



The Polesworth School
ENSURING EXCELLENCE

Educational Visits Policy

Member of leadership team with lead responsibility for oversight and update of policy	GTN
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1 General

School visits play an important role in the education and well-being of our students through extending classroom work and experiences and offering real opportunities for curriculum enhancement and personal development. We encourage our staff to lead educational visits which particularly support the curriculum but also visits which provide cultural capital and enrichment. In doing this, a balance must be achieved between the desirability of visits and the impact on lesson time to students, teachers and the school. Our aim is to balance students' academic progress and their personal and social development.

A key purpose of this document is to link the requirements of The Polesworth School with National Guidance. The school has a Service Level Agreement with Juniper Education (trading as 'EES for Schools') which covers training, advice and guidance. We use the Evolve system for planning and approving visits which all trip leaders and staff can access. 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.

The school adopts the Outdoor Education Advisers' Panel 'National Guidance' (NG): www.oeapng.info (NG references in this document hyperlink to specific sections of NG.)

2 Commitments & Responsibilities

The Polesworth School Commitment:

- To comply with the relevant legislation and Health and Safety Executive (HSE) guidance for school trips and outdoor learning activities
- To comply with and adopt current National Guidance for outdoor education
- To comply with relevant policies such as the Health and Safety Policy etc
- To have competent, responsible persons as detailed within this policy
- To ensure our risk assessment / management process is sensible, proportionate and focuses on the real risks, as directed by the HSE
- To comply with Foreign Office advice regarding any overseas visits and DFE advice regarding residential visits as necessary

All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place. Overall responsibility for health and safety rests with the Head Teacher.

Refer to NG: [Checklists](#)

3 Role of the Educational Visits Coordinator (EVC)

To help fulfil its health and safety obligations for visits, schools are required to appoint an Educational Visits Coordinator (EVC) who will support the Head Teacher in ensuring that competent staff are assigned to lead and plan visits. The EVC has attended initial EVC training and subsequent update training will be undertaken every 3 years.

Supported by the Operations Manager, the EVC ensures that a policy is in place for educational and off-site visits which is readily available to staff.

Refer to NG: [Educational Visits Coordinator](#)

Staff Cover within school

At The Polesworth School, there is a 'cover ceiling' set for the amount of staff cover created in any given period of the school day (currently 5 covered lessons per period). When the number of lessons which require cover in a given period reaches a certain level, then permission will be denied for any activity which would create further cover requirements. This policy will be subject to that decision.

Prior to receiving authorisation from the EVC and Head Teacher for a visit to take place, the organiser must consult the school calendar and cover manager in order that the cover ceilings for any date are not breached.

4 Approval of Visits

In approving visits, the Head Teacher and EVC ensure that the visit leader has been appropriately inducted/trained and/or is competent to lead the visit, see Section 5.

'Standard' visits and activities: Where a 'local learning area' has been designated (see NG: [Foundations](#)) and activities are a planned part of the curriculum during the normal day, then the visit leader should sign out before departure leaving relevant information with the Attendance office. Such activities are addressed in the school policy with a generic management plan in place. Visit leaders record the event on EVOLVE. Final approval for 'Standard' activities rests with the Head Teacher.

'Enhanced' visits and activities: All other activities will require additional planning/management, and should be entered on EVOLVE for approval by the EVC and Head Teacher.

Where school staff lead 'Adventurous Activity - Notification to EVOLVE will be sought to evidence qualified staff. See appendix 2 section 7

5 Competency to Lead

The competence of the visit leader is a key factor in the safety of participants which the EVC and/or Head Teacher must consider. Some areas of consideration:

- a) Prior experience in leading, sound decision-making, evidence from past visits, relevant skills, qualifications
- b) Competency in planning and managing visits
- c) The leader's reasons for undertaking the visit
- d) Ability to manage the pastoral welfare of participants
- e) The leader's awareness of all relevant guidelines and ability to act on these

6 Outcomes and Evaluation

Work that takes place outside the classroom can provide a very powerful means of developing learning, raising progress and attainment as well as real opportunities for personal development and acquisition of cultural capital.

Up to four 'intended' outcomes may be recorded on EVOLVE during the planning process for subsequent evaluation.

Refer to NG: [Evaluation](#)

[High Quality Outdoor Learning](#) and [A Guide to High Quality Outdoor Learning and Residential Experiences](#) can be used as tools by visit leaders in both identifying outcomes and in the evaluation of the learning.

7 Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. We are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage and The Polesworth School actively supports this.

However, the Equality Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that any adjustments made should not impinge unduly on the planned purpose of the activity.

Refer to NG: [Inclusion](#)

8 Planning and Risk Assessment

EVOLVE provides a means of recording planning and enables the EVC and Head Teacher to contribute to, support and monitor the activity.

The extent of planning required is related to the complexity of the visit, see NG: [Risk Management - an overview](#)

- 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 and outcomes of the activity. See [Managing Risk in Policy Provision](#)
- Many aspects of planning may already be in place in the form of existing policies/assessments. See NG: [Risk Management - What to record and how](#)
- The visit leader must consider all potential risks in the planning stage and discuss concerns with the EVC, pastoral staff and SLT as necessary. Planning should focus on issues that are pertinent to the specific event, the needs of the group (including special and medical needs) and the experience and competency of the staff team.
- Risk assessments must be attached to the full Evolve form when the visit request is submitted. These Risk assessments can be amended as necessary before the visit takes place in the light of changes to the visit. For residential and overseas visits, a detailed risk assessment must be attached a minimum of 10 weeks in advance of the trip so this can be quality assured by the EVC and Evolve Adviser.
- Risk assessments and visit plans must be shared with all staff involved in the visit.
- During the visit, the Visit leader must respond to changes in situations to safeguard the well-being of students and staff (Dynamic Risk Assessment)

- Planning that includes adventurous activity commonly involves delivery by an external provider (see appendix 2, section 3) and the provider will have responsibility for managing the technical aspects of the activity. As such, the provider's risk assessments should be available and can be uploaded to EVOLVE. School staff are responsible for the pastoral supervision of the activity.
- Alternative arrangements (Plan B) should be included within the planning process where appropriate, for example, where weather conditions or water levels might be critical, or where an overcrowded venue might necessitate an alternative option.

It is good practice to involve participants in the planning and organisation of visit so they can make more informed decisions, become more 'risk aware' and have greater ownership of the event.

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

Refer to NG: [Responsibilities of the Visit Leader](#)

9 Safety during the Visit

- Prior to the visit, staff must ensure that all participants understand what is expected of them including any 'rules' in place which should be emphasised as appropriate during the visit. During the visit, monitoring must be ongoing to ensure enjoyment, safety and learning.
- It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (eg Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc (Dynamic risk assessment).
- 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 NG: [Responsibilities of the Visit Leader](#)

10 Parent / Carer Consent

Schools:

- Written consent from parents/carers is not required for students to take part in the majority of off-site activities organised by a secondary school as most of these activities take place during school hours. However, as good practice and courtesy, we aim to inform parents/carers of any visits and of any required safety measures.
- Written consent must be requested for activities that need a higher level of risk management or those that take place outside school hours. Parents/carers must be informed of these activities in advance, and given the opportunity to withdraw their child from a particular visit or activity. The school must have a robust means of ensuring that changes to parent / carer contact details and child medical details are up-to-date.
- E-consent, via services such as EVOLVE+, ParentPay, My Child etc, is an acceptable alternative to paper-based consent forms.

For information about transportation of students in private vehicles please refer to Section 14. Specific parental consent is required for this, see form in appendix 3.

All: Refer to NG: [Parental Consent](#)

11 Staffing and Supervision

On all visits there must be an 'effective level of supervision' that has been approved by the EVC and Head Teacher, and is in accordance with any Governing Body policy. The agreed staffing numbers on visits will be guided by:

- The type, level, and duration of activity.
- The nature / 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, if applicable.
- The contingency, or 'Plan B' options.

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

Particular consideration is given to any implications that may arise if staff are accompanied by family members (or partners) on visits.

Refer to NG: [Group management and supervision](#)

Vetting and Disclosure and Barring (DBS) Checks

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

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

Refer to NG: [Vetting and DBS Checks](#)

Direct, Indirect and Remote Supervision

Young people must be supervised throughout any visits, even though they may be unaccompanied at times.

Direct supervision: a member of staff is with a young person / group.

Indirect supervision: young people are unaccompanied by a member of staff, but there is a member of staff in the vicinity, for example, in a museum or shopping centre, or 'down-time' at an activity centre.

Remote supervision: young people are unaccompanied by a member of staff, and the supervising member of staff is not necessarily in the immediate vicinity, for example, as might occur during D of E expeditions, or a 6th Form unaccompanied visit to a university open day.

Both indirect and remotely supervised activities can bring valuable educational benefits, and the progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including learning to manage risk, self-sufficiency, interaction with the public, social skills, communication, decision-making, etc.

The decision to allow indirect or remote supervision should be based on professional judgement taking into account such factors as:

- prior knowledge of the individuals (including their maturity and levels of responsibility);
- venue and conditions;
- the activity;
- preparatory training;
- the competence of supervising staff;
- the emergency systems in place.

When recording a **remotely** supervised visit on EVOLVE, there must still be a named visit leader. This will be the member of staff that has made a professional judgement regarding the level of responsibility and maturity of the participants and decided that, in their opinion, it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. A 'Note' should be added to EVOLVE specifying that remote supervision applies.

Refer to NG: [Ratios and Effective Supervision](#)
[Group Management and Supervision](#)
[Vetting and DBS Checks](#)

12 First Aid

For all visits there should be a responsible adult with a good working knowledge of first aid (but not necessarily a qualified first aider) appropriate to the environment (eg. urban, remote, water, etc). There may be a qualified first aider at a venue.

General 'life experience', or a 3 hour non-assessed 'Basic Skills' course is suitable for routine urban visits. However, the nature of the visit may indicate that a higher-level qualification is appropriate. The EVC (or visit leader) will make a professional judgement regarding the level of first aid required. One day First aid courses are provided to key staff who regularly lead trips to support their competency of basic first aid and ability to evaluate accidents. In the event of an accident/injury requiring urgent medical care, the emergency services will be called whether at home or abroad. Mobile phones are provided on all visits.

A first aid kit appropriate to the visit should be carried. Refer to NG: [First Aid](#)

13 Insurance

Insurance for off-site visits

Insurance cover for off-site visits is provided through the school's cover from RPA (Risk Protection Arrangement). Any overseas visits are insured separately.

For international travel within the European Union and Switzerland, all participants must currently hold a valid GHIC (Global Health Insurance Card).

Use of privately owned or hired vehicles

Teachers, employees and volunteers who use their own vehicles, must ensure that their Motor Vehicle Insurance Policies specifically permit such use. Should an employee or volunteer fail to make such an arrangement and an accident occurs resulting in a claim, their insurers may declare the policy void. In addition, the teacher or volunteer may be prosecuted for failing to affect adequate cover. Similar care must be taken when hiring vehicles to ensure that adequate insurance is arranged. The school subscribes to "Occasional Business Use" insurance cover, but this does not cover planned educational visits as a matter of course.

Alternative travel insurance arrangements

The Polesworth School is insured for visits through Risk Protection Arrangement (RPA) and does not use travel Insurance offered by tour operators and external providers.

The **Duke of Edinburgh's Award Scheme** automatically insures all participants and adult helpers, whilst participating in Award activities which is in addition to cover provided through RPA.

Refer to NG: [Insurance](#)

14 Transport

Refer to NG: [Transport general considerations](#)

When planning offsite visits, schools should consider transport requirements and all national and local regulatory requirements **must** be followed.

Considered factors:

- driver competence, suitability/maintenance of vehicles, insurance, seat belts, weather conditions and driver fatigue.
- supervision necessary in the vehicle as the driver of a vehicle transporting children and/or young people cannot drive and supervise at the same time. A key judgement needs to be made about the likely behaviour and individual needs of the passengers. If any of the children and/or young people require close supervision then another adult should travel in the vehicle to ensure the driver is not distracted.

Note: In the interests of safeguarding, it is recommended that a minimum of two adults travel in each vehicle.

Private cars

Where a private (staff or parent) car is used, this must be approved by the Head Teacher and consent gained from the parent/carer.

Refer to NG: [Transport in private cars](#) and [FAQ Use of private cars](#)

Coaches

The visit leader should ensure that coaches and buses are hired from a reputable company; the school has a list of approved providers and leaders should liaise with the trips' office concerning transport companies.

Minibuses

If visit leaders plan to use the school's minibuses, then a qualified minibus driver must be used; a list of qualified staff can be obtained from the school office.

Refer to NG: [Transport in minibuses](#)

Public transport in London

For public transport within the Greater London area contact 'Transport for London', who offer free travel for school parties on London buses, Underground, Tramlink, and Docklands Light Railway to cultural destinations.

See [Transport for London - School Parties](#) Email. schoolparty@tfl.gov.uk

Appendix 1: Types of visits and activities

1 Farm Visits

Staff should ensure that the intended outcomes of the activity are balanced with reasonably practicable safety precautions.

Refer to NG: [Farm Visits](#)

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

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

2 Water-Margin Activities

This section applies to:

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

* 'gentle' means hardly moving at all.

'shallow' typically means up to the knees of the participants.

Staff should ensure that the intended outcomes of the activity are balanced with reasonably practicable safety precautions.

At the outset the leader must decide whether the activity:

- a) Falls **within** the definition in bold above - in which case the below guidance applies,
or
- b) **Exceeds** the definition in bold above - in which case this is a water-**based** adventurous activity and section 9 applies.

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

As with all visits, where appropriate there should be an approved alternative 'Plan B' that could be used where conditions dictate, and for which parental consent has been obtained if necessary.

School approval is not required for water-margin activities but the leader must have previous relevant experience and must have been assessed as competent to lead the activity by the EVC and/or Head Teacher.

Refer to NG: [Natural Water Bathing](#)

3 Residential Visits

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

Staff should ensure that the intended outcomes of the activity are balanced with reasonably practicable safety precautions.

[A Guide to High Quality Outdoor Learning and Residential Experiences](#) can be used as tools by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. It can also help the leader in providing clarity to a provider when designing a programme.

Refer to NG: [Residential Visits](#)

4 Overseas Visits

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

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions

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

- a) Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- b) Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- c) Transport systems: assessed as safe for use.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: www.fco.gov.uk (from the home page select 'Travel Advice'). All relevant FCO information should be circulated amongst the staff team.

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

For Exchange Visits: Refer to NG: [Exchanges and home stays](#)

For Overseas Expeditions See section 12

5 Weather, Clothing & Survival

Where appropriate, the leader must obtain and act upon up to date 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 and shelter for a casualty;
- Comfort, insulation and shelter for the whole group;
- Provision of emergency food and drink;
- Torch;
- Possible need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas)

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

6 Swimming

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

Staff should ensure that the intended outcomes of the activity are balanced with reasonably practicable safety precautions

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

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

Swimming pools (lifeguarded)

School approval is not required. Please consider the following:

- UK Swimming Pool safety is guided by HSG179 and various other Health and Safety Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that all activities are conducted safely.
- For publicly lifeguarded pools abroad, the school's staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
- Unless suitably qualified, the school's staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.
- For swimming lessons, the school should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current Health and Safety guidelines.

Refer to NG: [Swimming pools](#)

Hotel (and other) swimming pools

Schools should check the lifeguarding position in advance.

If lifeguarding arrangements are not provided at the pool then the visit leader will bear the full responsibility for ensuring swimming safety, and approval to lead the activity will be required via EVOLVE.

The following awards/qualifications apply:

For free swimming activity

- A valid Pool Lifeguard Qualification, or equivalent in the country visited - see www.lifesavers.org.uk or www.sta.co.uk

For structured or programmed activity

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

The role of the lifeguard is:

- To directly supervise the pool and the pool users, exercising appropriate levels of control. (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)
- If necessary, brief pool users in advance regarding rules (eg. no diving, running, etc.).
- To communicate effectively with pool users.
- To anticipate problems and prevent accidents.
- To intervene to prevent behaviour which is unsafe.
- To carry out a rescue from the water.
- To give immediate first aid to any casualty.

The above must be accomplished in the context of the normal operating procedures and the emergency action plan for the pool, which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool.

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

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

Refer to NG: [Swimming pools](#)

Open water swimming (ie not in a swimming pool and not a 'water-margin' activity)

School approval is required via EVOLVE.

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, ie. is it a planned activity?

The designated lifeguard must be dedicated exclusively 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.

For free swimming activity

- 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

For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRSTAC) or equivalent - see www.lifesavers.org.uk or www.sta.co.uk
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement.
see www.lifesavers.org.uk

Refer to NG: [Natural Water Bathing](#)

7 Definition of an 'adventurous activity'

The following activities are regarded as 'adventurous' and require school 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 (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coastering/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
- Off road cycling
- 'Extreme' sports
- Other activities (eg. initiative exercises) involving skills inherent in any of the above

* 'Open country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the local authority if you think this might apply. For level of competence required to lead in open country see section 10

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

- Walking in parks or on non-remote country paths
- Physical Education activities and sports fixtures (other than the above)
- Field studies - unless in the environments stated in 'open country'
- Swimming in lifeguarded pools
- Theme parks, Tourist attractions
- Pedal go-karts
- Ice skating (rink)
- Farm visits
- Local traffic survey
- Museum, library, etc.
- Water-margin activities as defined in section 2

Please contact the EVC if there is uncertainty over whether a particular activity requires school approval.

8 Adventurous Activities

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

[Water-based activities](#) - section 9

[Open country activities](#) - section 10

[Snowsports](#) - section 11

[Overseas expeditions](#) - section 12

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

Staff should ensure that the intended outcomes of the activity are balanced with reasonably practicable safety precautions.

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

- a) **An external provider** - see Appendix 2, section 3

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

Note: If a Provider holds an [AASCHOOL 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 school's staff** - see Appendix 2, section 2.

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

9 Water-Based Activities

For clarification between water-margin and water-based activities see section 2

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

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

- Swimming in publicly lifeguarded pools - see section 6.
- Water-margin activities as defined in section 2
- 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 are required to be reviewed by 'EES for Schools'.

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

- a) **An external provider** - see appendix 2, section 3

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

Note: If a Provider holds an [AASCHOOL 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 school's staff** - see appendix 2, Section 2

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

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

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

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

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

10 Open-country activities

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

For the purposes of school 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 school if you think this might apply.

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

- a) **An external provider** - see appendix 2, section 3
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 school's staff** - see below
This person must be specifically approved by the school to lead the activity via EVOLVE.

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

- a) For leaders of walking groups outside the UK or Ireland, please contact the school 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 appendix 2, section 2
- 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 appendix 2, section 2
- 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 www.countrysideleaderaward.org
 - Lowland Leader Award www.mltuk.org
 - Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL) www.bst.org.uk
 - Completion of a suitable 'Leader Training' Course.
 - A written statement of competence by an appropriate technical adviser see appendix 2, section 2
 - Evidence of recent, relevant experience, appropriately corroborated.
 - An assessment of competence (written or implied) by the Head Teacher.

11 Snow-sports

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

Snow-sports (eg skiing and snowboarding) are regarded as adventurous activities, and the visit therefore is required to be reviewed by 'EES for Schools'.

There are advantages to snow-sports taking place during term time as opposed to during the school holiday period however, as with all visits, this must be balanced with curriculum requirements.

A member of staff intending to organise a snow-sport visit must have previously accompanied at least one educational snow-sports visit.

Young people may only participate in snow-sports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snow-sports school. Schools 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 school via EVOLVE.

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

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

See EVOLVE Resources for the current good practice guidance on helmets for snow-sport 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 complied with.

Important: For resorts in USA or Canada, the school must check the 'liability waiver position' prior to making a commitment.

Refer to NG: [Snowsport visits](#)

12 Overseas Expeditions

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

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

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

Overseas Expeditions will only be approved through the EVOLVE system 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*](#)

For providers that do not hold an LOtC Quality Badge, 'Guidance for Overseas Expeditions, Edn.4' should be referred to when the proposal is initiated. This document contains information for both schools and providers, and includes a checklist that **must** be considered prior to the school 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, schools should particularly consider the educational aims of the venture and that the requirements relating to 'Best Value' are met.

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

Refer to NG: [*Overseas Expeditions*](#)

Appendix 2: Staff Guidance

1 Emergency Procedures

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

Refer to NG: [Emergencies and critical incidents](#)
[Emergencies - the establishment's role](#)
[Emergency procedures for visit leaders](#)

Emergency planning and critical incident support

A critical incident is defined when any member of a group undertaking a LOtC / OEV activity:

- has suffered a life-threatening injury or fatality
- is at serious risk; or
- has gone missing for a significant and unacceptable period

The School's Emergency Plan is in place to support schools/services in the event of emergencies and critical incidents. Specifically for Schools, reference should be made to and compliance with, the [Emergency Advice and Support for Educational Establishments \(EASEE\)](#) document that has been developed by the CSW Resilience Team.

The Emergency Base Contact details will be issued to, and carried at all times, during the LOtC / OEV activity, by the Visit Leader and supervisors.

If a critical incident does occur, the Visit Leader will contact their Emergency Base Contact.

The Emergency Base Contact will then contact the CSW Resilience team for further support and advice, using the 24-hour duty telephone number. [CSW - Warwickshire Guidance & Advice](#)

Refer to National Guidance document: [Off-site visits emergencies - an establishment's role](#)

2 Approval for staff to lead an adventurous activity

Procedure for obtaining approval

Staff who wish to **lead** (ie. supervise or instruct) an adventurous activity 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 school 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 school.

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

In cases where no National Governing Body exists, the school 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 school on the Visit Form.

Where there is insufficient information for the SCHOOL 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 school.

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 Teacher and/or EVC.

3 Using an External Provider

An 'External Provider' is defined as where there is an element of adventurous activity instruction, staffing, or guiding, for example:

- Activity Centre
- Ski Company
- 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 school approval, an External Provider is not a:

- Leisure centre providing non-adventurous activities
- Swimming Pool
- Youth Hostel (where accommodation only is used)
- Hotel, B&B, Campsite, etc
- Museum, gallery, etc
- Tourist attraction
- Theme Park
- Farm
- Coach, Train, Ferry, or Airline company
- Climbing Wall where instruction is provided by a member of your school'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 Teacher. The school does not 'approve' external providers or tour operators. Schools will find it useful to 'Search by External Provider' on EVOLVE, and liaise with other Schools that have used a particular provider.

Schools should consider the requirements under 'best value' when selecting an external provider.

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

- a) The Provider holds an LOTC Quality Badge www.lotcqualitybadge.org.uk or www.kaddi.com

or

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

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

Note: EVOLVE automatically identifies providers that hold an LOTC Quality Badge, via the linked search tool Kaddi www.kaddi.com

Procedure for Providers that hold an LOtC Quality Badge

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

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

Procedure for Providers that **do not** hold an LOtC Quality Badge

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

- Download a [Provider Form](#)
- Complete the top section.
- Send Provider Form to the provider (email or post).
- On its return check that it has been satisfactorily completed.
- Keep Provider Form on file together with all other relevant documentation.
- It is recommended that you attach the Provider Form to the EVOLVE Visit Form.

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 'EES for Schools' 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.⁹

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 school. A pre-visit and recommendation from previous users will help you decide on its suitability.

In some instances, for example where a school 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](#)

Appendix 3: Further Staff guidance for the organisation of trips/visits

The following guidelines are for clarification:

- Trips/visit involving no payment must be fully completed and have full approval from the EVC and the Head must be received at least **three weeks** before the departure date.
- Non- residential trips involving parent pay must be fully completed with full approval from the EVC and the Head at least **six weeks** before the departure date.
- Residential trips must be fully completed with full approval from the EVC and the Head at least **ten weeks** before the departure date.
- To deliver the maximum educational benefit, trips must be led by a member of staff with expertise in that particular area of interest.
- The Finance team can only 'action' the planned trip after it has received Head Teacher approval.
- Once a deadline for payment has been set and the payment on parent pay closed, it cannot be reopened.
- Failure to meet these deadlines will mean the trip may not go ahead.

