

# REMOTE

# SUPERVISION

Guidance on the supervision of groups operating independently



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## CONTENTS

Acknowledgements . . . . .	2
Foreword . . . . .	3
What is remote supervision? . . . . .	4
Factors affecting the method of remote supervision . . . . .	8
How remote should you be? . . . . .	14
Supervision of multiple groups . . . . .	16
Ratios . . . . .	18
Methods of remote supervision . . . . .	20
When it doesn't go to plan . . . . .	34
Remote supervision checklist . . . . .	36
Case studies . . . . .	38
Example late back procedure . . . . .	47
Appendix 1: Monitoring card . . . . .	48

## FOREWORD

The notes contained in this document are not intended to be prescriptive rules, as Mountain Training has no wish to 'govern' the remote supervision of groups of young people in the outdoors. Rather, they are an attempt to collate current practice and should be used as guidelines that seek to explore the range of appropriate methods of supervision within this potentially contentious area. Various organisations that provide remotely supervised activity will have their own framework of safety measures and existing practice to which the reader is additionally referred.

It is intended that the notes should provide useful guidance for both individuals and organisations wishing to undertake any form of remote supervision of groups in the hills. There are an increasing number of educational/training situations that use the experience of remote travel as a developmental or assessment opportunity and many of these are based upon the premise of 'independent' operation. It should not be forgotten that the skills of remote camping fall within this topic and require similar consideration regarding adequacy of prior training and distance/frequency of supervision to those progressing across the terrain.

## WHAT IS REMOTE SUPERVISION?

A level of indirect supervision which allows a group to undertake an independent journey/activity whilst ensuring the organising agencies/supervisors can exercise their duty of care as appropriate.

Remote supervision is not something new. The progressive withdrawal of supervision is a very common educational process and has been used for a significant amount of time. With an increased emphasis on Duty of Care, and more cases of litigation being pursued, it is an area of work that needs careful consideration, realistic/accurate planning and both prior and ongoing risk assessment.

In law a 'duty of care' is a legal obligation that is imposed on an individual, requiring that they adhere to a standard of reasonable care while performing any acts that could foreseeably affect or harm others.

The law does not expect you to eliminate all risk, but you are required to protect people as far as is 'reasonably practicable.'

So in essence, we need to consider what we are going to do and the impact this may have prior to the event. A robust risk management process provides us with a structured way of doing this and ensures that any measures to protect people are in place.

This means that as a supervisor you need to be able to know where your group is all of the time\*, and be able to predict what they are likely to do next.

\* This may be an area rather than a point location, depending upon the actual level of experience and competency of the group, rather than the supervisors' perceived expectations of the group.

Photo: Lupine Adventure Co-operative.



Photo: Lupine Adventure Co-operative.

#### Duty of care

**“Leaders owe a duty of care to others who are closely and directly affected by their actions. Leaders, and those who deploy them, need to bear in mind the possible consequences of those actions and/or advice. This duty of care is greater for leaders who work with young people or novices and may reduce when responsible for more experienced groups.”**

National Guidelines  
MTUK

The National Guidelines available at [www.mountain-training.org/downloads](http://www.mountain-training.org/downloads) is an invaluable source of information.

Several well documented events are poignant reminders to all of what can go wrong. Unfortunately, these events attract so much publicity that they tend to overshadow lots of other potentially serious occurrences which through either good management or luck had much happier outcomes, so it is worth presenting a balanced view. Some examples can usually be found on [www.grough.co.uk](http://www.grough.co.uk) or other websites and outdoor magazines.



Photo: Pete McCourt of Ocean Rock Adventure.

#### Formal Risk Management

**“Risk is the potential to gain or lose something of value. The presence of risk creates uncertainty. Potential losses may include physical, environmental, mental, social or financial losses. Potential gains may include knowledge, skills and attitudes to assist people to achieve their potential.”**

Haddock C.,  
*Outdoor safety – Risk,*  
New Zealand Mountain  
Council, 2004

In order to give some structure to their procedures most people use some kind of written format to check that all training needed prior to remote supervision has been completed, to highlight any unusual issues associated with a particular group or route and finally to document any issues that develop during the expedition. These may be in the form of checklists or ‘Risk Benefit Analysis’ type documents initially followed by a specific pre-trip risk assessment where local issues or issues concerning individuals in the group are highlighted.

Many people find that keeping some form of simple expedition logbook or diary is a useful way of providing a record of proceedings. This forms the background – weather forecasts – group morale and fitness – specific briefings or changes to the overall plan, to ensure all the supervisory team are aware of any issues. It is also very useful retrospectively not only to aid future planning but also in the event of a problem or incident developing.

In many cases the organisation managing a remotely supervised activity may provide the initial framework and checklists whilst the keeping of records of the specific activity is down to the person in charge in the field. It has to be said that notes made at the time are also very helpful should any form of report be required following a trip whether this is required by the organisation or because of an incident.

# FACTORS AFFECTING THE METHOD OF REMOTE SUPERVISION

There are five key factors to consider as part of our risk management process which will help with our decision on the most appropriate method of remote supervision to use:

- Supervisor's skill/knowledge and knowledge of participants.
- Experience/ability of the group.
- Familiarity with the area.
- Environmental/weather conditions.
- Appropriateness of the route.

## 1. SUPERVISORS' SKILLS AND KNOWLEDGE

### KEY QUESTIONS –

- > Do I as the supervisor have the necessary experience and/ or training to effectively keep myself safe and make clear informed decisions that will help to keep groups safe?
- > Am I up to date with current good practice with regards to supervising others?

Supervisors should match themselves to certain criteria before taking on the responsibility of this satisfying, but sometimes daunting task. They must have a very clear view of the objectives of any group undertaking an 'unaccompanied journey'. They should also have thorough evidence of appropriate competence within the group and be able to predict the likely reactions of that group to adverse weather or other difficulties that may arise.

Supervisors need to plan ahead and consider actions that may be necessary in response to changing circumstances.

Ideally supervisors should also hold external confirmation of their ability to operate competently for the appropriate terrain that the group, other assistants and they, as supervisors, may encounter e.g. National Governing Body Award, Scout permit, Military or similar qualification. In some circumstances this may in fact be a legal requirement such as when working abroad. Alternatively, they should have clearly demonstrated levels

*Photo: Lupine Adventure Co-operative.*

of competence and experience that might be considered as equivalent. According to the Health and Safety Executive there are four ways to demonstrate the competence of leaders.

These are:

- To hold the relevant qualification
- To hold an equivalent qualification
- To have received appropriate in-house training
- To be competent through experience

Mountain Training endorses this view, while emphasising that national awards are the key components in such an approach, i.e. making judgements about levels of experience and delivering in-house training is best left to appropriately qualified and experienced individuals. Refer to 4.1 of the National Guidelines on [www.mountain-training.org/downloads](http://www.mountain-training.org/downloads).

Terrain can be described as; cultivated lowlands crossed by footpaths and byways (e.g. the South Downs), moorland and heath (e.g. Dartmoor or the Derbyshire Dark Peak), or mountainous regions (e.g. the Lake District or Snowdonia). We could refer to these as Levels 1-3 and they generally conform to systems used by organisations such as the Scouts, DofE Award etc. as well as reflecting the existing system of Mountain Training and BEL Awards. Refer to latest matrices on AALS website or the National Guidelines (as directed above).

It is important to note that leadership qualifications on their own do not necessarily testify to an ability to manage remote supervision. An overall breadth of experience in the relevant terrain, the preparedness and ability to deal with emergencies, the amount of training/practice in the techniques of remote supervision as well as the familiarity with the rationale of the activity and likely participant behaviour all contribute.

Within any framework, and without being too prescriptive, there should be room to accommodate suitably trained/qualified and experienced assistants to work with those in overall charge. This will enable assistants to gain valuable relevant experience and may encourage them to seek suitable further training and/or qualifications in the future.

## 2. KNOWLEDGE OF THE GROUP

### KEY QUESTIONS –

› Do I know enough about the training, experience, ability and attitude of the group to be comfortable remotely supervising them, and how does this knowledge affect the supervision strategies I use?

› Is the group sufficiently skilled, well prepared, and equipped and are clearly understood safety protocols in place?

The supervisor should assess his/her knowledge of the group(s) undertaking the proposed activity. Ideally the supervisor will have been involved in the training of the participants and know both the level of their hill skills and something of their personality traits. In some aspects the supervisor may have to rely on others for information, so he/she will also need to decide how reliable this information is and whether or not to use it!

Planning should not only include an appraisal of the competence and reliability of the group, the individuals within that group and their possible reactions to adverse or stressful situations but also disclosed medical information (may include behavioural issues) and some confirmation of agreed protocols for various situations. Involving the group in the route planning stages and discussing contingencies may allow supervisors to anticipate the group's actions on the ground.

This knowledge of the group should extend to establishing the aspirations of the group and the goals of the activity to be undertaken. Groups may for instance need an 'Emergency Plan' with written prompts. Many experienced mountaineers carry a prompt card for first aid so it would be a sensible precaution for relative novice teams to carry 'emergency action cards', this would also help the supervisor decide on what action they might take if the team on the hill are following known protocols.

It would also be prudent to have some familiarity with the equipment being worn and carried by participants including, for instance, the number, type and quality of maps and any emergency kit.

## 3. FAMILIARITY WITH THE AREA

### KEY QUESTIONS –

› How well do I know the area and the specific route?

› What hazards are commonly encountered in this area?

› What hazards and/or issues are unique to this area?

An important factor for consideration with regard to remote supervision is the amount of prior knowledge any supervisor has of the proposed expedition area. Ideally they will have some direct experience and knowledge, or at least have done considerable research on the area.

Working knowledge of the expedition area will obviously be a distinct advantage when it comes to the practicalities of making a decision on which methods of supervision to adopt at which points and their intensity of its application. If there is little direct local knowledge of the proposed area within the supervisory team it would be appropriate to do in-depth research of the area and err on the side of caution during the actual event. Simply by walking the ground beforehand we can begin to anticipate problems and have measures in place ahead of time. Having a member of the supervisory team preceding the group(s) along a route on the day can highlight problems that are not apparent from map inspection alone. Details such as invisibility can be difficult to determine from a map alone and, particularly on convex slopes, the supervisor may find that direct observation from a chosen point is not possible. There is also invariably more 'dead ground' than one imagines from the map, and groups often choose sheltered and thus invisible sites to rest, eat etc. Similarly current mobile phone coverage is a useful aspect of local knowledge, particularly signal blackspots. The supervisor should take extra care to be aware of any particular areas of 'risk', access restrictions and environmental features that may not be immediately apparent from a study of maps/guides.

When working within a larger organisation (such as the DofE Award) it is often possible (or may be a requirement) to obtain local knowledge of an area by involving a local panel assessor or other technical advisor.



Photo: Pete McCourt of Ocean Rock Adventure.

## 4. ENVIRONMENTAL AND TERRAIN CONDITIONS

### KEY QUESTIONS –

> Does the forecast reflect what is happening?

> What is the visibility like?

The weather will have a huge impact on how we choose to supervise our groups, and of course it changes from minute to minute in the upland environment.

Part of the required skill set of the remote supervisor is the ability to accurately predict the likely environmental conditions along a route. This will often involve seeking several forecasts from different sources and adapting these in the light of observational skills and previous experience. At the planning stage it is useful to evaluate the impact of high winds, heavy rain and even snowfall on the projected route. If the planning takes place before a prediction about the weather can be made it would seem prudent to make a Plan A that can be completed even in the worst conditions. Plan B can then be moved to if conditions are better!

## 5. ASSESSMENT OF THE ROUTE

It is important to examine a planned route from the perspective of its suitability for remote assessment. It is thus useful to establish certain criteria beforehand.

For example:

- Where are the best meeting points?
- Which are the critical route choice decisions?
- Are there any sections where navigation may be particularly difficult (e.g. areas of commercial forestry, unmapped or multiple paths, locations where precise compass work is needed)?
- What happens if the group makes the wrong choice? Where are they likely to end up?
- Are there any particular hazards like stream crossings, a line of cliffs, dangerous roads, railways etc?
- Where can I wait for them without them being able to see me all day?
- What about safe, considerate, vehicle parking or mountain bike access by appropriate right of way, for ease of approach?
- How will adverse weather (high winds, heavy rain, poor visibility) affect the ability of the group to complete the route? Are there alternatives?
- Will lack of visibility make remote supervision difficult? How likely is this?
- Modern online 'satellite' mapping often allows the checking of detail visible from the air such as the existence and state of paths, lakes and buildings (e.g. [www.wheresthepath.org.uk](http://www.wheresthepath.org.uk)).
- Often the causes of an accident or incident can be followed back to a defect in the original plan. A decision may have to be made as to the desirability of changing a route selected by a group to satisfy the needs of safe remote supervision.

## HOW REMOTE SHOULD YOU BE?

The general requirement is that participants receive sufficient training and are confirmed as competent to operate remotely and safely in appropriate terrain.

The five key factors discussed above and the outcomes of the key questions will determine what the appropriate distance is between the supervisor and the group, with the answer being infinitely variable.

Increasing the degree of remoteness of supervision is likely to increase the risk. Bear in mind that the ability of the supervising person to intervene in a developing emergency (e.g. getting the wrong side of a watercourse, starting down dangerous terrain) may be extremely limited unless they are in close proximity or in direct line of sight with working radio/phone contact with the group.

If a group of novice navigators involved in an orienteering-style 'star exercise' are asked to visit several marked points in small groups and to meet back at the start at a specified time, they could be considered to be unsupervised for the duration of the exercise. The supervisor must make a sound judgement as to the ability of the group and be able to at least visualise their likely progress. They may be temporarily out of sight but nevertheless the supervisor should be aware within a few minutes that something is amiss through the use of whistles issued beforehand or some other contingency plan.

*Photo: Lupine Adventure Co-operative.*

At the other end of the spectrum the supervisor may be some distance away awaiting a phone message containing information about the group's progress. Clearly this would be a situation where the supervisor has considerable faith in the group and their ability, within a reasonable time scale, to do something themselves to rectify the situation should any problems occur. The abilities assumed in this type of group need progressive training and might include elements such as first aid, navigation, evacuation of a casualty to a safe area, improvising an emergency shelter and ways to summon assistance.

A further complication is that in some circumstances there is a degree of pressure from the objectives of the activity for the participants to be operating independently. This may be part of the supervisor's decision making process but should not interfere with judgements made for sound safety reasons.

Thus for any given situation the underlying question for the person supervising should be: 'Is the level of preparedness and the proximity of supervision appropriate for the required objective?'



A topographic map of a rural area, likely in the UK, showing various landmarks, roads, and terrain features. The map is overlaid with a teal banner at the top left containing the text 'SUPERVISION OF MULTIPLE GROUPS'. There are several handwritten annotations in red ink on the map, including '09:30' and '11:45'. The map shows a network of roads, including 'High Quarbach Lane' and 'Dent Station'. There are also various geographical features like 'Shake Holes', 'Caves', and 'Hills'.

## SUPERVISION OF MULTIPLE GROUPS

Teams of supervisors working together to remotely supervise a number of groups can increase effectiveness and flexibility. Supervisors should be aware that this requires a significant amount of forethought, planning and coordination.

### TEAM LEADER

An individual should be nominated as team leader. The team leader must have a clear understanding of the current situation at all times. This can be achieved through effective application of the principles mentioned below:

- Sound operating methods
- Flexibility within those methods
- Two-way flow of information
- Knowledge of the group, environment and other supervisors
- Confidence and ability to make timely decisions

In each of these cases they will be applied to a slightly different situation as some of the factors will change and may include:

- Various supervisors' abilities
- Supervisors' knowledge and understanding of how they are to operate
- Movement of groups between supervisors
- Methods of communication
- Logistics/transport

### GROUP SUPERVISORS

Group supervisors should be fully aware of the implications of their actions and keep the big picture in mind. Working within agreed operating procedures will allow other supervisors to make clear and safe decisions on courses of actions without unconsidered consequences.

Staying in contact with each member of a supervising team may cause its own issues, particularly during any 'searching phase' when looking for an overdue group/s. The carefully considered use of radios could well be of benefit in areas of poor mobile phone reception. That said, even radios can have reception difficulties.

There are many ways of recording the whereabouts and morale of multiple groups. Please refer to the monitoring card in Appendix 1 as an example.

Photo: supplied by Lupine Adventure Co-operative.

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# RATIOS

In the event of there not being enough competent people/leaders to provide safe remote supervision, modification or termination of the venture is recommended.

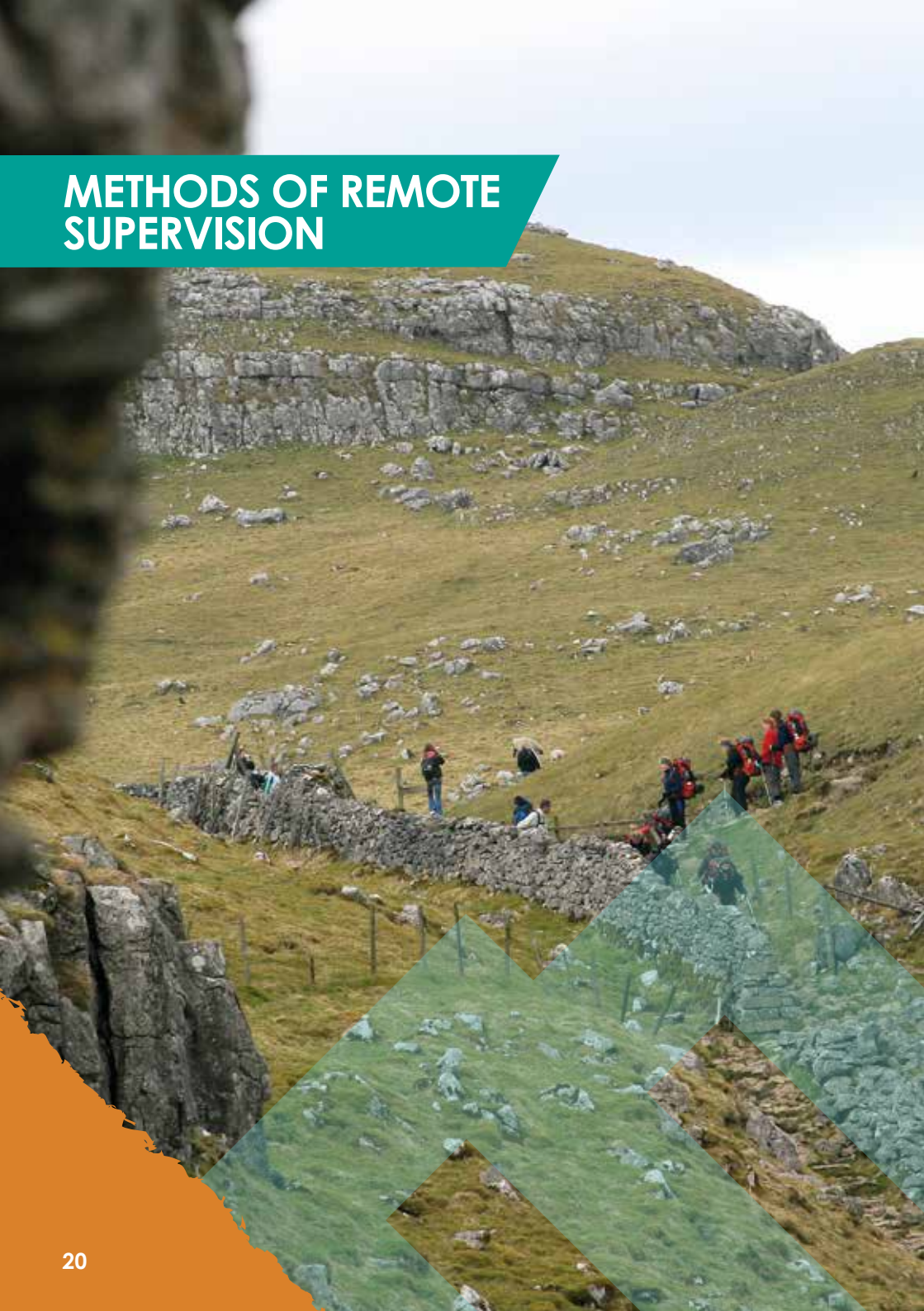
It is practically impossible to define actual figures for providing appropriate supervision to several groups simultaneously due to the variability of the activity. Whilst having one competent supervisor per group might appear to offer the ability to move in and take over in an emergency there are situations where groups split up. Alternatively if say 10 relatively competent participants are undertaking a solo night navigation exercise, having a shadow for each would appear to be overkill.

Certain organisations and those authorising activity may stipulate maximum ratios to provide a simple framework that covers most scenarios. It would seem important that the person in overall charge in the field (and in fact all those involved in the supervision) are confident that their numbers and level of competence is appropriate for both current and expected conditions and for the numbers and abilities of participants involved.

It should also be noted that there are further issues surrounding the 'flooding' of an area with a number of remotely supervised groups that need to be considered. The impact on local people, other visitors and the participants themselves of meeting multiple groups can be detrimental.

*Photo: Pete McCourt of Ocean Rock Adventure.*

## METHODS OF REMOTE SUPERVISION



All of the aforementioned will help the decision making process of which methods to use to remotely supervise the group/s. As participants' skill levels increase, they need the opportunity to develop independence and with that take on their own responsibilities for decision making. This process will mean that supervisors will need to understand how to gradually shift the decision making process from themselves to the students in a manner that develops them over a suitable period of training.

The most effective remote supervision comes from a combination of methods that match the requirements on the day, with the most effective supervisor usually being the one that is actively out on the ground and making decisions based on the conditions found on that particular day with that specific group. But sometimes being out on the ground isn't the best place!

This section contains a summary table for each method highlighting their key advantages and disadvantages.

### CHECK POINTS

The underlying framework of a remotely supervised journey usually involves a number of prearranged checkpoints. The number and frequency of these will vary and one of the skills of the remote supervisor is achieving a good balance. Experience would indicate that the number of ways that the system can break down is almost infinite ("We waited at the checkpoint just like you said, in fact we waited for five whole minutes," to "I just snapped my Achilles tendon trying to bump start my car to move on to the next checkpoint!").

Even the simplest of arrangements can go wrong and in some cases lead to the rescue services being called out. Even worse, a genuine call-out may be delayed due to inadequate procedures. In the case of things going wrong, and a prearranged rendezvous being missed either by the group or a member of staff, an alternative course of action should be in place to provide adequate back up e.g. using a mobile after a predetermined interval.

*Photo: Lupine Adventure Co-operative.*

Incident reports are full of instances of missed rendezvous, (most frequently but not exclusively) due to bad weather, sometimes with groups led by highly experienced instructors passing within meters of each other! Whilst meeting the group on a summit to provide encouragement (not to mention exercise for the supervisor) may be appropriate in good conditions, waiting in a big minibus safely parked at a road crossing is often more likely to work and may be a more appropriate location to provide advice regarding route choice as well as supervision for the dangerous activity of crossing the road.

The value of meeting a group periodically and gauging their physical and mental state cannot be underestimated; particularly during challenging conditions or training periods. Clear guidelines should be given and adhered to in the event of a missed checkpoint for teams and supervisors. I.e. teams should be informed that if they arrive at a checkpoint early, wait until the appointed time and still don't make contact they should leave a drop card or similar to show they have been there. (See Table 1.)

	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>• Reassurance for participants – a known location where they know they will see you.</li> <li>• Develops group's sense of responsibility – time estimation, sticking to plan etc.</li> <li>• It gives the group freedom and responsibility to make their own decisions.</li> <li>• Provides structure for the group.</li> <li>• Gives a sense of achievement when they are at the correct place at the correct time.</li> </ul>	<ul style="list-style-type: none"> <li>• Decisions need to be made if supervisor not at arranged point.</li> <li>• Groups becoming 'needy' about having contact with supervisor.</li> <li>• Lack of independence.</li> <li>• Robust accuracy of Route Card and time management does not allow for the unidentified problems on route.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>• Ensure that group manages a 'risky' situation safely – busy road crossing, band of steep ground.</li> <li>• Useful at 'decision' points.</li> <li>• Face to face dialog with group, can assess energy levels and morale etc.</li> <li>• Can hot-review the last navigation leg and front load information/assist with details of next leg.</li> <li>• Able to see multiple groups if they are going through the same point.</li> <li>• Allows, for building and checking of skills by both participants and trainers.</li> <li>• 'Leapfrog' staff at the different checkpoints.</li> </ul>	<ul style="list-style-type: none"> <li>• Could be stuck in a fixed position for extended period of time.</li> <li>• Requires patience.</li> <li>• Needs to be carefully selected to ensure it can't be missed.</li> <li>• A slow group, may mean that you miss a check point with another group.</li> <li>• If a group miss the check point can be difficult to reestablish where they are.</li> <li>• Group need to be briefed on what to do if you are not there.</li> <li>• Reduced ability to make dynamic risk assessment.</li> </ul>

Table 1.

## THE 'RANDOM RENDEZVOUS'

A group is met at random points along the route, at a time and place that is not known to the group.

An alternative which can reduce the frequency and rigidity of the check pointing system is to plan a 'corridor' within which the group should be and aim to meet them somewhere within that length of their route. By estimating the fastest and slowest speeds at which the group is likely to move, the section of the journey within which they should be can be predicted, and the supervisor can be at the 'head' of that section (where they would be if they were moving very fast) and move towards the 'tail' to meet the group. Good knowledge of the group and their capabilities obviously allows greater precision to be applied to this prediction.

It should also be noted that the later in any day that this technique is applied, the greater distance the supervisor is likely to have to cover (e.g. If the group might be moving at between 3 or 5k in an hour then a rendezvous six hours after the start time will have a theoretical 12k 'corridor' for the supervisor to move down)! Major



Photo: Lupine Adventure Co-operative.

disadvantages include a similar possibility of missing the group (compared to the fixed checkpoint system) and the possible isolation of the supervisor(s) a long way from transport or communications. (See Table 2.)

	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>• A sense of self-reliance as they won't know if or when they will be monitored.</li> <li>• Independence.</li> </ul>	<ul style="list-style-type: none"> <li>• Not sure when they are going to be seen next.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>• Flexibility to take conditions (weather etc.) into consideration.</li> <li>• More scope to see group in different situations.</li> <li>• Creates a more natural journey/gives ownership to the group.</li> <li>• Allows for flexibility in the remote supervision plan by not holding yourself or the group to a prearranged meeting point.</li> <li>• Get a better overview of what's going on.</li> <li>• Two-way verbal communication.</li> </ul>	<ul style="list-style-type: none"> <li>• Higher chance of 'missing' the group.</li> <li>• It relies on accurate estimate of group pace and navigation. If it fails, you then have additional uncertainty.</li> <li>• Personally needs to be competent to find group.</li> <li>• Group may panic if they don't see supervisor.</li> <li>• Hard to judge where the group might be if you've not had contact for a while.</li> <li>• Reliant on the group being where they are meant to be at any given time.</li> <li>• Supervisor will need to be able to be out on the ground.</li> </ul>

Table 2.

## POST BOXES/DEAD LETTER DROPS

The group leave a letter/note/marker at an agreed location for the supervisor to pick up. This will ensure the supervisor knows if the group has passed. The letter may have details such as departure time, group condition/morale etc. or could be as simple as a coloured drawing pin attached to a stifle. Whichever type of dead letter drop used it should be left visible and secure.

Whilst less effective than actually talking to participants, the notes also provide an opportunity to assess the group's morale and well-being. This information must be collected from its location, however, and therefore relies on a competent person to retrieve it and, possibly, relay it to the person in overall charge. This removal is not simply to gain information about the group. Regularly used route 'hot spots' can acquire 40 or 50 such messages!

Although techniques are increasingly subtle (coloured drawing pins in gate posts; painted 'lolly sticks' stuck in the ground) there is still an environmental impact that should be minimised. This method of remote supervision also relies on group members being able to leave the correct information at the correct location, and for it to be collected soon afterwards. The placing of the message should be clearly defined ('leave at the track junction' covers a multitude of possible hiding places) and thus prior knowledge of the route is very valuable and the message should be clearly identifiable.

This method should not be used as a fall-back system where messages are only collected if something goes amiss. (See Table 3.)



Photo: Malcolm Creasey.

	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>Allows the freedom of complete self-sufficiency.</li> <li>Total independence.</li> <li>They have to deal with a supervisor not being there. Perceived as less of a safety net.</li> <li>It puts trust in the group and allows them ownership of the supervision process.</li> <li>It is a good way of tracking a small number of groups that are experienced and who would benefit from less supervisor interaction.</li> </ul>	<ul style="list-style-type: none"> <li>May struggle to find the exact point.</li> <li>Participant navigation training needs to be enhanced.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>Allows groups almost total autonomy.</li> <li>Let's you know that a group has passed a specific point.</li> <li>Works well with very organised and disciplined groups.</li> </ul>	<ul style="list-style-type: none"> <li>Time to set up and take down.</li> <li>Risk of interference from others.</li> <li>Limited communication with group.</li> <li>Supervisor needs to maintain and check each drop regularly to be effective.</li> <li>Environmentally unsound if not collected back in.</li> <li>This model is essentially slow motion orienteering.</li> <li>Seems to be prone to going wrong!</li> <li>Important that drop cards do NOT identify the group/individuals.</li> </ul>

Table 3.

## SHADOWING

Long-range observation can tell the experienced observer much about the decision-making and group dynamics taking place. The use of this method depends upon good visibility and careful route planning. It may well be possible for a party undertaking a valley-based route to be shadowed from a parallel ridge but the overall visibility needs to be carefully evaluated since extensive blind spots can exist that are not immediately apparent from the map. This method also ties up supervisory staff and they must either be able to operate alone on the hill or have somebody to accompany them. The bonus however is the relative proximity of supervisor(s) and group throughout stages of the journey. If staff are operating independently on the hill it is always advisable that they also have some means of contacting base or the overall supervisor should they become

incapacitated. Shadowing can be more appropriate with less able groups and/or where the supervisor is concerned about particular sections of terrain. Sometimes a particular hazard may be overseen by supervisors who accompany individual groups past the location.

A useful tool for this method is a good pair of binoculars. Needless to say the heavier and more expensive kind is better in low light than the lighter, cheaper models. Binoculars can allow the supervisor to be well away from the group in a position where they cannot see you but you can see them. Care must, however, be exercised, so that supervisors do not render themselves open to any form of criticism from groups who may feel they are being spied upon, for instance during a toilet stop. For this reason openness about the use of this method is important.



Photo: Lupine Adventure Co-operative.

This method of supervision removes some of the variables and allows a positive sighting at a definite location. It may also allow the supervisor to move in relatively quickly to intervene should it be necessary or even to intervene by phone. As noted earlier, however, this intervention may not be instant and often involves considerable travel time on the part of the staff member.

In terrain (or weather) where observation from a distance is not an option then shadowing can be undertaken by simply following the group along their route; sometimes catching up to allow them to come into sight before the supervisor falls back again. It has to be noted that this type of shadowing may make it easier for a 'stuck' group to get help. They just wait. There is, however, a reduction in the degree of 'remoteness' felt by a group that knows it is being followed.

Another version of this technique is for a supervisor to travel the route ahead of the group. They can wait after decision points and move on when they are happy that the group is moving in the right direction after them. This means that the supervisor must be able to move faster than the group but has an additional advantage in that the planned route is being checked for feasibility or unforeseen problems.

There are three shadowing options:

**Option 1 – Same route, same direction**

Staying close to the group, but giving them the space to make decisions and have discussions without immediate referral to authority. Again this can be easily varied to give shorter or longer periods of independent group decision making time. (See Table 4.)

	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>• Allows initial attempts at self-sufficiency.</li> <li>• 'Safety net' of supervisor on hand.</li> <li>• Builds confidence.</li> <li>• It is ideal when pushing the boundaries for younger, or less experienced people. It gives them some freedom, and allows them to make mistakes that can be rectified whenever the supervisor feels like it.</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of sense of independence.</li> <li>• Rely on the supervisor.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>• Can see how the group operates</li> <li>• Easy to check on the group.</li> <li>• Allows options for combined instruction, coaching and then letting the group get on with the task.</li> <li>• Can vary the distance between you and the group to give them decision making time.</li> <li>• Simple to manage</li> <li>• High supervision capability, easy to step in if required.</li> <li>• Useful in difficult to navigate terrain.</li> </ul>	<ul style="list-style-type: none"> <li>• Very likely to keep bumping into the group, particularly at decision points.</li> <li>• Lacks group self-sufficiency.</li> <li>• Risk of over-supervising.</li> <li>• Can be slow.</li> <li>• Potential transport issues.</li> <li>• Only works well with one group.</li> <li>• Group becomes aware of hazards before you do.</li> </ul>

Table 4.



Photo: Lupine Adventure Co-operative.

### Option 2 – Same route, different direction

Travelling along a group's route, but in the opposite direction, allows for 'Random Rendezvous'. (See Table 5.)

	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>• Increased self-sufficiency.</li> <li>• Increased independence.</li> <li>• Decision making.</li> <li>• Limited supervisor interaction.</li> <li>• Don't feel like they are being followed.</li> </ul>	<ul style="list-style-type: none"> <li>• Little support.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>• Good for finding slow moving groups.</li> <li>• Allows one person to see multiple groups if on the same/similar routes.</li> <li>• Enables supervisor to check part of the route before group gets there, either if route is unfamiliar or conditions have changed. Check road and river crossings, steep terrain, difficult navigation points.</li> <li>• Still allows feeling of independence for the group.</li> <li>• Useful at the end of the day/journey to give some encouragement.</li> <li>• Easier on well-defined rights of way.</li> </ul>	<ul style="list-style-type: none"> <li>• Distance from group.</li> <li>• May only see them once, need to combine with other methods, if needing to see them more frequently.</li> <li>• Only works if group are on their planned route.</li> <li>• Potential transport issues.</li> <li>• Time consuming.</li> <li>• Can often miss group, if there are multiple options – woodland, open hill side in poor visibility.</li> </ul>

Table 5.

### Option 3 – Parallel route/vantage point

From an appropriate vantage point, a group can be observed without being aware of it. (See Table 6.)

	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>• Increased self-sufficiency.</li> <li>• Increased independence – may not see supervisor all day.</li> <li>• Decision making.</li> <li>• Limited supervisor interaction.</li> <li>• Don't feel like they are being followed.</li> <li>• Greater group autonomy.</li> <li>• Freedom and self-determination.</li> </ul>	<ul style="list-style-type: none"> <li>• The feeling of being watched.</li> <li>• Concerns over when and how they are being observed – toilet stops etc.</li> <li>• Remoteness.</li> <li>• Feeling of lack of support.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>• Able to observe the group without interfering with their self-sufficiency.</li> <li>• Track progress easily on open moorland or mountain side.</li> <li>• Watch the interaction of group members without them being aware of it.</li> <li>• Monitor group over an extended period of time.</li> <li>• Can work with multiple groups on the ground.</li> <li>• Can't intervene.</li> <li>• Allows you to observe group naturally.</li> </ul>	<ul style="list-style-type: none"> <li>• Limited/no use in certain types of terrain/ woodland.</li> <li>• Limited/no use in poor visibility.</li> <li>• Needs good line of sight.</li> <li>• Can't intervene.</li> <li>• Additional planning required to ensure that the correct vantage point is found.</li> <li>• Difficult to judge morale illness/sunburn.</li> <li>• Can't check if they have eaten/soaking wet/having a horrible time.</li> <li>• If you do see a problem or they are headed the wrong way, you need to get to them – not always easy.</li> <li>• Increased distance to walk and often on more 'interesting' ground.</li> </ul>

Table 6.

## STUDENTS CHECK IN WITH MOBILE PHONES

Groups use a phone to either ring or text the supervisor when they are at a particular location. Text messages are preferable as it gives a record of the conversation and the time can be checked, not to mention it uses less battery power and is more likely to be sent/received in areas with poor reception.

Mobile phones can be very useful but they can also go wrong, usually at the critical moment. It is important to ensure that not too much trust is put in them. One is missing a trick if the advantages are ignored, they can save time and effort, but few are robust enough for the extremes of UK weather! The use of mobile phones for either direct voice contact or text messaging may also raise ethical arguments. Having said this, the reality is that most people have one, are proficient in its use and to some extent aware of its shortcomings (battery life, no signal etc.). Trying to prise them out of the hands of people today is difficult enough in towns and cities, let alone if they are going to be out on a three-day unaccompanied expedition which they perceive to be in the middle of nowhere! It might also be considered to be unsafe practice given their undoubted advantages in some cases of emergency.

The major practical issue regarding their use as a remote supervision tool is the network coverage in upland areas. If no message is received at the predetermined time there can be problems of deciding on the appropriate course of action. This leaves many questions unanswered and decisions will have to be taken within a short space of time. How long do you leave it before you go out and look for them? One missed check in or two? How often do you expect them to call in? Has the battery run down? (at least in this case they are unlikely to discard it!). Has the phone got wet so that some angry parent is going to give you the bill for replacing it? In reality it is unlikely that a group will have only one phone unless the supervisor has placed that restriction upon them.

The balancing of the wilderness experience with the ready availability of communications should be considered in the planning stage. Protocols for whom to contact, how and when can be defined and shared between group, observing staff, supervisor and people back at base if appropriate.

This kind of response planning should be specific to the journey in question since dead spots can often be

predicted. Consequently, an informed guess as to the probable location of the group can enable the supervisor to anticipate any navigational decision points or terrain hazards that the group may encounter even without the planned communication.

Basic mobile phones, like radios, also rely on the group knowing exactly where they are and not simply reporting on where they think they are. However, recent developments in technology mean that there are mobile phones (and radios) available that have a built in GPS. Systems exist whereby this information can be obtained remotely (eg. SARLOCK used by Mountain Rescue teams). This method does rely on good mobile coverage, a battery that can be relied upon and indeed a robust handset. It is also worth remembering that one of the biggest increases in the cause of mountain rescue callouts in recent years has been that of people getting lost and then asking that someone goes out to get them because they don't know where they are! A method of discouraging indiscriminate use of radios or mobile phones is to seal them in plastic bags at the start to be checked later along with the rest of the emergency equipment (this can be easily cheated apparently, and comes with its own ethical and operational questions, but it makes a point!).

	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>• Responsibility.</li> <li>• Greater feeling of independence and empowerment.</li> <li>• Feeling of remoteness.</li> <li>• Independence.</li> <li>• Sense of security</li> <li>• Teaches that the phone is a tool, not just a toy or fashion accessory.</li> </ul>	<ul style="list-style-type: none"> <li>• Sense of security.</li> <li>• Battery Life.</li> <li>• Lack of signal.</li> <li>• Distracts from the experience of the outdoors.</li> <li>• Over reliance causes a distraction and panic if messages aren't being returned.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>• Two way communication, particularly useful if group or supervisor delayed.</li> <li>• Can confirm that group have reached a remote/hard for supervisor to access check point.</li> <li>• Flexibility.</li> <li>• The group are familiar with their own phones.</li> <li>• Monitor a number of groups.</li> </ul>	<ul style="list-style-type: none"> <li>• Battery life.</li> <li>• Lack of signal/terrain constraints.</li> <li>• Lack of credit.</li> <li>• Potential safeguarding issues, if using personal phones.</li> <li>• Are the group where they think they are/ say they are?</li> <li>• When possession of mobile phones is considered detrimental to other aims of the activity.</li> <li>• Over reliance causes a distraction and panic if messages aren't being returned.</li> <li>• Text messaging unreliable – can take hours for message to get through.</li> </ul>

Table 7.





## MOBILE PHONE BASED TRACKING

This method may be combined with GPS tracking detailed below (See Table 8).

### GPS

Although GPS receivers have reduced in price over the last few years they are still expensive. It could, indeed, be argued that their use can inhibit the development of more valuable 'traditional' navigation skills. It is possible to download the proposed route from a computer into the device so that the GPS could be used in an emergency but this may require considerable extra training and practice.

It has started to become common for participants to use certain apps like 'OS Locate' to be able to help with the relocation of geographically challenged groups. If you are already having a phone conversation with a 'lost' group it does mean that they have a phone signal and can use these apps to give you a six figure grid reference of their location. It could mean the end of those frustrating discussions when the group are trying (unsuccessfully) to describe their surroundings to you.

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Malcolm Creasey.  
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	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>Freedom.</li> <li>Self-sufficiency.</li> <li>Independent.</li> <li>Unobtrusive.</li> </ul>	<ul style="list-style-type: none"> <li>Battery life.</li> <li>Lack of direct support.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>Real time updates.</li> <li>Able to pin point students on demand, subject to signal.</li> <li>Able to monitor multiple group.</li> </ul>	<ul style="list-style-type: none"> <li>Battery life.</li> <li>Lack of signal/terrain constraints.</li> <li>Expense.</li> <li>Web/internet access maybe required to monitor.</li> <li>Usually the group have to activate the tracking link.</li> <li>Reliance on technology. Equipment failure.</li> <li>Additional supervisor training/ competency required.</li> <li>Inability to intervene.</li> <li>Does not allow interaction with group, cannot see if they are together, morale issues, injuries.</li> <li>Not necessarily supervised!</li> </ul>

Table 8.

As a general principle it is probably safe to say that nothing can replace basic competence and experience; technology will only assist. If it's got a battery there is the potential for it to let you down, especially in cold, wet conditions when you are more likely to need it!

Both mobile phones and GPS systems are developing rapidly and whilst we can only speculate what will happen within the next few years, it is fair to say that both will get more efficient, lighter and hopefully cheaper. Certainly the advent of digital mapping has assisted in the planning/ checking of proposed routes; however all the technology in the world is no substitute for experience and appropriate training for participants, supervisors and assisting staff.

### REAL TIME GPS TRACKING SYSTEMS

A small box that sits in the top of a group rucksack transmits a periodic signal by mobile or satellite communications (depending on model) that can then be picked up by a supervisor and used to update location either manually or using mapping software. (See Table 9.)

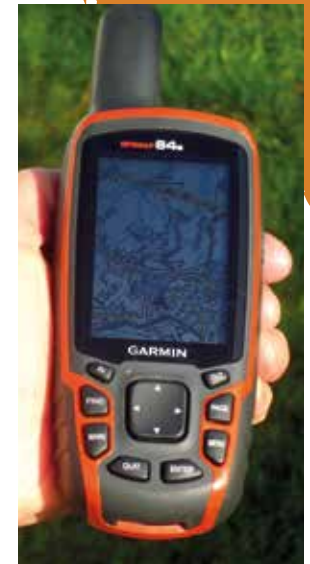


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Malcolm Creasey.  
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	Advantages	Disadvantages
<b>Learner</b>	<ul style="list-style-type: none"> <li>Freedom.</li> <li>Self-sufficiency.</li> <li>Independence.</li> <li>Unobtrusive.</li> <li>Can review navigation mistakes/ decision making.</li> </ul>	<ul style="list-style-type: none"> <li>Feeling of isolation.</li> </ul>
<b>Supervisor</b>	<ul style="list-style-type: none"> <li>Excellent tracking in real time.</li> <li>Excellent debriefing aid, when using the group's track.</li> <li>Completely remote.</li> <li>Able to monitor multiple groups.</li> <li>Great in out of the way places where distance and access are difficult.</li> </ul>	<ul style="list-style-type: none"> <li>Inability to intervene.</li> <li>Battery life.</li> <li>Lack of signal/ terrain constraints.</li> <li>Expense.</li> <li>Web/internet access maybe required to monitor. Little use for a supervisor on the ground.</li> <li>Reliance on technology – possible equipment failure.</li> <li>Does not allow interaction with group- cannot see if they are together, morale issues, injuries.</li> <li>Additional supervisor training/ competency required.</li> </ul>

Table 9.

## WHEN IT DOESN'T GO TO PLAN

**“No plan survives first  
contact with the enemy.”**  
– Moltke the Elder, 1800-1891

When your plan meets the real world, particularly when it involves children, novices or individuals that you don't know very well or all three, a supervisor needs to adapt to whatever the circumstances dictate. Therefore a set of robust procedures need to be in place for anything that you can foresee being an issue, eg. overdue or lost group/supervisor and their subsequent relocation, injury or illness. The situation needs to be dealt with in a timely manner.

Anything that happens that you haven't been able to foresee needs to be dealt with promptly, recorded for future planning and it then needs to form part of your next set of procedures.

*Photo: Lupine Adventure Co-operative.*

# REMOTE SUPERVISION CHECKLIST

Remotely supervised activities provide exceptional learning opportunities for their participants. However, the management of such activities is not without its challenges and pit falls. The check list below provides a simple series of questions that will guide the process beyond the 'in field' activity and enable you to provide evidence of planning and preparation.

- ✓ **Are the supervising staff qualified and/or competent to run the activity?**
  - Are these qualifications current and up to date?
  - Do you have evidence of this?
- ✓ **Has additional training for staff been provided where necessary?**
  - Has this been recorded?
- ✓ **Has appropriate and adequate supervision been provided to participants?**
  - Has the nature and level of supervision been discussed and agreed with the group and staff (shadowed, check point, phone in, SPOT device)?
- ✓ **Have all reasonable steps been taken to ensure the safety of the activity itself, the environment and equipment?**
  - Weather forecast? Plan B-C? Equipment checks by staff and students?
- ✓ **Have the group been adequately advised on safety matters?**
  - How and when to seek help?
- ✓ **Are the group prepared for the activity, including attention to footwear, clothing and equipment and carrying full maps (i.e. not just a printed sheet of their routes)?**
  - Has this been checked?
  - Do they know how to use it?
  - Is the evidence documented – if so – where?
- ✓ **Is the activity appropriate for the group, and the manner in which it was carried out consistent with regular and approved practice in other similar situations?**
  - Has appropriate consent (in the case of under 18s) been obtained?
  - Has a comprehensive risk assessment been carried out, documented and communicated to all concerned?
  - Are the staff aware of any relevant special needs and have they taken steps to cater for these requirements?
  - Are all procedures carried out following organisational guidelines, including necessary approvals?
  - Are the staff and group aware of, and familiar with emergency procedures?
- ✓ **Finally, have any incidents been efficiently handled, without undue delay, following organisational emergency procedures?**

*Photo: Pete McCourt of Ocean Rock Adventure.*

## CASE STUDIES

The purpose of this collection of case studies is for an individual to consider 'What would I do in this situation?' as opposed to being held up as the ideal models.

### CASE STUDY 1

**Tom Laws, Ysgol John Bright.  
Silver DofE Qualifying expedition.  
June 2014.**

4 Groups of 6 students, all 16-17yrs.

#### Day One

The first day was a shorter day walking from Betws-y-Coed to Garth farm. The groups followed valley side routes that funnel them towards the camp. The supervisor and assessor both made contact with all groups at least once to check that all are settling into the process. Several groups have swapped members since practice so this was worthwhile. Staff met the groups using either random rendezvous or by walking sections of the route in reverse. Garth Farm is a big camp site, so the staff camped on the far side of the camp site, over a rise from the students, and the students didn't see that the staff were on the same camp site.

#### Day Two

The weather was exceptional – blue skies, light breezes and a stable forecast. One member of staff has a prearranged checkpoint at the A5 road crossing near Tryfan. This is because the road was very busy with tourist traffic. It also allowed all groups to be checked onto the mountain, and ensure that they are entering the right valley as 300m further up is a similar path leading to Cwm Llugwy and steep terrain.

Meanwhile several members of staff (including the assessor) climbed to the top of the Creigiau from Llyn Crafnant.

*Photo: Lupine Adventure Co-operative.*

From the Southern red cross it was possible to see the groups moving from approximately SH705608 all the way along the side of Llyn Cowlyd, and by moving North East the groups could also be seen crossing the saddle and entering the woods, where the path of least resistance leads to their camp site. Staff were camped 600m down the road from the students and no contact was made at night. Students knew where the staff camp was. As the weather was excellent, visibility was not an issue and this method worked well. In poor weather we have had random rendezvous at the Southern end of Llyn Cowlyd and the Dam to ensure groups do not massively overshoot, and to monitor which valley they are in.

#### Day Three

On Day three the students walked back over to Llyn Cowlyd and over again into Cwm Eigiau, before completing their route near Llanbedr y Cenin. Again random rendezvous was used to meet all four groups between Llyn Cowlyd dam and Cwm Eigiau. All groups went at least 24 hours without direct contact with staff. The final leg from Cwm Eigiau staff would join groups for short stretches to discuss how the trip had gone.

## CASE STUDY 2

### Outdoor Centre. Multi-day walking journey in the Highlands.

The information set out below is on the basis that the group will not be shadowed and that substantial parts of the journey will be completely unaccompanied. The use of SPOT tracking (or similar) devices are not used.

#### Prerequisites before the group can be considered capable of the 'unaccompanied' journey:

- The group has reached a stage of maturity and cohesiveness that there is high confidence in their ability to make good decisions and operate in a cohesive and supportive manner.
- The group has been through 'action in the event of an emergency' training and responded effectively to set scenarios.
- The weather and conditions are appropriate for the planned journey.
- All group members are fit and healthy.

#### Safety and Risk Assessment:

- The group is equipped with full camping gear, first aid kit and mobile phone.
- They have food and fuel for the full journey.
- It is feasible for the instructor to get to the group each day if required.
- River crossings are to be avoided or if unavoidable the instructor will either supervise or be present at such locations.
- No scrambling or sections of rocky exposed terrain will be part of the journey unless an instructor is present.

- Appropriate guidelines will be in place and practice in safe cooking procedures will have been undertaken.
- The group must understand that they must not split up unless calling for assistance in the event of an emergency.

#### The level of 'remote' supervision:

- If the plan is prepared on the basis of an unaccompanied journey there needs to be back-up provision to enable instructor intervention/presence if required.
- Contact (either direct or indirect) on each day of the journey is required. This would preferably be approximately 24 hours apart. Contact in the evening followed by contact the following morning and then the evening of the following day would be undesirable. This pattern could be considered in good weather and a very straight-forward route.
- The nature of indirect contact would preferably be done via a predetermined phone 'check in' from locations known to have good mobile reception. Alternatives of a message being left at a defined check point which is then picked up by the instructor could be considered, but runs the risk of the group missing it or failing to navigate to the correct location.
- In all cases of 'indirect' contact, plans must be put in place in the event of 'no contact'. These plans should include procedures for the group to follow as well as the instructor/operating centre.
- What about actions following a missed 'direct' contact?

## CASE STUDY 3

### Simon Verspeak – Crib Goch.

One of my favourite days of remote supervision was supporting a Gold DofE practice over Snowdon. We had spent two days training them prior to a four day expedition. They were a mixed group of six; all 16-17 years old and having previously completed Bronze and Silver expeditions.

Their chosen route started from Northern Snowdonia and finished in the Rhinogs. The first day would take them up the PYG track, up onto the summit and down the South Ridge to Nant Gwynant. The group were well prepared and equipped and the weather conditions were excellent.

Given my knowledge of the group and the terrain, I made the decision of using check points alongside shadowing them over this route. With very good local knowledge of the area I felt I could checkpoint the group at a couple of locations on the way up and follow them over the parallel route of Crib Goch/Crib y Ddysgl. This route gives an excellent vantage point over the lower route with only a few areas (the initial section from Bwlch y Moch to before the shoulder at 650m) with no view. I could then see them approach up the 'Zig zags' to Bwlch Glas and shadow to the summit.

The route down is slightly more complex so I followed much more closely to give a few route finding tips but on the whole letting them choose the route. This was a really challenging but rewarding day for the group in real mountainous terrain.

*Editor's note:  
Simon has extensive local knowledge and is a member of a local Mountain Rescue Team so I have no doubts about his ability to remotely supervise this particular group in clear weather; however it would not be considered normal practice to supervise teams on the Pyg track from Crib Goch.*

## CASE STUDY 4

### Neal Gwynne, The Glasgow Academy. Four day expedition in south/central Iceland.

The Glasgow Academy has an adventurous Outdoor Education programme led by a full-time Head of Department and supported by around six teachers who have various qualifications in trekking, climbing, skiing and kayaking. Progression is key to the success of this programme and, although all activities are optional, students are encouraged to develop their experience and skills as far as possible. It is hoped that this will lead to the students being confident and knowledgeable enough to continue pursuing these activities independently after leaving school and, ultimately, to life-long participation. This four-day expedition to south/central Iceland was the culmination of a number of years' participation in the Outdoor Education programme for the seven students involved. The age range was 16 – 18.

The route followed the well-known trail from Skogar, on the south-central coast of Iceland, due north for four days to Landmannalaugar. Most groups follow the route in the opposite, and easier, direction finishing on the coast at stunning waterfall, Skogafoss. The route frequently features on lists of the top trails in the world and for good reason. The whole route is spectacularly dramatic, but each day took the group through a different geographic feature. Day 1 saw the group ascend over 1000m to pass between two small ice caps, one of which is an active volcano; Day 2 involved a 20 km crossing of an ash desert; Day 3 crossing a plateau littered with boiling hot mud pools and plumes of sulphurous steam; Day 4 trekking amongst mountains in a kaleidoscope of colours resulting from minerals oozing out of the Earth. There are frequent river crossings that vary in depth on a daily basis, occasional snow patches depending on the season, visibility is often poor and dust storms sometimes occur. All of these hazards, of both terrain and weather, require careful consideration and this is especially so when the group are remotely supervised.

Management of the group required on-going assessment of the risks throughout each day. Camping is restricted to areas beside the six or so huts along the route, for sanitation reasons, and this provided an opportunity to discuss the next day with the team each evening. The techniques used for remote supervision on this expedition were usually a mixture of Shadowing (same route, same direction) and Shadowing (vantage point). It is important for the supervisor to encounter the hazards on this route prior to the group, for example, river crossings and snow patches. The students had received practical training in river crossings in the UK and, therefore, if the river crossing was safe and within the skill level of the group, the supervisor would carry on and leave the group to it – perhaps using a vantage point to unobtrusively watch the group to monitor horseplay and group morale. Some river crossings may require hands-on guidance from the supervisor and they could wait at the river for the group's arrival. These same techniques were used for snow patches.

The hazards associated with hot mud and sulphurous stream were discussed with the group at the first venue encountered. Thereafter, shadowing from a vantage point was used.

Weather forecasts were obtained infrequently from manned huts on the route and were used to assess the potential risk of poor visibility and storms the following day that may affect the remote supervision technique used.

This expedition was also used as a staff development opportunity. A member of staff with a Mountain Leader award shadowed the expedition leader (MIA, IML, WML) and subsequently took responsibility for remotely supervising the same expedition the following year.

## CASE STUDY 5

### The Chase School. Annual Malvern Hills walk.

It has been an annual tradition at The Chase School, since the Queen's Silver Jubilee in 1977, for the majority of the 1600 students and 150 staff to journey along a 7.5 mile walk across the Malvern Hills and the surrounding area. The walk begins at the clock tower in North Malvern, at the foot of the Malvern Hills, and finishes at the school campus on Geraldine Road, Malvern. For the duration of the walk the students are free to walk in their peer groups.

Preparing the students for the walk starts to take place several weeks in advance. Letters are sent out to parents and briefings are held in assemblies and smaller tutor groups, not to mention reminders using social media and the school internal and external websites. The students are encouraged to have their mobile phones with them and to have the school number on it. Likewise, the form tutors collect the student's numbers, which are then held centrally to be used if required.

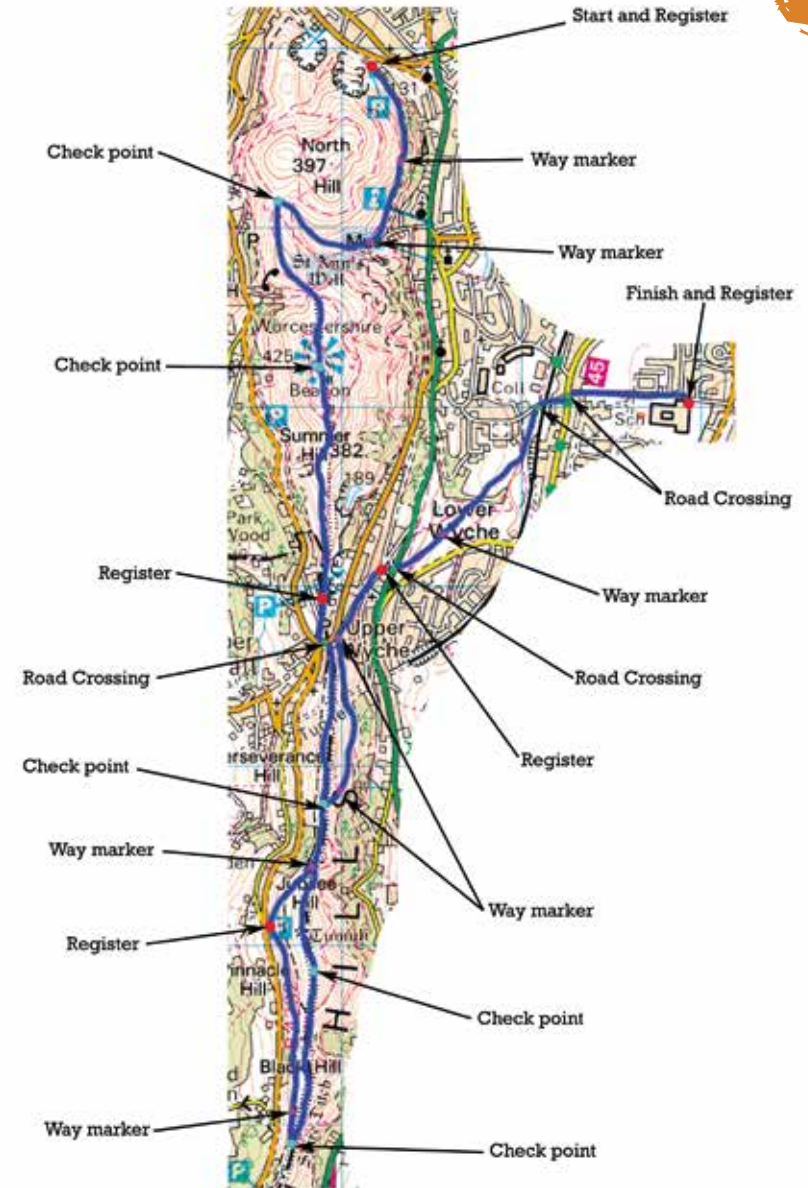
On the morning of the walk the students meet their form tutors at the Clock Tower and are registered (they are also registered again at just over the half way point and upon returning to school). Each student is given an individual card with a map of the route on one side and a series of boxes on the other. As the students' progress around the route these are signed by staff at set check points. There are other staffed check points along the route, but these are just used to direct the students, at key decision making points and road crossings.

The students are released in waves, with the students with the most experience (Year 10) of the route going

first, followed by those with the least experience (Year 7), with the remaining two year groups following behind. Sixth form students are mixed in with the rest of the school.

Other than a few key roles, the remaining members of staff are free to walk the route mixed in within the students. A small number of the staff also walk the route in reverse from three key points, enabling them to see and greet pretty much the entire school. There is a small party that walks along at the rear of the school, collecting and encouraging any stragglers. There are normally a few members of staff on mountain bikes as well as a couple in minibuses and they are given the grand title of 'roving problem solvers'. They are equipped with first aid kits and mobile phones and are responsible to the person in overall charge on the day, who uses them as and when required (i.e. when issues arise).

Once all of the students and the rear party have arrived back at school, registers are checked to ensure that all students have been accounted for. Anyone not accounted for is contacted via phone, either their own or their parents to confirm that they have finished. On average this is done for around five students per year, who have 'forgotten' to sign back in. The person coordinating this walk is out on the ground making decisions and checking up on certain check points as required. Due to the nature of the mobile phone signal, phones cannot be relied upon unless on high ground, so that is taken into consideration when the co-ordinator plans his/her travel route. The co-ordinator keeps a careful note of phone calls, messages and decisions made for future reference (mainly for planning for the following year) using a combination of a note book and mobile phone.



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## CASE STUDY 6

**Steve Holmes.**  
**Sometimes it doesn't go to plan (1).**  
**A group of six Year 10 students on the second day of Bronze practice expedition, having attended a training camp 8 months beforehand. Walking from A6 to Sheldon.**

I had last seen the group having lunch by the road at the bottom of the hill. I walked up to Sheldon with a different group, liaised with staff in Sheldon, and then walked down the hill again to intercept my group. I got to the bottom of the hill, and not having seen them decided they had taken the route through the wood which was their original route. I walked back up the hill, and not finding the group I called them. They said they had gone through the woods and were still in the woods, so I headed down through the woods to find them. I missed them again and went back up the hill.

I called the group again and they said that they had followed a path up the hill. It was cold, drizzly, misty and I was getting cold and worried about the group. I asked them if anyone had a high data allowance and instructed them to download the "Grid Reference" app, then use it and text me their location.



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They did this and I was able to instruct them to head West to a path by a fence/wall, then turn left up the hill. I ran down to meet them in the field.

**Purple** – the route I thought they were taking  
**Blue** – the route they tried to take  
**Yellow** – the diversion they took!

## CASE STUDY 7

**Sometimes it doesn't go to plan (2).**  
**Day 3 of a DofE Gold qualifier.**

It was an early start to shadow/accompany the team of six (1 Russian, 1 German, 2 Chinese, 1 American, 1 British) to Drws y Gwynt on Pen y Fan in poor visibility. I wanted to be sure that they a) found the col, and b) left the col in the right direction. I moved behind some rocks to get signal to phone in their arrival time, before returning 1 minute or so later to find the group had gone. I guessed on their route choice and caught them up after about 200 metres of worried running. Phew! I made my own way to the next checkpoint.

## EXAMPLE LATE BACK PROCEDURE

*Courtesy of Lesley Rickman of 1st Mountain Activities.*

- One leader is responsible for the late back procedure each day. If they are late back, the responsibility falls to a nominated person.
- Departure and expected arrival times are clearly defined and known to the whole leadership group.
- All staff and teams have emergency contact information with relevant mobile and land line numbers.
- A party will be deemed late back if past the agreed time for that day, taking into consideration their progress throughout the day, weather and other influencing factors.

### **If a party is late...**

- All staff **MUST** report directly to the nominated leader.
- An 'away bag', containing full medical/consent details/first aid kit/spare clothing etc. readily available.
- Ensure the safety of the rest of all teams and staff.
- Emergency 'away bag' containing First Aid kit, spare clothing/kit medical/consent details etc.
- Nominated staff takes responsibility for the remaining groups.
- Specific phone numbers are designated.
- Staff are allocated to:
  - retrace to the last known location of the team.
  - proceed to the expected area on the route.
- Other locating techniques implemented.
- If necessary contact emergency services and inform of a 'missing group'.
- Inform home contact that there is a 'missing group'.
- Record ALL procedures and actions including timings etc.
- Other participants AND staff advised NOT to contact home.
- In the event of a serious incident full 'crisis management' procedures commence.
- Individuals should never call their parents or carers without consultation.



# APPENDIX 1: MONITORING CARD

EXPEDITION MONITORING CARD											DAY			DATE
											ONE			18 08 15
TEAM	Start	Trig point			Pull 4 Cig			Clyntawe campsite			Comments			
		ETA	Morale	DEP	ETA	Morale	DEP	ETA	Morale	DEP				
Blue Wonder	08.30	—	09.00	12.00	✓ Excellent	12.30	15.00	😊	15.20	17.30	😊	Always together and on time schedule.		
TNEES	09.00	—	09.30	12.30	Excellent late	13.30	15.30	😊 good	16.00	18.00	😊 good	Always together - nav errors made them late to Trig		

Monitoring card used to record the timings, location and morale of multiple remotely supervised groups. Courtesy of Lesley Rickman of 1st Mountain Activities.

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