



Guidance for Educational Visits

Document for:

Educational Visits Coordinators
Teachers

Edsential Guidance for Educational Visits and Offsite Activity

Contents		Page
Section 1	<u>General</u>	3
Section 2	<u>Role of the Educational Visits Coordinator</u>	3
Section 3	<u>Approval of Visits</u>	4
Section 4	<u>Outcomes</u>	4
Section 5	<u>Inclusion</u>	5
Section 6	<u>Responsibilities</u>	5
Section 7	<u>Planning</u>	6
Section 8	<u>Safety during the visit</u>	7
Section 9	<u>Parent / Carer consent</u>	7
Section 10	<u>Competence to lead</u>	8
Section 11	<u>Staffing, Supervision and Ratios</u>	9
Section 12	<u>First Aid</u>	11
Section 13	<u>Insurance</u>	11
Section 14	<u>Transport</u>	12
Section 15	<u>Farm visits</u>	12
Section 16	<u>Water-margin activities</u>	13
Section 17	<u>Residential visits</u>	13
Section 18	<u>Overseas visits</u>	14
Section 19	<u>Weather, clothing & survival.</u>	14
Section 20	<u>Swimming</u>	15
Section 21	<u>Definition of an adventurous activity</u>	18
Section 22	<u>Adventurous activities</u>	19
Section 23	<u>Water-based activities</u>	20
Section 24	<u>Open-country activities</u>	21
Section 25	<u>Snowsports</u>	23
Section 26	<u>Overseas expeditions</u>	24
Section 27	<u>Emergency procedures</u>	25
Section 28	<u>Approval of staff to lead an adventurous activity</u>	25
Section 29	<u>Guidelines for Using an external provider/tour operator</u>	27

1. General

The purpose of this document is to link the requirements of Edsential with National Guidance and EVOLVE.

Edsential acknowledges the immense value of off-site visits and related activities to young people and fully supports and encourages those that are well planned and managed.

Edsential adopts the Outdoor Education Advisers' Panel National Guidance which can be found at www.oeapng.info

This document hyperlinks to the main National Guidance site. Hyperlinks are used throughout this document however as this guidance is updated regularly it is not possible to hyperlink to specific sections.

Edsential uses the web-based system 'EVOLVE' to facilitate the efficient planning, management, approval and evaluation of visits. All staff that lead or accompany visits can access their own EVOLVE account which is set up by their Establishment's Educational Visits Coordinator (EVC).

As well as being an efficient tool for planning and approving visits EVOLVE also contains a variety of features including search and report facilities, downloadable resources, a link to the National Library, staff records, visit history and gateway access for parents.

EVOLVE: <https://evolve.edufocus.co.uk/evco10/unknown.asp>

2. Role of the Educational Visits Coordinator

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

The EVC should be specifically competent, ideally with practical experience, in leading and managing a range of visits like those typically run by the Establishment. Commonly, but not exclusively, such competence will be identified in a person on the senior management of the Establishment.

The EVC must attend initial one day EVC training. Subsequent half-day update training (non-compulsory) is available as a refresher and is particularly recommended for those who are involved in the role on an infrequent basis.

The EVC should support the Head of Establishment in ensuring that competent staff are assigned to lead and accompany visits with approval and other decisions refer to [Section 10](#)

The EVC should ensure that a policy is in place for educational and off-site visits and that this is updated as necessary. This should be readily available to staff via their Establishment's own EVOLVE Resources section.

Establishments are advised to consider the merits of adapting the sample 'Educational Visits Checklist' (Word version in EVOLVE Resources) to suit their own circumstances and uploading this to their Establishment's own EVOLVE Resources section.

EVCs should make themselves familiar with OEAP national guidance website refer to relevant section/s of [National Guidance](#) by using the search facility.

Please see the Appendix 9 – The Educational visits flowchart

3. Approval of visits

In approving visits, the Head of Establishment and EVC should ensure that the visit leader has been appropriately inducted/trained and is competent to lead the visit. Refer to [Section 10](#)

'Ad-hoc' activities: Where there are local activities that are a planned part of the curriculum but are dependent upon the right conditions on the day then the visit leader should sign out before departure leaving relevant information with the base contact. Such activities must be addressed in the school policy with a generic management plan in place. Following the activity visit leaders should record the event on the same day on EVOLVE.

All other visits: It is recommended that all other visits are entered onto EVOLVE in order to support Establishments with the planning, processing and monitoring visits.

Based on the visit types EVOLVE automatically directs the flow for approval.

The following visit types are authorised within the Establishment and then checked and approved by Edsential via EVOLVE:

A - overseas

B - residential

C - involving an adventurous activity as defined in [Section 21](#)

Approval is delegated to the Head of Establishment for visits which are not in the visit categories highlighted A, B or C.

4. Outcomes

Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved. Upto four intended outcomes may be recorded on EVOLVE during the planning process. These outcomes can be used for subsequent evaluation.

Educational activity 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 which include:

- 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.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

The [High Quality Outdoor Education](#) document 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 be helpful in assisting the leader in providing clarity to a provider so that expectations from the visit are coherent with the design of the programme.

5. Inclusion

Under the Equality Act 2010 it is unlawful to discriminate against disabled participants because of their disability without material or substantial justification. The Establishment is required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Disability Discrimination 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 the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

6. Responsibilities

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

- For Community, Community Special, Voluntary Controlled, Maintained Nursery schools, Pupil Referral Units and Statutory Youth Groups who are part of the Children and Young People's Department the employer is the Local Authority. These Establishments must adhere to this guidance document.

- For Voluntary Aided, Foundation, Academy, Independent and Free schools, the employer is usually the governing body or proprietor. These Establishments are not obliged to use the guidance of the LA. If these types of schools are using Edsential guidance this should be clearly stated in the Establishment policy for educational visits. If Establishments are not using Edsential guidance, then they are advised to ensure that the systems in place are equally as robust as those of Edsential.

All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place. The visit leader is responsible for allocating these responsibilities.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

7. Planning

EVOLVE provides a means of recording processes during the planning phase and enables the EVC and Head of Establishment to contribute, support and monitor the activity.

The extent of planning required is related to the complexity of the visit. Please refer to:

[Appendix 8 The Educational visits flowchart.](#)

[Appendix 9 SAGED model:](#) Risks are expected to be reduced to an *acceptable* or *tolerable* level and not necessarily eliminated. 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](#)

Many aspects of planning will normally already be in place in the form of existing policies and guidance such as the Establishment's own policy and LA policy. These in conjunction with the EVOLVE Visit Form may be sufficient for a particular visit as it is not necessary to repeat generic policies on EVOLVE.

Owing to the complex nature of off-site visits conventional 'risk assessment' as a stand-alone tool is not particularly useful and can on occasion be misleading. It is of greater benefit to consider the overall 'risk management' of visits by taking all aspects of visit planning and management into account. This can be achieved effectively through a combination of the EVOLVE Visit Form itself and any appended notes and/or attachments.

Visit planning includes consideration of the question: '*What are the really important things that we need to do to keep us safe?*' Visit planning should focus on those issues that are individual to the specific event, considering the needs of the group (including special and medical needs), the experience and competency of the leader and team of staff in the context of the event. Significant issues must be recorded on EVOLVE either in notes or as an attachment and shared with all parties.

This planning process by the leader may be compared to the expectation of a teacher or youth worker to plan a lesson/session/programme which is relevant to the needs of the group.

Planning that includes adventurous activity commonly involves delivery by an external provider (see [Section 29](#)) and the provider will have responsibility for managing 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 visits as in doing so they will make more informed decisions and will become more 'risk aware' and hence at less risk. They will also have greater ownership of the event.

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

Refer to relevant section/s of [National Guidance](#) by using the search facility.

8. Safety during the visit

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

Monitoring of the visit must be ongoing. This contributes towards both enjoyment and safety.

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

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 relevant section/s of [National Guidance](#) by using the search facility.

9. Parent / Guardian Consent

In relation to schools:

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

Written consent is usually only requested for activities that need a higher level of risk management or those that take place outside school hours. Please see section 22.

The LA has prepared a **Parent/Guardian Routine Visits Consent Form** (see Appendix 8) which schools can ask parents to sign when a child enrolls at the school and reviews at the commencement of every academic year. This will cover a child's participation in any of these types of activities throughout their time at the school. These include adventure activities, off-site sporting fixtures outside the school day, residential visits and all off-site activities for nursery schools which take place at any time (including during school holidays or at the weekend). Alternatively, Establishments may devise their own consent form.

Parents / guardians must be informed in advance of each activity and must be given the opportunity to withdraw their child from any school visit or activity covered by the form. The school must have a robust means of ensuring that changes to parent / guardian contact details and child medical details are up to date.

In relation to other Establishments:

Annual consent is appropriate for regular routine activities.

For all other visits consent should be obtained on an individual visit basis. Information provided to parents / guardians prior to granting consent should include full details of the activities and any other significant information. Refer to relevant section/s of [National Guidance](#) by using the search facility.

10. Competence to Lead

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

- The EVC and/or Head of Establishment must therefore consider the following when assessing the competence of a member of staff to lead a visit:
 - What experience the leader has in leading or accompanying similar or other visits? (Check Visit History on EVOLVE).
 - The competence of the leader in planning and managing visits
 - The leader's reasons for undertaking the visit
 - Is the leader an employee of the Local Authority
 - Can the leader manage the pastoral welfare of participants
 - Does the leader exhibit sound decision making abilities
 - What experiences the leader has of the participants he/she intends to supervise
 - What experience the leader has of the environment and geographical area chosen?
 - Does the leader possess appropriate qualifications?
 - If appropriate, what is the leader's personal level of skill in the activity and fitness level?
 - If leading adventurous activities has the leader been 'approved' by the LA?
 - Is the leader aware of all relevant guidelines and are they able to act on these?

Refer to diagram: Educational Visits flowchart

Refer to relevant section/s of [National Guidance](#) by using the search facility.

11. Staffing, Supervision and Ratios

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

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

For all other visits the visit leader, EVC and Head of Establishment must make a professional judgment 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 and requirements of individuals within the group including those with additional needs*
- *The experience and competence of staff and other adults*
- *The venue, time of year and prevailing/predicted conditions*
- *The contingency or 'Plan B' options.*
- *A visit must not go ahead where either the visit leader, EVC or Headteacher is not satisfied that an appropriate level of supervision exists.*

Visit leaders, EVCs and Heads of Establishments often find it helpful to have 'a starting point for consideration'. Where departure from the starting point results in fewer staff the justification should be recorded as a note on EVOLVE.

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

Consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

Staff and volunteers who work *frequently* or *intensively* with or have regular access to young people or vulnerable adults, must undergo an enhanced CRB 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 relevant section/s of [National Guidance](#) by using the search facility.

Ratios and Effective Supervision

Ratios are a risk management issue and should be determined through the process of risk assessment. It is not possible to set down definitive staff/student ratios for a particular age group or activity, although the law does specify minimum ratios for Early Years.

Some guidance documents do set out ratios, but these should be regarded as starting points for consideration rather than being definitive, as they may only be appropriate where the activity is relatively straightforward, and the group has no special requirements. For example, the DfES publication HASPEV (1998) suggested the following starting points.

- School years 1-3, 1:6
- School years 4-6, 1:10/15
- School years 7 onwards, 1:15/20
- For visits abroad 1 adult to 10 pupils

Without special safeguards or control measures, these ratios will **not** be adequate to meet the needs of most residential or more complex visits.

The Early Years and Foundation Stage Statutory Framework sets out specific legal requirements for minimum ratios in this age group, which apply both indoors and on outings. These are complex and include requirements about the qualifications of the staff.

They require a minimum of 2 adults with a group, including at least one person who has a current paediatric first aid certificate, with minimum ratios as follows:

- Age under 2, 1:3
- Age 2, 1:4
- Age 3+, 1:8 or 1:13 depending on setting, time of day and staff qualifications.

Remote Supervision

Young people must be supervised throughout all visits. Where they are unaccompanied by a member of staff or another responsible adult, e.g. D of E expeditions, 'down time' in a shopping centre, etc. This downtime is known as 'remote supervision'.

Remotely supervised activities can bring purposeful educational benefits. The progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including managing risk, self-sufficiency, interaction with the public, social skills and decision making.

In addition to considering the benefits of the activity staff should also ensure that reasonably practicable safety precautions are taken.

The decision to allow remote supervision should be based on professional judgment considering 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 judgment regarding the level of responsibility and maturity of the participants and where that member of staff has decided that it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. This should be recorded as a NOTE on EVOLVE.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

12. First Aid

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

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

Based on the nature of the visit the EVC (or visit leader) should make a professional judgment regarding the level of first aid required.

A first aid kit appropriate to the visit should be carried.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

13. Insurance

Advice regarding insurance may be sought from the Local Authority’s Risk and Insurance section.

For visits abroad, additional travel insurance (sometimes referred to as school journey insurance) **must** be obtained by the school/establishment.

For all other visits it is the responsibility of the Team Manager, Visit Leader and Educational Visits Coordinator to determine whether additional insurance should be taken out. The team should particularly consider the need for additional insurance for residential activities or those involving adventurous activities or hazardous environments.

The responsibility for arranging adequate insurance cover rests with the team manager in conjunction with the organiser for each journey.

Administration of the insurance is dealt with by the Insurance Service on behalf of the Insurers.

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

Refer to: [relevant](#) section of [National Guidance](#) by using the search facility.

If trips require LA approval this must be done via EVOLVE prior to the trip taking place. Failure to doing so may be considered a negligent act for the purposes of insurance and make any claim harder to defend.

14. Transport

The establishment Risk Assessment for Transport should be kept up to date and reviewed on a regular basis.

PRIVATE CARS

Where a private (staff/parent) car is to be used to transport young people then this must be approved by the Head of Establishment. A [PRIVATE CAR](#) Form must be completed and retained by the Establishment on an annual basis. (See appendix 1A and 1B)

COACHES

Edsential 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 Establishments within the LA that have used a particular company (via a search on EVOLVE) will help to determine the level of service that may be provided. For further information please contact the LA Educational Visits Adviser.

MINIBUSES

Establishments that own or hire a minibus must have an operational policy in place for this. Please check your Council details about minibuses and educational visits.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

15. Farm Visits

It is recommended that only LOTC Quality Badge approved farms are used for educational visits.

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

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

Refer to relevant section/s of [National Guidance](#) by using the search facility.

16. 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 all 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 guidance below applies.
- b) **Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and [Section 23](#) 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 if necessary has been obtained.

Edsential approval is 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 and/or Head of Establishment.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

17. Residential visits

It is strongly recommended that schools only use providers with an LOtC quality badge, and where appropriate to the activities an AALA Licence. Edsential acknowledges the immense

educational benefits that residential visits can potentially bring to 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 all reasonably practicable safety precautions.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

18. Overseas visits

Edsential 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. Edsential should be included in the planning of any overseas visits. Please note, a minimum of 6 weeks are required for the approval of any overseas visits.

We strongly recommend that schools use LOtC Accredited providers for overseas trips.

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 have been assessed as safe for use.

The visit leader should consider the relevant country information from the Foreign, Commonwealth and Development Office website: www.gov.co.uk ('Home' page, 'Travel & Living Abroad', 'Travel Information by Country'). All relevant FCDO information should be circulated amongst the staff team.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC or GHIC (European/Global Health Insurance Card).

For exchange visits:

- Edsential has adopted the Outdoor Education Advisers' Panel national guidance document: [Young People's Exchange Visits](#). LA Establishments are required to adhere to all relevant aspects of this guidance. This document is on Evolve in the resources section.
- Refer to the British Council (Learning) www.britishcouncil.org

- To complete the appropriate forms, see Appendix 5. Refer to relevant section/s of [National Guidance](#) by using the search facility.

19. Weather, clothing and survival

Where appropriate 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
- A torch
- A 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., Plan B) to suit changed or changing circumstances. For example, an over-busy lunch area, rain and rising water levels.

20. Swimming

Edsential 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 all reasonably practicable safety precautions

All swimming activities and venues must be included within the visit plan and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad where for example a hotel pool may be available. Please seek advice from Edsential. Please note particular risk management must be carried out by school if a visit of this type is being planned.

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

Swimming pools (lifeguarded)

- 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 Establishment’s staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
- The Establishment’s staff should not have responsibility for lifeguarding, unless the Establishment have a member of staff who is suitably qualified. **However, they do always retain a pastoral role for participants either through direct or ‘remote’ supervision.**
- For swimming lessons, Edsential and the LA Establishment should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

Hotel (and other) swimming pools

Approval to lead the activity will be required via EVOLVE.

Establishments must ensure they liaise with the Educational Visits Adviser before any visit is planned for hotel (and other) swimming pools which not maintained by the local authority.

Establishments should check the lifeguarding position in advance.

PLEASE READ EDSENTIAL SWIMMING POOL CHECK LIST BEFORE ANY VISIT WHERE A SWIMMING POOL IS USED, IS PLANNED.

For free swimming activity

- A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see www.lifesavers.org.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**
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement (available from 2012) see www.lifesavers.org.uk

Normal Operating Procedures and the Emergency Plan for the pool should be considered before swimming takes place. Full familiarisation of the systems should be walked through at the pool.

Staff must be aware of the procedures in the event of an emergency and who will provide back up at the venue. 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 LA Establishment's staff.

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

Edsential 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, 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, see www.lifesavers.org.uk Note: this is for beach/sea only and not inland water.

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**
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement (available from 2013) see www.lifesavers.org.uk.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

21. Definition of an 'adventurous activity'

Please contact Edsential if there is uncertainty over whether a particular activity requires approval.

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

- All activities in open country (see below).
- Swimming (all forms, except as part of the Edsential Primary & Secondary School Swimming Programme).
- Water margin activities including pond/stream dipping [Group Safety at Water Margins](#)
- Rafting or improvised rafting
- Use of powered safety / rescue craft
- All other forms of boating (excluding commercial transport)
- All forms of water sports including improvised rafting
- Water skiing
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including climbing walls), Abseiling
- Mountain Biking
- Coasteering / coastal scrambling / sea level traversing
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- River / gorge walking or scrambling
- Camping
- Underground Exploration
- Air activities (excluding commercial flights).
- Horse riding.
- Motor sports- all forms
- Shooting and archery
- Theme Parks- where there is a range of water rides
- Off road cycling
- High level ropes courses AND Zip wires
- Trampolining and Trampoline Parks
- Zorbing
- Paintballing
- Adventure Playgrounds / trails i.e Manley Mere, Crocky trail
- Any activity where the provider has to sign a waiver form.
- Other activities (e.g initiative exercises) involving skills inherent in any of the above.

Currently Edsential do not approve the following Activities:

- **Zorbing**
- **Paintballing**
- **Visits to the Crocky Trail, Manley Mere trail and water park**

- **Inflatable Parks including water**

For the purposes of Edsential and LA approval, the following activities are not regarded as adventurous and therefore do not require approval from us. 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 of Establishment is competent to supervise the activity:

These are examples only:

- Walking in parks or non-remote country paths
- Bowling
- Chester Zoo
- Laser Quest
- Swimming – as part of the Edsential Primary & Secondary School Swimming Programme
- Pedal go-karts
- Ice skating (rink)
- Local traffic survey
- Museum, library, etc
- Physical Education and sports fixtures (other than in the above list)
- Football stadiums
- Theme Parks where there are no water rides

22. Adventurous Activities

This section is applicable to all adventurous activities except the following four activities. Separate guidance applies for these four activities:

Water-based activities - Section 23

Open country activities - Section 24

Snowsports - Section 25

Overseas expeditions - Section 26

Edsential 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 all reasonably practicable safety precautions.

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

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

Edsential strongly recommends that schools use providers who hold an LOtC Quality Badge. Alternatively, a Provider Form may be completed on Evolve for consideration. Where appropriate to the activities, an AALA licence should also be held.

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

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

or

b) *A member of your Establishment's staff - see Section 28* This person must be specifically approved by Edsential to lead the activity via EVOLVE.

23. Water-Based Activities

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

Edsential 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.

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

The following are not regarded as adventurous activities for the purposes of LA and Edsential approval:

- Swimming in publicly lifeguarded pools - see [Section 20](#)
- Water-margin activities as defined in [Section 16](#)
- Commercial craft, tourist boat trips and similar activities for which young people would not normally wear personal buoyancy.

Except for the above, all other forms of water-based activities are regarded as adventurous activities, and as such require Edsential and LA approval.

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

a) **An external provider** - see [Section 29](#)

The provider must hold a LOtC Quality Badge or complete a Provider Form

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

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

or

- b) **A member of your Establishment's staff** - see [Section 28](#)

This person must be specifically approved by Edsential and the LA 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 documented knowledge of the water conditions/hazards (and potential changes) that might be encountered and prepare accordingly. Local advice must be sought where appropriate, e.g. coastguard, harbour master and other site users.

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

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

24. Open-Country Activities

Open-country activities are regarded as 'adventurous' and therefore these visits require Edsential and LA approval.

Edsential 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.

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

For the purposes of Edsential and LA approval, 'open-country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact Edsentials' LOfC, Evolve and Educational Visits Team if you think this might apply.

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 a LOfC Quality Badge or complete a Provider Form

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

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

or

b) **A member of your Establishment's staff** - see below

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

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

a) **For leaders of walking groups outside the UK or Ireland please contact the LA for further guidance.**

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

- Mountain Leader Award (Summer or Winter as appropriate) www.mltuk.org *or*

- A written statement of competence by an appropriate technical adviser - see [Section 28](#)

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

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

- Walking Group Leader Award www.mltuk.org *or*

- A written statement of competence by an appropriate technical adviser - see [Section 28](#)

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

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

– Countryside Leader Award. See www.countrysideleaderaward.org

– Sports Leaders UK Level 2 Award in Basic Expedition Leadership (BEL). See www.bst.org.uk

– Completion of a suitable 'Leader Training' Course.

– A written statement of competence by an appropriate technical adviser see [Section 28](#)

– Evidence of recent and relevant experience which has been appropriately corroborated.

– An assessment of competence (written or implied) by the Head of Establishment

25. Snowsports

Edsential acknowledges the immense educational benefits that snowsport activities can potentially bring to young people and fully supports and encourages snowsport activities 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.

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities and the visit therefore requires Edsential and LA approval.

There are advantages to snowsports taking place during term time as opposed to during the Establishment holiday period. These include greater choice generally, less queueing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snowsport Establishment instructors (as opposed to 'casual' instructors), greater likelihood of English-speaking instructors and considerable cost savings through avoiding high season (possibly allowing more young people to participate).

A member of staff intending to organise a snowsport visit (but not instruct, lead or supervise on snow) must hold the Snowsport Course Organiser Award (SCO), administered by Snowsport England www.snowsportengland.org.uk and must have previously accompanied at least one educational snowsports visit.

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

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

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

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

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

- a) The pupils are under the direction of a suitably qualified local instructor
- b) They remain within the designated controlled areas
- c) Insurance covers them to do so

26. Overseas Expeditions

Edsential acknowledges the immense educational benefits that overseas expeditions can potentially bring to young people and fully supports and encourages overseas expeditions that are correctly planned, managed, and conducted. We strongly recommend that an LOtC accredited provider is used for overseas trips.

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

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 Establishments may therefore need to allow up to 18 months for Edsential and LA approval to be granted. A 'Note' (for the attention of the Edsential and the LA) should be added to the EVOLVE Visit Form as soon as possible during the planning stages. Overseas Expeditions will only be approved by Edsential and the local authority if the provider either:

- a) Holds an LOtC Quality Badge www.lotcqualitybadge.org.uk **or**
- b) Provides a statement of compliance with [*Guidance for Overseas Expeditions, Edition 3*](#)

For providers that do not hold a LOtC Quality Badge, 'Guidance for Overseas Expeditions, Edition 3' should be referred to when the proposal is initiated. This document contains information for both Establishments and providers and includes a checklist of vital aspects that **must** be considered prior to the Establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

When planning an expedition and selecting a provider, Establishments should particularly consider the educational aims of the venture, that appropriate progression takes place and that the requirements relating to 'Best Value' are met.

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

To complete the appropriate forms see Appendix 5. Refer to relevant section/s of [National Guidance](#) by using the search facility.

27. Emergency Procedures

Establishments should ensure that their Health and Safety policy includes off-site visits.

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

For visits that take place outside normal Establishment hours:

- A completed [Emergency Card – Visit Leader](#) (or equivalent) must be with the Visit Leader at all times, see appendix 2
- A completed [Emergency Card – Home Contacts](#) (or equivalent) must be with the emergency home contact(s) at all times, where access to EVOLVE is not possible. See appendix 3.

In an emergency, if it is not possible to reach any of the designated Establishment emergency contacts, the leader should call the LA 24-hour emergency number - see Appendix 7 contact form. Please ensure these numbers are checked against those on EVOLVE for they do frequently change.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

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 21](#), must 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), Edsential 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

Trips must be submitted to Edsential for approval via EVOLVE a minimum of 20 working days prior to the trip commencing. Overseas trips must be submitted a minimum of 6 weeks prior to the trip commencing. Late submissions MAY be considered at the discretion of Edsential and subject to an administration fee.

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 Edsential LOtC, Evolve and Educational Visits Team.

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

In cases where no National Governing Body exists, the Edsential LOtC, Evolve and Educational Visits Team will decide 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 always act 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 Edsential LOtC, Evolve and Educational Visits Team on the EVOLVE Visit Form.

Where there is insufficient information for the Edsential LOtC, Evolve and Educational Visits Team to make a decision regarding approval, then the applicant may be asked to provide further information (e.g., evidence of awards, experience, and logbook details, etc). In some cases, a meeting with the applicant may be requested by the Edsential LOtC, Evolve and Educational Visits Team.

Approval to lead an adventurous activity is specific to the technical aspects of the adventurous activity detailed. It is not an indication in respect of other aspects of the visit such as general management and supervision skills, the assessment of which may be the responsibility of Head of Establishment and/or EVC.

29. Guidelines for 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
- Freelance instructor of adventurous activities
- Youth Hostel only if activity instruction is provided
- Voluntary organisation (e.g., Scout Association), where instruction is provided
- Youth Hostel (where accommodation only is used)
- Campsite
- Farms
- Trampoline Park
- 'Volunteer' instructor of adventurous activities

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

- Hotel, B&B, etc.
- Museums, galleries, etc.
- Tourist attractions
- Theme Parks
- Coach, Train, or Airline company
- Swimming Pool
- Leisure/Sport Centre

The decision about the use of an external provider is the responsibility of the visit leader, EVC, Headteacher and Head of Establishment.

Schools/Establishments 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 schools/Establishment must ensure that either:

a) The Provider holds an LOtC Quality Badge www.lotcqualitybadge.org.uk

or

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

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

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

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

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

PROCEDURE:

- Download a [Provider Form](#) from EVOLVE.
- Complete the top section.
- Send Provider Form to the provider (email, fax, post).
- When the form has been returned check that it has been satisfactorily completed.
- Keep Provider Form on file together with all other relevant documentation.
- Attach the Provider Form to EVOLVE.

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

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

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

In some instances, for example where a school/Establishment intends to use an 'external', **voluntary** individual for services, then this person may be regarded as a temporary member of staff.

The above procedure is not sufficient for Overseas Expeditions (i.e., those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable. Please contact the Edsential LOTC, Evolve and Educational Visits Team.

For Further assistance with LOTC and EVOLVE please contact

Edsential LOTC Team

0151 355 2168

Jane.pepper@edsential.co.uk

