.national-library.info
EVOLVE	www.edufocus.co.uk
Adventure Activities Licensing Service	www.aals.org.uk
Expedition Providers Association	www.expeditionprovidersassociation.co.uk

Disclaimer

Whilst every attempt has been made to ensure accurate information and recommend robust procedures, the author, Clive Atkins, makes no guarantee as to the suitability of the information contained within this document for any particular venture. Schools and organisations are welcome to use this document, but the responsibility for providing guidance and recommending procedures rests with the school's employer.