

Inspire - Enable - Achieve



The Vale Federation Educational Visits Policy

Reviewed January 2022

This policy was adopted on

March 2020

The policy is to be reviewed by

January 2023

Signed: C Stephenson Principal

Date: 14/1/2022 Type text here

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Provider Form..... For Providers without LOTC Quality Badge

ESP..... Event Specific Plan template

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Serious Incident Action Card for the Group Leader

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1 General

This document sets out the requirements of Buckinghamshire County Council (BCC) with reference to National Guidance and EVOLVE.

BCC (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.

The LA adopts the Outdoor Education Advisers' Panel 'National Guidance' (NG): www.oeapng.info
NG references in this document hyperlink to the specific sections of NG. (There are also links to the sections within this document.)

The LA uses the web-based system 'EVOLVE' buckscvisits.org to support 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 a planning tool for staff, EVOLVE also contains a variety of features including: search and report facilities, downloadable resources, a link to a National Library www.national-library.info, staff records and visit history.

In order to make this document concise, hyperlinks are used throughout this document.

2 Role of the Educational Visits Coordinator and the context

To help fulfil its health and safety obligations for visits, establishments should appoint an Educational Visits Coordinator (EVC) who will support the Head of Establishment (Head). In small establishments the EVC may also be the Head. Should the establishment choose not to appoint an EVC, those functions will automatically fall to the Head.

- 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. Commonly, but not exclusively, such competence will be identified in a person on the senior management of the establishment.
- The EVC must attend initial EVC training and update training as required by the LA.
- The EVC should support the Head in ensuring that competent staff are assigned to lead and accompany visits, with approval and other decisions. ([Section 10](#))
- The EVC should ensure that a policy is in place for educational and off-site visits, and that this is updated as necessary. This should be readily available to staff via their establishment's own EVOLVE Resources section.

Additional information [National Guidance](#) : [3.4j Educational Visits Coordinator \(EVC\)](#)

[3.3a EVC check list](#)

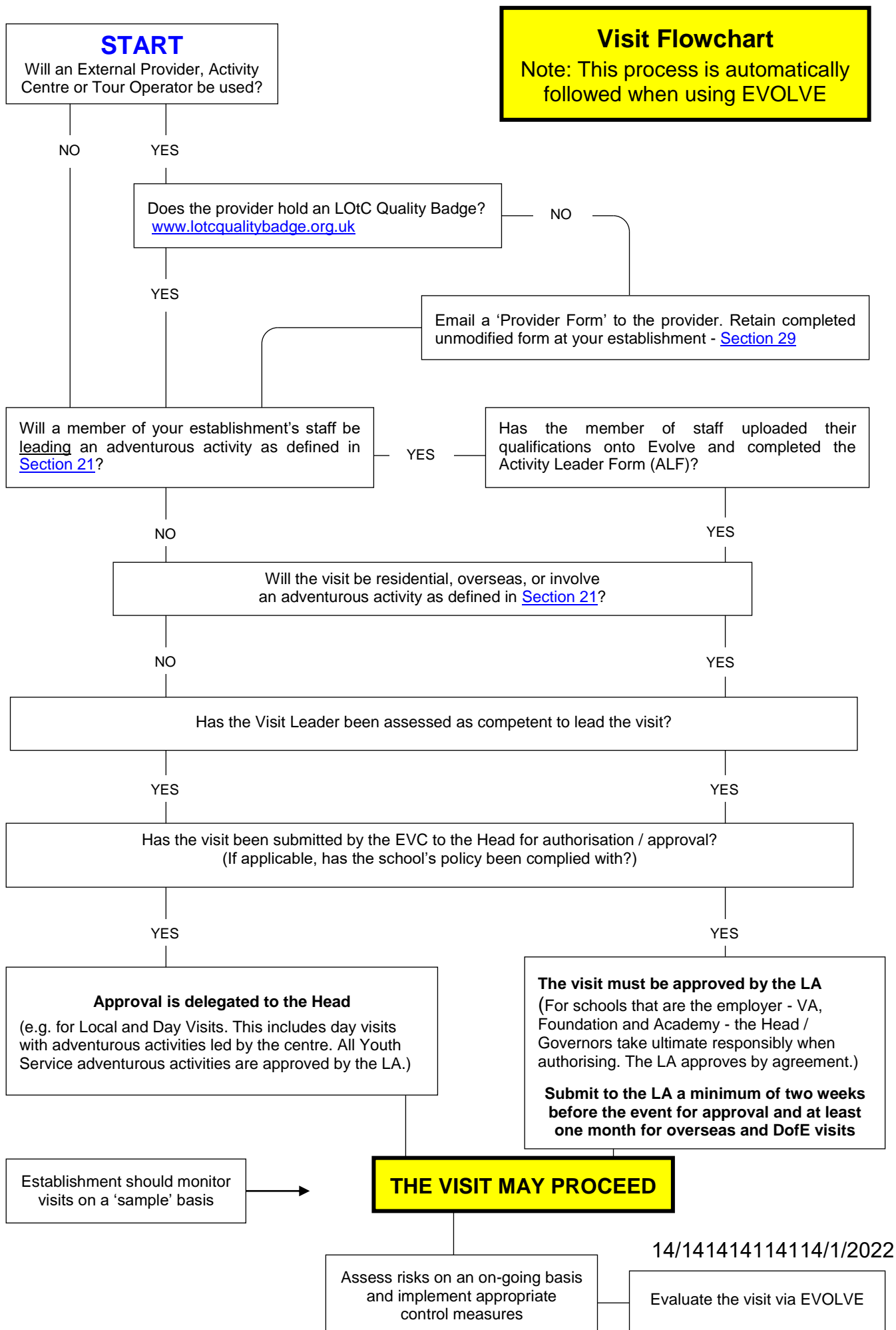
[3.4g Head Teachers/Managers](#)

[3.3b Head or Manager Check List](#)

[3.4k Visit or Activity Leader](#)

[3.3e Visit Leader Check List](#)

14/11/11/1/2022/2022/2022/2022



3 Approval of Visits

In approving visits the Head and EVC should ensure that the visit leader has been inducted / trained, and is competent to lead the visit. ([Section 10](#)) The LA supports training for visit leaders.

'Ad-hoc' activities: Visits within the local learning area may be dependent upon the right conditions on the day. Visit leaders can be given the flexibility to make decisions on the day, signing out before departure and leaving relevant information with the base contact. (An example 'Sign Out' sheet is in EVOLVE resources.) Such activities must be addressed in the school policy with a generic management plan in place. The event should then be recorded on Evolve the same day. Link to further information on the local learning area <https://naturalconnectionsblog.wordpress.com/2016/05/24/the-noise-of-exciting-learning/>

All other visits: It is recommended that all other visits are entered onto EVOLVE. Based on the visit types, EVOLVE automatically directs the flow for approval. (Schools can choose to enter sporting fixtures and swimming.)

The following visit types are 'authorised' within the establishment, and then 'approved'* by the LA via EVOLVE: Overseas, Residential and Adventurous Activity (if the adventurous activity is led by a member of staff from the establishment). ([Section 21](#))

Approval is delegated to the Head for visits not in the categories listed in Section 21.

Submit to the LA a minimum of 2 weeks before the visit for LA approval (1 month for DofE visits)

*The LA has responsibility for approval where it is the employer. Where the Governing Body is the employer, it is ultimately responsible. 'Approval' in this latter context by the LA is by invitation and is confirmation that the planning arrangements are sound based on the evidence submitted.

4 Outcomes

Clarity about the learning outcomes of the visit is essential to ensuring that the benefits can be achieved. Up to four 'intended' outcomes may be recorded on EVOLVE during the planning process for subsequent evaluation up to 28 days after the visit.

Work outside the classroom / centre can provide a very powerful means of developing motivation for learning in all curriculum areas and raise attainment. Experiential learning can also provide opportunities for development in other areas including emotional literacy. The publication [High Quality Outdoor Learning](#) should be used as a tool by visit leaders in identifying outcomes and in the evaluation of the learning taking place. It can also assist the leader in providing clarity to a provider so that the programme can be designed to meet expectations.

Additional information [National Guidance](#) : [5.2a Learning Outcomes Mind Map](#)
[5.2b Planning Basics for Outdoor Learning, Off Site Visits and Learning Outside the Classroom](#)

5 Inclusion

Refer to [National Guidance](#) : [3.2e 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. 14/1/2021 14/1/2022 14/1/2022
At the outset, visit leaders must consider the needs of everyone within the group when thinking about an appropriate venue.

6 Responsibilities

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

For community schools, community special schools, voluntary controlled schools, maintained nursery schools, pupil referral units, and BCC youth groups, the employer is the LA. These establishments must adhere to this guidance document and use Evolve. The LA will support during an emergency.

- For academies, foundation, independent, 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 not using LA guidance, establishments must have their own guidance and should ensure that their systems are equally as robust as those of the LA.
- All schools must have access to expert advice such as from a registered OEAP Adviser.
- Governing Bodies of non-maintained schools should be aware that the LA will provide support in an emergency if requested. Information that has been notified on Evolve can be accessed by the LA and so help it to assist. As part of the school's Educational Visits Policy, Governors should agree if - and under what circumstances - the LA would be asked to support. **Even if support is not requested, schools must inform the LA of an emergency.**

All involved in a visit have specific responsibilities which they should be clear about prior to the visit taking place. Refer to [Section 2 Educational Visits Coordinator](#) as well as;

Additional information [National Guidance](#) : [3.4l Assistant Leaders](#)
[3.3d Parent and Guardian Check List](#)
[3.4m Helper](#)
[3.4n Guidance for Parents](#)
[3.4o Volunteers](#)
[3.3f Young People Check List](#)

7 Planning / Assessment of Risk and Charging

The planning process by the leader may be compared to the expectation of a teacher or youth worker to plan a lesson/session.

EVOLVE provides a record of ongoing planning and enables the EVC and Head to contribute, support, and monitor the planning.

Risks are expected to be reduced to an *acceptable* or *tolerable* level, and not necessarily eliminated. Planning should achieve a rational balance between potential risks and the intended benefits of the activity. Additional information: [Managing Risk in Play Provision](#)

Conventional models of risk assessment are not necessarily helpful in a visits context. Visit planning should focus on, *'the really important things that we need to do to keep us safe'* taking into account significant issues specific to the event and place, the needs of the group (including special and medical needs) and the experience and competency of the staff team and the leader.

This can be recorded in a variety of ways and shared with all parties.

Refer to [National Guidance](#) : [4.3c Risk management - an overview](#)

- 4.3f Risk management - some practical advice
- 4.3g Risk management - what to record and how

4.4g Pre visiting an Adventure Activity Provider mind map

4.4h Using external providers and facilities

5.2b Planning Basics for Outdoor Learning, Off Site Visits and Learning Outside the Classroom

Some aspects of planning will already be in place in the form of existing arrangements based on experience (Generic Plans). It is not necessary to attach Generic Plans to the EVOLVE Visit Form, only to reference them and ensure that they are available and known to the staff accompanying the visit. These in conjunction with the EVOLVE Visit Form may be sufficient for a visit in the local learning area. Refer to 'Ad-hoc' activities in Section 3 [Approval of Visits](#)

Planning that includes [adventurous activity](#) (sections 21 & 22) commonly involves delivery by an [external provider or tour operator](#) (section 29). Where the provider has responsibility for managing an activity, the provider's risk assessment is not the concern of the visit leader, does not need to be requested from the provider, and does not need to be uploaded to EVOLVE. However, the leader can purposely ask the provider for information that will help with the overall planning and those aspects for which the establishment is directly responsible.

Refer to [National Guidance](#) : 4.4g Pre visiting an Adventure Activity Provider mind map
4.4h Using external providers and facilities

Alternative arrangements (Plan B) should be included as part of the planning process where appropriate, for example where weather conditions might be critical, or where an overcrowded venue might necessitate an alternative option.

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](#)

Charging - Refer to [National Guidance](#) : 3.2c Charging for school activities

8 Safety during the visit

Prior to the visit, staff must ensure that all participants understand what is expected of them. This includes any 'rules' or code of conduct that will be in place.

Monitoring of the visit by the visit leader and accompanying staff will 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 (Plan B) or curtail the visit or activity, adapting to changing circumstances (e.g. over-busy lunch area, rain 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 [National Guidance](#) : 8i Model Code of Conduct

9 Consent, information, contacts, 'Parent Pay' & E consent

Schools:

Activity taking place during school hours not involving a higher level of risk management:

Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required.

Acknowledgement of receipt of such information may be requested by the school. However, if the school is satisfied that it has well established communications with parents, then acknowledgement is not required even where a return slip was included with the letter.

Activity outside school hours or involving a higher level of risk management:

Refer to [National Guidance](#) : 4.3d Consent
4.4j Participant information

Other establishments:

Annual consent is appropriate for regular routine activities.

For all other visits, consent should be obtained on an individual visit basis. Information provided to parents prior to granting consent should include full details of the activities and any other significant information.

10 Competence to Lead

The competence of the visit leader is the single most important contributory factor in the safety of participants.

The EVC and/or Head must therefore 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?
- c) Does the leader exhibit sound decision making abilities?
- d) Is the leader an employee?
- e) Does the leader have the ability to manage the pastoral welfare of participants?
- f) What experience has the leader of the participants to be supervised?
- g) What experience has the leader of the environment and geographical area chosen?
- h) Is the leader appropriately qualified?
- i) If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- j) Is the leader aware of all relevant guidelines and able to act on these?

Refer to [National Guidance](#) : 3.2d / 4.4a Assessment of Competence

Where the EVC is not in position to make judgements about the competency of staff, there must be clarity within the organisation that this is judgement for the Head.

11 Staffing supervision and safeguarding

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

Ratios for Early Years are specified and must be adhered to.

For all other visits the visit leader, EVC and Head must make a professional judgement regarding the number and suitability of staffing on an individual visit basis taking into consideration the type, level, and duration of activity; the nature and requirements of individuals within the group, including those with additional needs; the experience and competence of staff and other adults; the venue, time of year and prevailing/predicted conditions; the contingency or 'Plan B' options.

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

Visit leaders, EVCs and Heads often find it helpful to have 'a starting point for consideration'. Where departure from the starting point results in fewer staff, the justification should be recorded as a note on EVOLVE. [Primary and secondary visits](#), [Reception and younger](#), and [Special school visits](#)

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 supervision of 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.

In addition to employees, the Disclosure and Barring Scheme (DBS) commonly applies to volunteers in a visits context.

Refer to [National Guidance](#) : [4.3b Ratios and effective supervision](#)
[6i FAQs: Unsupervised Time](#)
[6j FAQs: Taking a family member on a visit](#)
[4.3e Safeguarding](#)
[3.2g Vetting and Disclosure and Barring Service \(DBS\) Checks](#)
[7f Exchanges and home stays](#)

Direct Supervision occurs when the group remains within sight and contact of a leader.

Indirect Supervision (supervision within clear boundaries) occurs when a group is given the freedom to explore an environment or engage in an activity away from direct adult supervision but within clearly identified and agreed boundaries

Remote Supervision occurs when a group works at such a distance that direct supervision would take some time to be re-established (e.g. during a remotely supervised adventure walk; young people travelling independently to a venue; an orienteering activity; a Duke of Edinburgh Award expedition).

Refer to [National Guidance](#) : [4.2a Group management and supervision](#)
[6k FAQs: Visits and the threat from terrorism](#)

12 First Aid

Qualified first-aiders may not be necessary for all visits however, there should be a basic level of first aid support available at all times. This will require that one or more of the staff on the activity:

- Has a working knowledge of simple first aid.
- Is competent to use the first aid materials carried with the group.
- Knows how to access, and is able to access, qualified first aid support.

‘Basic Skills’ e.g. a 3 hour non-assessed course, is generally suitable for routine urban visits, however the nature of the visit may indicate that a higher level qualification is appropriate, especially in circumstances where it is likely that access by the emergency services may be delayed.

Based on the nature of the particular visit, the EVC (or visit leader) should make a professional judgement regarding the level of first aid required. A first aid kit appropriate to the visit should be carried.

For children in the Early Years Foundation Stage (EYFS), there is a statutory requirement that at least one person who has a current paediatric first aid certificate must accompany children on outings.

Refer to [National Guidance](#) : 4.4b First aid

13 Insurance

LA establishments or those that have purchased the LA insurance package can seek advice from the LA Insurance Service - Rachael Ruddy 01296 383197 rruddy@buckscscc.gov.uk. Academies which have not purchased the LA insurance package must check with their own insurers for advice on the levels of cover.

For visits abroad, visits including adventurous activities and residential visits, journey insurance must be taken out.

The responsibility for arranging adequate insurance cover rests with the visit leader. The LA will assist by effecting cover for County insurance, **but application must be submitted at least 2 weeks before commencement of the journey** if there is not a yearly cover in place.

The cancellation element of cover (e.g. the cost of airline tickets) is only in force from the date the insurance proposal form is received. Therefore, request cover before making any payment.

For those that would normally use the LA insurance, if alternative insurance arrangements are proposed by a provider, the policy must be agreed by the LA insurance section **and a copy submitted at least 8 weeks prior to the visit**. This allows time to check the cover provided and for the establishment to make alternative arrangements if needed. The cost of insurance cover should be taken into account at the planning stage of the visit.

Academies should check the suitability of any ‘included’ policies with their own insurers. Basic levels of cover for Personal Accident and Personal Liability should be as follows:

Personal Accident – Capital Sum £25,000 with a full continental scale

Medical & Associated Expenses - £5,000,000, Personal Property & Money - £1,500

Cancellation - £2,500, Personal Liability - £2,000,000

EVOLVE: buckscsccvisits.org

A copy of the policy for the visit must be available to all party leaders, volunteers and parents.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See <https://www.gov.uk/european-health-insurance-card>

Refer to [National Guidance](#) : 4.4c Insurance

14 Transport

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, and a [PRIVATE CAR](#) Form completed and retained by the establishment annually.

Coaches

The LA does not 'approve' coach companies. UK legislation requires that coach companies are fit for public use however, the facilities available on coaches may vary. Liaising with other establishments within the LA that have used a particular company (via a search on EVOLVE – RESOURCES > Search > Mode of Travel > Hired Coach / Minibus with Driver> select company from drop-down list) will help to determine the level of service that may be provided. Coach companies should be able to provide advice on the appropriate seat belt / restraint system to meet the needs of your group.

A regularly used and trusted coach company may sub-contract or sub-sub-contract over busy periods with a possible loss of quality. Consider stipulating that your booking will not be sub-contracted unless you are asked well in advance for your agreement.

Minibuses driven in the UK

Establishments that own or hire a minibus must have an operational policy and a maintenance schedule.

The driver of a minibus with a Gross Vehicle Weight (GVW) of over 3500 kg must hold a Category D1 Licence. Staff who passed their test after January 1st 1997 will require a Passenger Carrying Vehicle (PCV) course and test.

Chiltern Development Training <http://chilterndrivertraining.co.uk/> provides minibus tests and PSV training and assessment for the LA.

Minibuses under a GVW of 3500 kg can be driven by someone who holds a Category B Licence (with the additional requirements explained below) which is achieved by passing the standard car test. **It would be expected that such a licence holder would take a minibus test (not PCV) to confirm competence to drive this type of vehicle.** (A Category B Licence holder cannot tow a trailer.)

- Driver is aged 21 years or over.
- Has held their category B driving licence for at least two years.
- The minibus is being used by a non-commercial body for social purposes, but not for hire or reward.
- Driver is not being paid to drive the minibus, other than out-of-pocket expenses.
- The minibus does not exceed 3.5 tonnes (or 4.25 tonnes if specialised equipment for the carriage of disabled passengers is included) gross vehicle weight.

It is strongly advised that **all minibuses with 9-16 passenger seats display a Section 19 permit.** (Email fleetmanagement@buckscc.gov.uk for registration forms) This will overcome an unlikely but possible challenge about provision for hire and reward and use beyond social purposes and also provides exemption to the requirement for a tachograph. Graham Groom (BCC Fleet Manager 07885 622175) can advise.

All LA minibus drivers must have passed the BCC minibus test. Academy minibus drivers are advised to take the BCC minibus test or undertake MiDAS training and keep that training current (3 yearly refreshers).

Refer to [National Guidance](#) : 4.5b Transport in minibuses
4.5a Transport general considerations
4.5d Seat belts and child restraints

15 Farm Visits

Refer to [National Guidance](#) : 7g Farm visits

Also to EVOLVE National Library: '[Preventing or controlling ill health from animal contact at visitor attractions - Advice to Teachers](#)'

Farming & Countryside Education: www.face-online.org.uk

16 Water-Margin Activities

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.**

* 'gentle' = hardly moving at all and 'shallow' = means up to the knees of the participants.

The leader must decide whether the activity:

- Falls **within** the definition above - in which case the below guidance applies **or**
- Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and [Section 23](#) applies.

[Group Safety at Water Margins](#) must be made available to all supervising adults in advance.

For **paddling in the sea** (gentle, shallow water with no intention to swim), considerations are:

- A minimum of 2 staff and a ratio of 8:1 participants to staff
- The ability to account for all participants at all times
- An additional person qualified to carry out CPR
- Thorough knowledge of the conditions of the beach
- An agreed and restricted paddling area taking into account: age, weather and water conditions and safety provision
- Emergency signals - visual and audible - and the need for a whistle and 1st Aid equipment.

As with all visits, where appropriate there should be an approved alternative 'Plan B' for where conditions dictate, and for which parental consent has been obtained. LA approval is not required

for water-margin activities, but the leader must have previous relevant experience, and judged competent to lead the activity by the EVC and/or Head.

17 Residential Visits

Residential visits create powerful learning opportunities for young people, which can lead to step changes in an individual's personal development and confidence.

Refer to [National Guidance](#) : 4.2b Residentials
4.2a Group management and supervision

18 Overseas and Exchange Visits (for Expeditions see [Section 26](#))

Refer to [National Guidance](#) : 7r Overseas visits
7f Exchanges and home stays
3.2g Vetting and Disclosure and Barring Service (DBS) Checks
(Page 6 of 3.2g explains three exchange and homestay settings and DBS considerations)

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office (FCO) website: <https://www.gov.uk/foreign-travel-advice> and relevant FCO information should be circulated amongst the staff team.

From 1 April 2016 all travellers wishing to enter the US under the Visa Waiver Programme will need to hold an ePassport. British passports issued since October 2006 are ePassports.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See <https://www.gov.uk/european-health-insurance-card>

The following link provides advice for school groups visiting the UK by coach: <https://www.gov.uk/government/publications/school-parties-visiting-the-uk-by-coach/school-groups-crossing-the-uk-border-by-coach>

19 Weather, Clothing & Survival

The leader must act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate 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);

An agreed 'Plan B' should be a ready alternative.

20 Swimming

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

Swimming pools (lifeguarded) including hotels

See <http://oeapng.info/downloads/specialist-activities-and-visits/> and then doc 7x Swimming Pools

LA Approval is not required

Open water swimming (i.e. not in a swimming pool)

LA Approval is required via EVOLVE. (A 'Note' should be added to the EVOLVE visit form for the attention of the LA detailing the activity).

A key question for the leader is to consider is how emergency medical aid can be summoned and the time it would take to arrive at the scene.

Open inland water such as rivers, lakes, reservoirs or canals present additional risks to those of a swimming pool. These include vegetation and other underwater obstructions, sudden changes in depth and pollution. Swimming in the sea carries additional risks which may include low water temperature, strong winds, undertow and tide.

Particular consideration should be given to the following factors:

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

The designated lifeguard must be dedicated to the group, and the location used must fall within the RNLI/RLSS definition of a 'safer bathing area'. Local advice must always be sought.

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

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

21 Definition of an 'adventurous activity'

The following activities are regarded as 'adventurous' and require LA approval:

- 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 and abseiling (including indoor climbing walls) including
- River/gorge walking or scrambling
- Coasteering / coastal scrambling / sea level traversing
- Underground exploration
- Shooting / archery / paintballing
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- Cycling – on and off road
- Ice skating (rink)
- 'Extreme' sports and other activities involving skills inherent in any of the above

'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 Outdoor Education Adviser if you think this might apply. For level of competence required to lead in open country see [Section 24](#)

The following activities are not regarded as adventurous and therefore do not require approval by the LA but must be supervised by a member of staff who has previous relevant experience:

- 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 and tourist attractions
- Pedal go-karts
- Farm visits, museum, library, etc.
- Local traffic survey
- Physical Education and sports fixtures (other than the above)
- Water-margin activities as defined in [Section 16](#)

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

22 Adventurous Activities

This section is applicable to all adventurous activities except the following, for which separate guidance applies:

Water-based activities	- Section 23
Open country activities	- Section 24
Snowsports	- Section 25
Overseas expeditions	- Section 26

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 via EVOLVE to lead the activity.

23 Water-based Activities

For clarification between water-margin and water-based activities see [Section 16](#)

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 16](#)
- 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 [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 via EVOLVE to lead the activity.

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 and other site users.

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.

24 Open-country activities

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 Outdoor Education Adviser if you think this might apply.

Open-country activities are 'adventurous' and therefore these visits requires 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 [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 below

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

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

- a) **For leaders of walking groups outside the UK or Ireland**, please contact the Outdoor Education Adviser for further guidance.
- b) **For leaders of walking groups in mountainous terrain within the UK and Ireland**
 - Mountain Leader Award (Summer or Winter as appropriate) www.mltuk.org **or**
 - A written statement of competence by an appropriate technical adviser - see [Section 28](#)
- c) **For leaders of walking groups in summer conditions in non-mountainous hilly terrain** (Known variously as upland, moor, bog, hill, fell or down), with well defined obvious boundaries, such as roads and coastlines, and where any hazards within it are identifiable and avoidable, and where wild camping or movement on steep ground is not involved.
 - Walking Group Leader Award www.mltuk.org **or**
 - A written statement of competence by an appropriate technical adviser - see [Section 28](#)
- d) **For leaders of walking groups in terrain 'easier' than that defined in c)**
 The leader must demonstrate an appropriate level of competence. This may include one or more of the following:
 - Countryside Leader Award. See www.countrysideleaderaward.org
 - Sports Leaders UK Level 2 Award in Basic Expedition Leadership (BEL).
See www.bst.org.uk
 - Completion of a suitable 'Leader Training' Course.
 - A written statement of competence by an appropriate technical adviser see [Section 28](#)
 - Evidence of recent, relevant experience, appropriately corroborated.
 - An assessment of competence (written or implied) by the Head of Establishment.

25 Snowsports

Snowsports (eg skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires LA approval.

Given school compliance with charging and remissions regulations (NG ref below), there are advantages to snowsports taking place during term time as opposed to during the establishment holiday period. These include: greater choice generally, less queueing 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 and considerable cost savings through avoiding high season (possibly allowing more young people to participate).

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 and must have previously accompanied at least one educational snowsports visit.

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 (ie. 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 **or**
- The Alpine Ski Leader Award (ASL) www.snowsportscotland.org **or**
- A statement of competence by an appropriate 'technical adviser' - see [Section 28](#)

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

- The Snowboard Leader Award (SBL) administered www.snowsportscotland.org **or**
- A statement of competence by an appropriate 'technical adviser' - see [Section 28](#)

See EVOLVE for the current good practice [guidance on helmets for snowsport activities](#).

Pupils may only take part in off-piste activities if:

- a) under the direction of a suitably qualified local instructor, AND
- b) they will remain within the designated controlled areas, AND
- c) off-piste activities are specifically included within the visit insurance policy, AND
- d) a NOTE is added to EVOLVE in advance of the visit, confirming that the above criteria are/will be met.

Important: Owing to unacceptable liability waiver requirements, currently LA establishments must not use the following resorts: Vail, Beaver Creek, Breckenridge, Keystone and Heavenly Lake Tahoe, until further notice. For other resorts in USA or Canada, the establishment must check the liability position prior to making a commitment.

Refer to [National Guidance](#) : 3.2c Charging for school activities
7v Snowsport visits

26 Overseas Expeditions

Overseas Expeditions typically involve journeying in remote areas of the world and/or in developing countries.

Given the stringent requirements on Overseas Expedition providers, establishments should allow up to 18 months for LA approval. 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 **or**
- b) Provides a statement of compliance with Guidance for Overseas Expeditions, Edition 4
<http://www.national-library.info/download.asp?fileid=1585>

Note: If the provider being considered is not a British registered company and therefore not subject to British law, contact the Educational Visits Adviser at the earliest opportunity before making any commitment.

For providers that do not hold an LOTC Quality Badge, 'Guidance for Overseas Expeditions, Edition 4' 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.

Staffing arrangements apply as set out in section 11 Staffing and Supervision.

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

Refer to [National Guidance](#) : 7q Overseas expeditions

27 Emergency Procedures

Staff involved in a visit must be aware of and adhere to their establishment's policy on emergency procedures. As part of the planning and preparation for all visits, 2 emergency contacts should be identified on the EVOLVE form [Role of the Emergency Contact](#)

For visits that take place outside normal establishment hours an appropriate [Serious Incident Action Card](#) must be with the Visit Leader at all times. Copies of the [Incident Log](#) and [Incident Recording Sheet](#) should also be taken on the visit by the Visits Leader.

Note: The LA will work alongside the academy in support of the help provided by the academy and its insurers during the response phase of the emergency. The response and communications during the emergency may be significantly more effective where the visit has been approved on Evolve prior to the visit taking place. Academies are expected to have an emergency plan which clearly identifies the circumstances under which the LA will be asked to support. Even if support is not requested, the LA should be informed of an emergency.

28 Approval of staff to lead an adventurous activity

Staff who wish to **lead** (ie. supervise or instruct) an adventurous activity, as defined in [Section 21](#), 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.

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, and:

- is appropriately qualified through the relevant National Governing Body, **or**
- has a 'Statement of Competence' from an appropriate 'technical adviser' – see below.

For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Body. For further clarification regarding a technical adviser 'Statement of Competence' please contact the Outdoor Education Adviser.

In some cases approval may be granted where no qualification is held, but the person concerned is deemed by the LA to have a sufficient level of competence in addition to recent relevant experience.

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 may be the responsibility of Head of Establishment and/or EVC.

29 Using an External Provider

An 'External Provider' delivers an element of instruction, staffing, or guiding, for example:

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

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

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc
- Campsite
- Museums, galleries, etc
- Tourist attractions
- Theme Parks
- Coach, Train, or Airline company
- Swimming Pool
- Climbing Wall where instruction is provided by a member of your establishment's staff with an approved Activity Leader Form (ALF) ([Section 28](#) applies)
- 'Volunteer' instructor of adventurous activities (see below)

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Head. The LA does not 'approve' external providers or tour operators. Establishments will find it useful to 'Search by Provider' on EVOLVE, and liaise with other LA establishments that have used a particular provider.

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

- a) The Provider holds an LOfC Quality Badge 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 LOfC Quality Badge, then a Provider Form is still required.

Note: EVOLVE automatically identifies providers that hold an LOfC Quality Badge.

For Providers that hold an LOfC Quality Badge www.lotcqualitybadge.org.uk

No further action is necessary, other than to check the suitability of the provider/venue in relation to the intended learning outcomes for the particular group.

For Providers that do not hold an LOfC Quality Badge www.lotcqualitybadge.org.uk

Procedure

- Download a [Provider Form](#) from EVOLVE. (Evolve Resources and tab 'Forms')
- 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.
- It is not necessary to attach the Provider Form to EVOLVE.

Important: 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 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.

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.

In some instances, for example where an establishment intends to use an 'external', **voluntary** individual for services, then this person may be regarded as a temporary member of staff and the procedure outlined in [Section 28](#) may be appropriate.

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 [Section 26](#)

For completion by 'external providers' used by
Buckinghamshire County Council establishments

Providers that do not hold an LOTC Quality Badge and that are to be used by establishments Buckinghamshire County Council, are required to complete and return this form in advance of the establishment making a commitment.

Establishment..... Staff member in charge

Date(s) of visit Name of provider

The provider or tour operator providing services to the establishment named above is asked to give careful consideration to the statements below and sign in the space at the end of the form to indicate that the standard of service will meet the conditions listed. Please tick all specifications you can meet, indicate by a cross any you cannot meet, and write N/A against any specifications which do not apply to your provision.

Section A should be completed for all visits. Sections B (adventure activities), C (tour operators) and D (expeditions) should also be completed if applicable.

SECTION A - ALL VISITS

Health, Safety, and Emergency Policy

1. The provider complies with relevant health and 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. ☐
2. Accident and emergency procedures are maintained and records are available for inspection. ☐

Vehicles

3. All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used. ☐

Staffing

4. All reasonable steps are taken to check staff who have access to young people for relevant criminal history and suitability to work with young people. ☐
5. There are adequate and regular opportunities for liaison between establishment staff and the provider's staff and there is sufficient flexibility to make changes to the programme if necessary and the reasons for such changes will be made known to establishment staff. ☐
6. The provider has never been dismissed from any employment or had a contract ended ☐

Insurance

7. The provider has public liability insurance for at least £10 million with a clause giving 'indemnity to principal'. ☐

Accommodation (if provided)

8. UK accommodation is covered by a current fire certificate or advice has been sought from a fire officer and implemented, and a fire risk assessment has been completed. ☐
9. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned. ☐
10. There are appropriate security arrangements to prevent unauthorised persons entering the accommodation. ☐
11. Separate male and female accommodation and washing facilities are provided and staff accommodation is close to participants' accommodation. ☐

SECTION B - ADVENTURE ACTIVITIES AND FIELD STUDIES IN OUTDOOR ENVIRONMENTS

12. Adventure Activities Licensing Authority (AALA) Licence covering dates of visit ☐ YES ☐ OUT OF SCOPE
13. If YES, AALA Licence number R

For AALA licensable activities in the UK, the specifications in this section are checked as part of the AALA inspection. However, providers licensed with AALA are asked to consider these specifications with respect to any activities or aspects of provision not covered by the licence.

Activity management

14. The provider operates a policy for staff recruitment, training and assessment which ensures that all staff with a responsibility for participants are competent to undertake their duties. ☐
15. The provider maintains a written code of practice for activities which is consistent with relevant National Governing Body guidelines and/or, if abroad, the relevant regulations of the country concerned. ☐
16. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be undertaken, or staff have had their competencies confirmed in writing by an appropriately experienced and qualified technical adviser. ☐
17. Where there is no National Governing Body for an activity, the provider has a Code of Conduct for that activity which is in line with current good practice within the UK, and this includes appropriate instructor competencies. ☐
18. Participants will at all times have access to a person with an appropriate First Aid qualification. Staff are practiced and competent in accident and emergency procedures. ☐
19. There is a clear definition of responsibilities between providers and visiting staff regarding supervision and welfare of participants. ☐
20. All equipment used in activities is suited to task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary. ☐

SECTION C - TOUR OPERATORS

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

22. Sections A and B of this form, as appropriate, have been completed to show that checks have been made. Records are available for inspection. ☐
23. The Tour Operator complies with the package travel regulations, including bonding to safeguard customers' monies. ☐
24. ATOL, ABTA or other bonding body name and numbers..... ☐

SECTION D - OVERSEAS EXPEDITIONS

25. The provider complies with 'Guidance for Overseas Expeditions, Edition 3' (GOE3). ☐

If any of the above specifications cannot be met or are not applicable, please give details:

Details of any other accreditation, eg with National Governing Bodies, tourist boards, etc.

DECLARATION

I hereby certify that I am an authorised signatory to enter into this Agreement and to bind the said company, firm, person or corporation to the terms and conditions herein.

Signed Date

Name (print) Position in organisation.....

Full name and address of company, firm, person or corporation.....

.....

Tel Fax..... E.mail

EVENT SPECIFIC PLAN (ESP)

(What are the really important things we need to do to keep ourselves safe? The Visit Leader should involve the accompanying staff, and also participants where possible.)

Visit Leader..... Visit to Carried out by Date

ISSUE	HOW TO MANAGE IT	WHO TO BE INFORMED		
		PARENTS	STAFF	PARTICIPANTS

You must also ensure that appropriate persons are aware of any Generic procedures, but these do not need to be repeated here

Serious Incident Action Card for the Group Leader

- Summon emergency services if appropriate
- Provide first aid / prevent further injury
- Account for all party members including staff
- Delegate a responsible adult to take care of uninjured members of the party
- Instruct no-one to talk to media and secure inappropriate use of mobile phones or email and social media (e.g. Facebook, Twitter etc)
- Activate the emergency procedures by calling

01183 589 332 (+441183 589 332 if calling from abroad)

(This is the Bucks Fire and Rescue Control Room number) **YOU MUST REQUEST THAT THE BUCKINGHAMSHIRE COUNTY COUNCIL'S DUTY RESILIENCE OFFICER IS PAGED.**

Be prepared to provide the following information which will be passed to the duty Resilience Office for Buckinghamshire County Council by Buckinghamshire Fire and Rescue Service.

- The complete telephone number which we can call you on (including national /area codes etc)
- your name
- the name of your school /party
- the nature of the emergency

Ensure you leave this information before any further discussion takes place, in case you are cut off.

If possible, also provide :

- your location
- further details of the nature of the incident
- any other contact numbers that can be used

In order that you can be contactable at all times and to enable you to lead and coordinate all necessary actions you should delegate party leadership to the Deputy Leader.

Log-keeping:

A copy of the Incident Record sheet can be used to note down the information Record:

- further and full details of the incident, how and why it happened so far as can be established at this stage
- all action taken and conversations held

You should not make any public statements about the incident without prior agreement of a statement with the County's Incident Control Team.

Ask those in the group to write individual statements of what they saw / heard in relation to the incident

Depending on the circumstances some or all of the following actions may be required:

- Retain all equipment involved in an accident or incident in an unaltered condition - unless it is required by the police
- Begin to make appropriate arrangements for those not injured to return home immediately
- Arrange any support for the staff and injured in hospital
- Obtain necessary documentation from the medical authorities e.g. death certificates, medical certificates indicating how injured may travel home, and case histories including x-rays
- Retain receipts for all expenditure connected with the incident.

Contacts

Buckinghamshire County Council Serious Emergency Number	Tel: 01183 589 332
Outdoor Educational Advisor	Robert Williams Tel: 07703 120 580 Email: rwilliams@buckscc.gov.uk
County Educational Visits Coordinator	Sian Hevizi Tel: 01296 382321 Email: shevizi@buckscc.gov.uk
Lead for Outdoor Networks, Forest Schools and onsite LOTC	Julie Lloyd-Evans Tel: 0330 303 0101 Email: Julie.Lloydevans@alfcharity.org
EVOLVE	www.bucksccvisits.org
Health & Safety	HR Service Desk Tel: 01296 382233 Email: hrrservicedesk@buckscc.gov.uk
Insurance	Rachael Ruddy Tel: 01296 383197 Email: rruddy@buckscc.gov.uk
Transport	Graham Groom Tel: 07885 622175 Email: ggroom@buckscc.gov.uk
Resilience	Andy Fyfe Tel: 01296 382937 Email: afyfe@buckscc.gov.uk
Ali Arber - PE Consultant	In the office Thursdays only Tel: 01296 383342 / 01494 475333 Email: alrber@learningtrust.net
Mandy Carey – Swimming Consultant	In the office Weds & Thurs only Tel: 01296 383342 / 01494 475333 Email: c-acarey@learningtrust.net