EDUCATIONAL AND OFFSITE VISITS AND RELATED ACTIVITIES POLICY

Blessed Edward Bamber Catholic Multi Academy Trust

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Blessed Edward Bamber
Catholic Multi Academy Trust

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1.1	CEO		New Policy
1.2	CEO	Nov 23	Add in minimum level of PLI required on advice of external EVC (section 14)
2.1	CEO	June 2024	Section 2 – Visit leader training – add in National College Section 17 – add in paragraph for VL to access relevant country information from the FCDO travel advice and circulate to all staff. Policy checked and approved by external EV Advisor.
2.2	E		• Expansion of the section on responsibilities • Expansion of the section on sign off of visits • Updated links to National Guidance documents • Updated links to RLSS courses • Addition of section on Aqua Parks • Addition of guidance when walking groups near roads • Link to a new eLearning course on preventing incidents on This is a Trust-Wide Policy which applies to all academies within the Trust visits

PLEASE NOTE:

WHERE THIS POLICY REFERS TO 'HEADTEACHER' THIS INCLUDES EXECUTIVE HEADTEACHERS AND INTERIM/ACTING HEADTEACHERS.

Proverbs 1:5

"Let the wise hear and increase in learning, and the one who understands obtain guidance."

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1 Introduction

The purpose of this document is to link the requirements of The Blessed Edward Bamber Catholic Multi Academy Trust (BEBCMAT) with National Guidance and EVOLVE.

BEBCMAT acknowledges that educational visits and off-site activities provide invaluable opportunities for children and young people to engage with the world beyond the classroom. These experiences enrich learning, build confidence, develop social and emotional skills, and foster a deeper connection to communities, environments, and subjects of study.

The Trust has adopted the Outdoor Education Advisers' Panel 'National Guidance': www.oeapng.info Reference is made to National Guidance throughout this document.

The Trust uses the web-based system EVOLVE to facilitate the efficient planning, management, approval, and evaluation of visits. All staff who lead or accompany visits can access their own EVOLVE account, which is set up by their establishment's Educational Visits Coordinator (EVC). As well as being an efficient tool for planning and approving visits, EVOLVE also includes additional features such as search and report facilities, downloadable resources, staff records and visit history, plus links to both National Guidance and the National Library www.national-library.info.

Refer to National Guidance document 1.b *Foundations*

This Policy and Guidance document is designed to support all BEBCMAT establishments in planning and delivering safe, meaningful, and high-quality educational visits. It sets out the principles, responsibilities, and best practices that underpin effective visit management, while promoting a balanced approach to risk and benefit. Whether the activity is a short local walk, a residential stay, or an overseas expedition, this document aims to ensure that all learners have access to enriching experiences that are well-planned and responsibly led.

It is intended for use by school leaders, visit coordinators, teachers, and any staff or volunteers involved in organising or supervising educational visits. By following this Guidance, establishments can be confident in their legal responsibilities and in providing rewarding learning opportunities outside the classroom.

2 Responsibilities

Under the Health and Safety at Work etc. Act 1974, the legal duty for ensuring the health and safety of participants during educational visits rests with the employer. This includes providing clear policies, procedures, and support systems that enable staff to plan and deliver visits safely and effectively.

For all schools/academies within BEBCMAT, the employer is the Trust. The Trust requires its academies to follow this guidance. All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place.

Refer to National Guidance *Checklists*

This Guidance is intended to be used whenever an establishment organises an activity or visit that takes place away from its usual base and involves children or young people. It is designed to assist with the planning, risk assessment, and overall management of such experiences, helping ensure they are both safe and educationally valuable.

When it comes to Physical Education (PE), schools should refer to subject-specific guidance, such as that provided by the Association for Physical Education (AfPE). Where PE activities take place off-site, only the travel component falls within the scope of this Guidance.

Every individual involved in a visit—whether they are leaders, helpers, or participants—has a defined role and associated responsibilities. These roles must be clearly understood by all parties before the visit takes place.

Delivering safe, memorable, and well-managed educational visits relies on a clear understanding of the roles and responsibilities held by those involved. Successful planning and execution require a coordinated approach, where each individual understands their contribution and acts within their level of training, competence, and authority.

This section outlines the key roles typically involved in organising and leading educational visits. These may vary depending on the size and structure of the establishment, but the core principles remain consistent.

Trustees

These strategic leaders are responsible for establishing a framework that supports safe and inclusive visits. Their role is to provide challenge and support to school leaders, ensuring policies are in place, staff are appropriately trained, and that the value of educational visits is understood and championed.

Headteachers and Senior Leaders

School leaders hold overarching responsibility for ensuring that visits are well planned, risk-assessed, and delivered in accordance with the employer's expectations. They must ensure that staff are competent, that procedures are followed, and that there is a system in place to approve visits. While they may delegate aspects of this responsibility, they remain accountable for the overall approach to visits and off-site learning.

Educational Visits Coordinator (EVC)

The EVC acts as the operational lead for visits, offering advice, oversight, and quality assurance. They are the key contact for staff planning visits, ensuring that plans align with guidance and policy. The EVC must be experienced, confident in managing visits, and able to guide others. In some settings, this role may be undertaken by the headteacher or another senior leader.

To help fulfil its health and safety obligations for visits and to comply with DfE Guidance, all BEBCMAT schools will appoint an Educational Visits Coordinator (EVC) who will support the Headteacher. In small schools the Headteacher may be the EVC. Should the school choose not to appoint an EVC, those functions will automatically fall to the Headteacher.

The EVC should attend EVC training (minimum 6 hours) as soon as possible after appointment. All BEBCMAT EVCs attend EVC update meetings and failure to do so will require the EVC to complete full EVC training again when 3 years has elapsed. Contact the BEBCMAT Educational Visits Adviser for information about training and update opportunities.

The EVC should support the Headteacher in ensuring that competent staff are assigned to lead and accompany visits, see Section 11, and with approval and other decisions.

The EVC must ensure that a policy is in place for educational and off-site visits, and that this is updated as necessary.

Visit Leaders

Visit Leaders take day-to-day responsibility for organising and leading visits. They ensure that planning is thorough, supervision is appropriate, and that the educational aims of the visit are met. They make dynamic decisions during the visit and are accountable for the safety and wellbeing of the group.

All leaders have a legal duty of care and must comply with the employer's policy and guidance.

The Visit Leader has overall responsibility for a visit. This includes the learning, development, supervision and welfare of the participants and the health and safety of all, including any other leaders and helpers.

In order to help ensure the safety of participants, and to maximise learning outcomes and enjoyment, it is recommended that visit leaders complete a Visit Leader Training Course. Contact the BEBCMAT Educational Visits Adviser for information about Visit Leader training opportunities.

Assistant Leaders

Where a visit includes multiple groups or specific activities, other adults may lead individual elements. Activity Leaders are responsible for their group during a particular task or session. Assistant Leaders support either the Visit Leader or Activity Leaders, stepping in if needed and contributing to effective group management.

Helpers

Helpers may include support staff, parents, or other adults assisting with supervision and practical tasks. They work under the direction of the visit leadership team and must understand their responsibilities. Helpers should never be left in sole charge unless appropriately trained and designated.

Volunteers

Volunteers may support visits in a variety of roles. Regardless of their employment status, anyone leading or assisting on a visit must meet the required standards for that role, including any safeguarding checks or training.

3 Sign off/approval

All educational visits must receive appropriate sign off before they take place. This ensures that every visit is subject to proportionate planning, scrutiny, and oversight, with a focus on safeguarding participants, managing risk, and supporting high quality learning outcomes.

The approval process will vary depending on the nature of the visit, the level of complexity or risk, and the structure of the establishment. However, all visits must pass through a clearly defined process, with a record of who has authorised the visit and on what basis.

Approval Stages

1. Visit Leader Preparation

The Visit Leader is responsible for initial planning and must ensure that all necessary arrangements, such as staffing, venue suitability, risk management, and medical needs, are considered and documented.

2. EVC Review

Where an EVC is in place, they should review the proposed visit to confirm that it meets the establishment's standards, that planning is complete and proportionate, and that the Visit Leader is suitably competent.

3. Headteacher or Senior Leader Approval

Final internal approval typically rests with the Headteacher or a delegated senior leader. They confirm that the visit is justified, appropriately resourced, and compliant with employer policy and any legal requirements.

4. Educational Visits Adviser sign off

Some visits, especially those involving overseas travel, adventurous activities, or overnight stays, necessitate the external Educational Visits Adviser's explicit sign off. Establishments must follow the procedures set out above and understand which types of visits fall into this category.

Categories of Visit

Visits may be categorised according to their level of complexity. This helps determine the level of scrutiny required:

Routine/Standard Visits: Local, low-risk visits that are regularly repeated and covered by standard operating procedures.

Enhanced Visits: One-off or higher-risk visits requiring bespoke planning and additional oversight.

High Complexity Visits: Trips involving overseas travel, hazardous activities and/or remote environments require adviser sign-off.

Record Keeping and Audit Trail

All approved visits must be logged using BEBCMAT's Evolve site. Documentation should include:

- The visit plan and itinerary
- Risk management plans
- Staff roles and emergency base contacts
- Copies of consents and medical information
- The approval record

This ensures accountability and supports post-visit review and evaluation.

4 Outcomes

Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved.

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

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

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

High Quality Outdoor Learning can be used as a tool 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.

5 Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against people with certain protected characteristics, without material or substantial justification. You are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. 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 to aid inclusion should not impinge unduly on the planned purpose of the activity.

6 Planning and risk management

How much planning?

The extent of planning required is related to the complexity of the visit

Two levels of documentation: Generic and Event Specific

Generic documents can be used to cover the significant risks that you would always expect to manage in any relevant experience or activity. They include school policies, National Guidance, and Trust guidance. They should ideally include a Local Area Visits policy and procedures for managing routine activities, such as using transport, supervision of swimming pool changing areas, dismissal of students from venues, etc.

Event Specific documents could record all significant findings for a particular visit, or they may simply record issues not covered by existing generic documents. Note: If existing generic documents cover everything then there is no need to repeat anything.

Local Area Visits (if designated)

This refers to specified visits/activities within a designated geographical area that are part of the normal curriculum and take place during the normal school day. If the school has designated a Local Learning Area, then these activities should simply follow the Standard Operating Procedures stated, and do not normally need additional documentation.

Activities in the Local Learning Area should be recorded either via Evolve or via a 'Signing Out' sheet left with the school office before departure.

If desired, and where parental consent is obtained, activities outside normal school hours could be included within the Local Learning Area policy, such as after school clubs, sports fixtures, evening activities, etc.

The remainder of the section relates to activities outside the Local Learning Area

Activities that are not included within your Local Learning Area will be more complex in nature and therefore need additional planning and risk management. These will include the following:

- Day visits that are more complex or further afield
- Overseas visits

- Residential visits
- Adventurous activities

Planning Meeting

In the early stages of planning, it is good practice for the visit leader to convene a planning meeting, ideally including all staff involved in the visit. This meeting will provide the opportunity for information to be shared amongst colleagues, discussions to take place, decisions made and for relevant details to be recorded. Such a meeting helps ensure that everyone understands the plan and that everyone has opportunity to contribute to it. This process of sharing, discussion, decision making, and recording should be ongoing throughout the planning phase.

What to record and how?

Risk assessment is a process, and not a document. HSE legislation dictates that the significant findings of the risk assessment process must be recorded, but it does not state any particular format for this. The 'significant findings' are a combination of the identified issues and what is being done about these. There is no legal requirement to document the findings of the risk assessment process in any particular format, therefore it is up to the school and visit leadership team to decide what format works best and will be most useful for them. Options could include any, or a combination of the following:

- Event Specific Plan on EVOLVE;
- A risk management plan (uploaded to EVOLVE);
- A mind-map or annotated illustrations (photographed and uploaded to EVOLVE);
- Handwritten notes (photographed or scanned and uploaded to EVOLVE).

Information recorded could include:

- Planning notes, decisions made, comments, etc.
- Participant briefing notes and 'rules'
- Operating procedures
- Event Specific Notes
- Risk assessment findings
- Other documents, e.g. letter/s to parents, itinerary, kit list, etc.

Additional notes on risk management

- It is not possible to eliminate all risks, but they should be reduced to an *acceptable* or *tolerable* level. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity - see *Managing Risk in Play Provision* An activity should only take place if, in the professional judgement of the leader, the residual risk following implementation of any control measures is deemed to be acceptable.

- It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions, will become more 'risk aware' and hence at less risk. They will also have greater ownership of the event. This is endorsed by HSE in *Principles of Sensible Risk Management*
- 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.
- Where an adventurous activity is to be delivered by an external provider, the provider will have responsibility for managing the activity (see Section 29). As such, the provider's risk assessments are not the concern of the school leader, do not need to be requested from the provider, and do not need to be uploaded to EVOLVE. Refer to National Guidance document 6a *FAQ Asking for a provider's risk assessments*

- To inform future visits, it is good practice to record any significant issues following the visit evaluation.

7 Safety during the visit

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

The ongoing monitoring of all aspects of the visit by the leader and accompanying staff is an essential aspect in the risk management of visits, and hence the safety of participants. It also contributes towards enjoyment and learning.

Risks should therefore be monitored throughout the visit, and where appropriate activities must be modified (e.g. Plan B), or curtailed, to suit changed or changing circumstances, for example: an over-busy lunch area, rain, rising water levels, etc. This is primarily the responsibility of the visit leader, in consultation with other staff where appropriate.

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

Refer to National Guidance documents:

4.3c *Risk Management – an Overview*

3.4k *Responsibilities of the Visit Leader*

8 Parent/carer consent

Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school.

However, it is good practice to inform parents of these activities. It is recommended that blanket consent is obtained from parents/carers at the start of each school year or when a child joins the school if it is mid-year.

Specific written consent is usually only requested for activities that need a higher level of risk management or those that take place outside school hours. Schools 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, etc., is an acceptable alternative to paper-based consent forms.

Refer to National Guidance document 4.3d *Parental Consent*

9 Competence to lead

The competence of the visit leader is the single most important contributory factor in the safety of participants. The EVC and/or Headteacher must therefore consider the following when assessing the competence of a member of staff to lead a visit:

a. What experience has the leader in leading or accompanying similar or other visits? (check Staff History on EVOLVE).
   a. Has the leader completed a Visit Leader Training course?
   a. Is the leader competent in planning and managing visits?
   a. What are the leader's reasons for undertaking the visit?

a. Is the leader an employee of the Trust/school?

a. Does the leader have the ability to manage the pastoral welfare of participants?

a. Does the leader exhibit sound decision-making abilities?

a. What experience has the leader of the participants they intend to supervise?

a. What experience has the leader of the environment and geographical area chosen?

a. Does the leader possess appropriate qualifications?

a. If appropriate, what is the leader's personal level of skill in the activity, and fitness level?

a. If leading adventurous activities, has this been approved by the Trust?

a. Is the leader aware of all relevant guidelines and able to comply with these?

Refer to National Guidance document 3.2d *Approval of leaders*

10 Staffing and supervision

On all visits there must be an effective level of supervision that has been approved by the EVC and Headteacher.

The Statutory Framework for the Early Years Foundation Stage no longer differentiates between outings and onsite settings as regards minimum specified ratios.

For all other visits the visit leader, EVC and Headteacher must make a professional judgement regarding the number and suitability of staffing on an individual visit basis, after consideration of the following factors:

- 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.

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

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits. This situation could only arise where a staff member's child/ren attend the school or a family member is acting as a volunteer.

Refer to National Guidance document 4.2a *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 National Guidance document 3.2g *Vetting and DBS Checks*

Direct, Indirect and Remote Supervision

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

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

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

Remote supervision is where 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

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 taking place;
- Preparatory training;
- The competence of the 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 National Guidance documents: 4.3b *Ratios and Effective Supervision*

4.2a *Group Management and Supervision*

3.2g *Vetting and DBS Checks*

11 First aid

For all visits there should be a responsible adult with a good working knowledge of first aid appropriate to the environment (e.g. urban, remote, water, etc.)

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, especially in circumstances where it is likely that access by the emergency services may be delayed.

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

For EYFS outings, there must always be at least one member of staff present who holds a current Paediatric First Aid certificate.

Refer to National Guidance document 4.4b *First Aid*

Refer to *Statutory Framework for the Early Years Foundation Stage*

12 Insurance

Advice regarding insurance may be sought from the Trust's Insurance company section. (See Contacts).

At the time of writing, for travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all eligible participants must hold a valid GHIC (Global Health Insurance Card).

Refer to National Guidance document 4.4c *Insurance*

13 Travel

Refer to National Guidance document 4.5a *Transport general considerations*

Private cars

Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Headteacher, and a private car form must be completed and retained by the school (on an annual basis if appropriate).

Refer to National Guidance documents 4.5c *Transport in private cars*

Coaches

The Trust does not 'approve' coach companies. Whilst UK legislation ensures that coach companies are fit for public use, the facilities available on coaches may vary. Liaising with other schools within the Trust that have used a particular company (via. EVOLVE/RESOURCES/SEARCH) will help to determine the level of service that may be provided.

Refer to National Guidance document 4.5e *Hiring a coach*

Minibuses

Schools that own or hire a minibus must have an operational policy in place for this.

Refer to National Guidance document 4.5b *Transport in minibuses*

Walking/crossing roads

This is undoubtedly one of the more dangerous activities leaders and groups will undertake. It should not be assumed that motorists understand or are aware of the needs of the group or of common practices.

Technically, only the police, traffic wardens and officially designated school crossing patrols have the right under law to control traffic. Liaison with the local police

may well enable an agreement to be reached over a particular crossing strategy and the use of high-viz tabards or similar. This liaison is recommended where practical. Leaders should consider a progression of options for road crossings:

- Is it possible to plan a route which requires no road crossing at all?
- If roads must be crossed, is it possible to use formal crossing points, bridges, Zebra crossings, Pelican crossings, etc?
- If none of the above are possible, and having established that there is not a suitable alternative, it is important to have an agreed and understood procedure which you can apply as well as circumstances

allow, as would a responsible person. Focus on a professional approach to Dynamic Risk management, taking account of the group, the leaders, the location and the conditions (traffic, weather, etc.) at the time

NB: Other than at light controlled or Zebra crossings, cross only when the road is

clear of traffic. Do not deliberately plan to physically stop traffic, and do not put adults in the way of moving vehicles. If using light controlled or Zebra crossings, ensure all vehicles have stopped and registered your presence and intentions before crossing. Try to gain eye contact with drivers and monitor all children and traffic throughout. If in doubt, do not proceed.

14 Farm visits

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

Refer to National Guidance document 7.1g *Farm Visits*

15 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.

If the activity exceeds the above definition, then this is classed is a water-based adventurous activity needing Trust approval, and Section 21 applies.

If the activity falls within the above definition, this is classed as a 'water-margin' activity and the following applies:

a. All staff involved in the activity should be conversant with, and adhere to the guidance contained within National Guidance document 7i *Group Safety at Water Margins* This document must be made available to all supervising adults in advance of the visit
b. Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.
c. 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.
d. Although LA approval is not required for water-margin activities, the leader must have previous relevant experience, and must have been assessed as competent to lead the activity by the EVC, Headteacher, and/or another competent person.

Refer to National Guidance document 7i *Group Safety at Water Margins*

16 Residential visits

Staff should ensure that the intended outcomes of the activity are balanced with all 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 National Guidance document 4.2b *Residential Visits*

17 Overseas visits

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 and drugs.
a. Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
a. Transport systems have been assessed as safe for use.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Development Office website: https://www.gov.uk/foreign-travel-advice. All relevant FCDO information should be circulated amongst the staff team.

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

Following Brexit there may be the requirement for some staff and students to hold visas to travel. This must be checked in advance.

For Exchange Visits: Refer to National Guidance document 7f *Exchanges and home stays*

For Overseas Expeditions See Section 24

18 Weather, clothing and survival

Before any visit begins, the leader must obtain and act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate to:

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

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

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

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

19 Swimming

All swimming activities and venues must be included within the visit plan. With the exception of UK public pools, all lifeguarding arrangements must be 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)

Trust approval is not required for lifeguarded swimming pools in the UK.

- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.
- For publicly lifeguarded pools abroad, the 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, each school should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

Refer to National Guidance documents: 7.1x Swimming pools

It is recommended that schools use the specific NG Swimming Provider Form when using a lifeguarded swimming pool in the UK - 8.1r *Swimming Provider Statement*. This form should be used for scheduled school swimming lessons at the start of an academic year.

Hotel (and other) swimming pools

Trust approval is not required for this activity if qualified lifeguarding is provided at the pool.

Schools should check the lifeguarding position in advance.

The following awards/qualifications apply:

For free swimming activity

- A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited see www.rlss.org.uk

For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see www.rlss.org.uk *or*
- 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 (e.g. 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.

School 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 National Guidance document 7.1x *Swimming pools*

Open water swimming (i.e. not in a swimming pool and not a water-margin activity)

Trust approval is required.

Particular consideration should be given to the following factors:

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

The designated lifeguard must be dedicated 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.

For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent *or*
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement.

Refer to National Guidance document 7.1o *Natural Water Bathing*

20 Adventurous activities

The following activities are regarded as adventurous and require Trust approval:

- Abseiling;
- Air Activities (excluding commercial flights);
- All activities in 'open country';
- All forms of boating (excluding commercial transport);
- Aqua Parks/Water Parks;
- Archery;
- Camping;
- Canoeing / kayaking;
- Coasteering/coastal scrambling/sea level traversing;
- High level ropes courses;
- Hill walking and Mountaineering;
- Horse riding;
- Motor sport – all forms;
- Mountain and Off Road biking;
- Orienteering;
- Rafting or improvised rafting;
- River/gorge walking or scrambling;
- Rock climbing (including indoor climbing walls);
- Sailing / windsurfing / kite surfing;
- Shooting;
- Snorkel and aqualung activities;
- Snowsports (skiing, snowboarding, and related activities), including dry slope;
- Stand up paddleboarding (SUP);
- Swimming (all forms, excluding publicly lifeguarded pools);
- Trampoline parks;
- Underground exploration;
- Use of powered safety/rescue craft;
- Water skiing;
- 'Extreme' sports.

'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 Trust adviser if you think this might apply. For level of competence required to lead in open country see Section 22.

The following activities are not regarded as adventurous, 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 Headteacher is competent to supervise the activity:

- Walking in parks or on non-remote country paths
- Field studies - unless in the environments stated in 'open country'
- Swimming in publicly lifeguarded pools
- Theme parks
- Tourist attractions
- Pedal go-karts
- Ice skating (rink)
- Farm visits
- Local traffic survey
- Museum, library, etc.

- Water-margin activities as defined in Section 15

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

a) **An external provider** - see Section 29.

The provider must hold an *LOtC Quality Badge* or complete a Provider Form. LOtC Quality Badge providers can be found on https://kaddi.com

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

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

or

b) **A member of your school's staff** – see Section 28.

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

21 Water based activities

For clarification between water-margin and water-based activities, see Section 15.

The following are not regarded as adventurous activities for the purposes of this guidance:

- Swimming in publicly lifeguarded pools - see Section 19.
- Water-margin activities as defined in Section 15.
- 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.

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

a) An external provider - see Section 29.

The provider must hold an *LOtC Quality Badge* or complete a *Provider Form*. *LOtC Quality Badge providers can be found on https://kaddi.com*

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

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

or

b) A member of your school's staff – see Section 28.

This person must be specifically competent and approved by the Headteacher to lead the activity, via EVOLVE.

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

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

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

a) takes place in a swimming pool, *or*

b) is 'swimming', *or*

c) is an activity for which personal buoyancy would not normally be worn by young people.

22 Open country activities

For the purposes of Trust 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 Trust Adviser 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 Section 29.

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 Headteacher 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,

- International Mountain Leader Award (IML) - see the Mountain Training UK Website.

b) For leaders of walking groups in mountainous terrain within the UK and Ireland

- Mountain Leader Award (ML) Summer or Winter as appropriate - see the Mountain Training UK Website *or*

- A written statement of competence by an appropriate technical adviser – see Section 28.

c) For leaders of walking groups in summer conditions in non-mountainous hilly terrain

(Known variously as upland, moor, bog, hill, fell or down), with well-defined obvious boundaries, such as roads and coastlines, and where any hazards within it are identifiable and avoidable, and where wild camping or movement on steep ground is not involved.

- Hill & Moorland Leader Award (HMLA) - see the Mountain Training UK Website *or*

- A written statement of competence by an appropriate technical adviser - see Section 28.

d) For leaders of walking groups in terrain 'easier' than that defined in c)

The leader must demonstrate an appropriate level of competence. This may include one or more of the following:

- Countryside Leader Award (CLA) www.countrysideleaderaward.org
- Lowland Leader Award (LLA) - see the Mountain Training UK Website
- Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL)
- Completion of a Visit Leader Training Course.
- A written statement of competence by an appropriate technical adviser, see Section 28.
- Evidence of recent, relevant experience, appropriately corroborated.
- An assessment of competence (written or implied) by the Headteacher.

23 Snowsports

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires Employer approval. There are many advantages to snowsports taking place during term time as opposed to during the school holiday period. These include:

- Greater choice generally,
- Less queueing for lifts and less crowded slopes therefore less chance of collisions occurring,
- Less crowded resort,
- Higher possibility of 'sole use' of accommodation,
- Lessons more likely to be conducted by permanent snowsport school instructors (as opposed to 'casual' instructors),
- Greater likelihood of english speaking instructors,
- Considerable cost savings through avoiding high season (possibly allowing more young people to participate), etc.

The following courses are recommended for all staff involved in organising or accompanying snowsports visits (but not instructing, leading or supervising on snow):

- Snowsport Visits Training Course (SVT) administered by EVOLVE Advice - www.evolveadvice.co.uk/svt
- Snowsport Course Organiser Award (SCO) administered by Snowsport England www.snowsportengland.org.uk

In addition, the visit leader should ideally have previous experience of accompanying snowsports visits.

Young people may only participate in snowsports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports school. Schools should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.

Helmets must be worn by all participants during snowsport activities.

A member of staff intending to lead skiing or snowboarding (i.e.. not using a ski school) must be qualified as below and have been approved by the Headteacher via EVOLVE- see Section 28.

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

- The Alpine Ski Course Leader Award (ASCL) www.snowsportengland.org.uk *or*
- A statement of competence by an appropriate 'technical adviser' – see Section 28.

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

- The Alpine Ski Course Leader Award (ASCL) www.snowsportengland.org.uk *or*
- A statement of competence by an appropriate 'technical adviser' – see Section 28.

The school should check that the leaders qualification is specifically recognised in the area they intend to lead as this can have legal implications.

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

a. Under the direction of a suitably qualified local instructor, AND
a. They will remain within the designated controlled areas, AND
a. Off-piste activities are specifically included within the visit insurance policy, AND
a. A NOTE is added to EVOLVE in advance of the visit, confirming that the above criteria are/will be complied with.

Refer to National Guidance document 7.1v *Snowsport visits*

24 Overseas expeditions

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.

Overseas Expeditions will only be approved by the Trust 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 of vital aspects 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, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met.

Refer to National Guidance document 7q *Overseas Expeditions*

25 Trampoline parks

This section only refers to Trampoline Parks; it does not cover coaching trampolining as a gymnastic activity, or clubs or centres registered with British Gymnastics, for which the Association for Physical Education guidance should be followed.

The use of Trampoline Parks is classified as an adventurous activity and should therefore be entered on EVOLVE.

Refer to National Guidance document 7.1d *Trampoline Parks*

26 Aqua parks

The use of Aqua Parks is classified as an adventurous activity and should therefore be entered on EVOLVE. The provider must be an RLSS approved aqua park https://www.rlss.org.uk/Listing/Category/aqua-parks.

Refer to National Guidance document *7.1z Visitor attractions*

27 Emergency procedures

Schools should ensure that their Health and Safety policy includes offsite visits.

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

In the event if an emergency, visit leaders are recommended to use Emergency Cards as provided by their school.

In an emergency, if it is not possible to reach any of the designated school emergency base contacts, the leader should call the Trust's 24 hour emergency number.

The e-learning course Preventing incidents and managing emergencies course, provided by EVOLVE Advice, is particularly recommended for all those involved in off-site activities - https://www.evolveadvice.co.uk/prime

Refer to National Guidance document 4.1b *Emergencies and critical incidents*

28 Approval of staff to lead an adventurous activity

Procedure for obtaining approval

Staff who wish to lead (i.e. supervise or instruct) an adventurous activity, as defined in Section 20, should first upload details and scanned copies of all relevant qualifications (e.g. 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 (e.g. 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 Headteacher should view the proposed activity in the context of the leader's competencies and qualifications. If the Headteacher does not possess the competence to make this judgement then they should enlist the help of a suitably qualified 'Technical Adviser' (see below), or contact the Lead Approver for further advice.

Criteria for approval

Approval should normally be granted 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.

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

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

Approval should always be subject to a requirement that the leader must act at all times within the remit of their qualifications, and in accordance with National Governing Body Guidelines where these exist.

Technical Adviser

For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Body.

For further clarification regarding the role of a technical adviser.

Refer to National Guidance document 6h *Adventure Activity Qualifications*

29 Using an external provider

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

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

For the purposes of this guidance, an External Provider is NOT a:

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc
- Campsite
- Museum, gallery, etc
- Tourist attraction
- Theme Park
- Farm
- Coach, Train, or Airline company
- Swimming Pool
- 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 Headteacher. The Lead Approver does not maintain a list of 'approved' 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 https://kaddi.com

or

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

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

Procedure for Providers that hold an LOtC Quality Badge

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

- Download a Provider Form from National Guidance.

- Complete the top section.

- Send Provider Form to the provider.

- On its return check that it has been satisfactorily completed.

- Upload the completed Provider Form to EVOLVE, - or keep on file.

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

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

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

In some instances, for example where an 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.

Refer to National Guidance documents 4.4h *Using external providers*

6a FAQ *Asking for a provider's risk assessments*

Contacts

EVOLVE login	https://evolve.edufocus.co.uk/evco10/unknown.asp
Outdoor Education Adviser	Suzanne Holroyd Contact via EVOLVE Messenger or Notes For EVCs and Heads only: Email at suzanne@edvisits.com
Chair of Trust	Elizabeth Kelly ekelly@bebcmat.co.uk
Trust Insurance Contact	Stan Mossop smo@bebcmat.co.uk
Trust Emergency Contact **(24 hour)**	Helen O'Neill hon@bebcmat.co.uk 07311817804

PRIVATE CAR FORM

Use of a private car to transport young people

1	To: The Head of _____ School

I confirm that I am willing to use my own vehicle for transporting young people on educational visits. I accept responsibility for maintaining appropriate insurance cover (see below). I have a current valid driving licence and will ensure that my vehicle is legal and roadworthy in all respects.

2	Signed: _____ Print name: _____

3	Address: _____ _____ _____ _____

4	Date: _____

The Trust and the school reserve the right at any time to request copies of any relevant documentation i.e., Registration Document, MOT, Insurance, and Driving Licence

	Insurance cover required
For teachers, youth workers, or other Trust employees	*'Use by the Policyholder in connection with the business of the Policyholder'*
For parents and other volunteers	*'Use for social, domestic and pleasure purposes'*

EMERGENCY CARD

(VISIT LEADER)

Emergency Card (Visit Leader)

This card or an equivalent must be with the Visit Leader at all times.

In the event of an incident, the Visit Leader should adopt the following protocol:

1. Assess the situation;
2. Safeguard uninjured members of the group (including self);
3. Attend to any casualties;
4. Call emergency services, if appropriate
5. Start recording information/decisions.

If the incident DOES NOT involve serious injury or fatality, and/or is not likely to attract media attention, the Visit Leader should:

- Contact one of the school emergency base contacts.
- Report the incident and seek advice.
- Follow the school Emergency Action Plan. (It is not necessary to contact the Trust).

If the incident DOES involve serious injury or fatality, and/or is likely to attract media attention, the Visit Leader should:

- Contact one of the school emergency base contacts.
- Report the incident and seek advice.
- Follow the school Emergency Action Plan.
- Your base contact should liaise with the Trust (via the number below).
- You will be contacted back as soon as possible by your base contact or the Trust.
- If appropriate, you will be provided with a dedicated number to which you should refer all press, media, parental and other enquiries.
- Contact the British Consulate/Embassy if abroad.
- If practicable, delegate party leadership to a Deputy Leader, in order that you can be contactable at all times and to enable you to coordinate all necessary actions.
- Wherever possible, prevent group members from using mobiles or going online until such time as this has been agreed by the Trust.
- Advise all group members to direct all enquiries to the Visit Leader, and to get approval from the Visit Leader before discussing with anyone else.

<u>When the incident is under control:</u>

- Seek full details of the incident including how and why it happened so far as can be established at this stage.
- Maintain a detailed log of all actions taken and conversations held, together with a timeline. Take photos if appropriate (it may be beneficial to ask someone else to do this).

Name	Home	Mobile
School		
Base Contacts		
Head of School		

Trust		
EVC/Deputy/Other		

EMERGENCY CARD

(BASE CONTACTS)

Emergency Card (Base Contacts)

This card or an equivalent must be with all Base Contacts at all times.

The school's Emergency Base Contacts should have ready access to all visit information, including itinerary, venue details, names, medical information, and emergency contact details for all participants, including staff. This can be either online, via EVOLVE, or in hard copy.

In the event of being contacted by the Visit Leader (or another member of staff involved in the visit), the Base Contact should:

- Confirm the phone number on which the caller can be contacted.
- Note their location.
- Determine the nature of the emergency.
- Determine the type of help required.

If the incident DOES NOT involve serious injury or fatality, and/or is not likely to attract media attention, the Base Contact should:

- Provide the required assistance if possible.
- Seek further advice or pass on details to other establishment contacts who may be able to assist.
- Follow the school Emergency Action Plan. (It is not necessary to contact the Trust).

If the incident DOES involve serious injury or fatality, and/or is likely to attract media attention, the Base Contact should:

- Follow the school Emergency Action Plan
- Inform the Visit Leader that someone will phone them back as soon as possible.
- Contact the Head of school.
- Contact the Trust Emergency Contact number – see below.

<u>When the incident is under control:</u>

- Seek full details of the incident including how and why it happened so far as can be established at this stage.
- Maintain a detailed log of all actions taken and conversations held, together with a timeline.

Name	Home	Mobile
School		
Trust Emergency Contact		
Head of School		
LA Emergency Contact		
EVC/Deputy/Other		