

Guidance for Educational Visits

2024/25



The Educational
Visits Specialists

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1 General

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

LINCOLNSHIRE COUNTY COUNCIL (the Lead Approver) acknowledges the immense value of off-site visits and related activities to young people, and fully supports and encourages those that are well planned and managed.

The Lead Approver adopts the OEAP's 'National Guidance' (NG): www.oeapng.info
References throughout this document hyperlink to specific documents within National Guidance.

In line with current good practice in over [28,000 educational establishments](#), the Lead Approver uses the robust web-based system 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits www.evolve.online. All staff that lead or accompany visits have their own EVOLVE account, which is set up by their school's Educational Visits Coordinator (EVC). As well as a planning tool for staff, 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.

The 'starting point' for this document echoes National Guidance, in that the key to effective and successful outdoor learning and off-site visits is: **the right leaders doing the right activities with the right young people in the right places at the right times.**

The Lead Approver has commissioned EVOLVE Advice to provide advice, guidance, and support to its schools.

Refer to National Guidance document 1.b [Foundations](#)

2 Responsibilities

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

Details about who the employer is can be found in National Guidance document [1c Status Remit and Rationale](#)

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](#)

3 Educational Visits Coordinator Training & Role

To help fulfil its health and safety obligations for visits and to comply with [DfE Guidance](#), schools are encouraged to 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.

Training provided by a reputable provider is acceptable (such as the courses provided by www.evolveadvice.co.uk). Training may be face-to-face or 'blended', i.e. part e-learning, part webinar – e-learning alone is not sufficient.

Thereafter, update EVC Training or a repeat full course is recommended on a 3 yearly basis.

The EVC should ensure that a record of their training is logged on EVOLVE, as all Visit Forms link to this.

The EVC (or an 'EVC Admin Support') user is responsible for setting up and disabling all EVOLVE accounts (a requirement under UK GDPR). This process is automated via a direct MIS link for schools that subscribe to [EVOLVE+](#) or [Premium EVOLVE](#).

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. This should be uploaded to EVOLVE resources.

Schools should ensure their trained EVCs are listed on the [EVC Register](#).

Refer to National Guidance [Educational Visits Coordinator](#)

4 Visit Leader Training & Role

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.

Visit Leader Training provided by any reputable training provider is acceptable.

Training may be face-to-face, 'blended', or via e-Learning, such as the courses provided by <https://www.evolveadvice.co.uk/vl-training>

5 Approval

Final approval is delegated to the Headteacher for all visits, with the exception of:

- Overseas visits
- Residential visits
- Adventurous activity visits

which require The Lead Approver approval. These visits should be submitted to the Lead Approver at least 4 weeks in advance.

In approving visits, the Head and EVC should ensure that the visit leader has been appropriately inducted/trained, and is competent to lead the visit, see [Section 11](#)

What does 'Visit Approved by the Lead Approver' mean?

When the Headteacher authorises a visit on EVOLVE, they are confirming that the visit complies with school and the Lead Approver policy, and that in their opinion the visit leader and any accompanying staff are competent to supervise the visit.

This task can only be the responsibility of the Headteacher/Senior Management, as the Lead Approver does not have first-hand knowledge of the intended participants or of the competence of the staff team in order to make this decision.

The Lead Approver therefore relies on the Headteacher to make an appropriate professional judgement prior to authorising visits, by taking all aspects into account, including but not limited to:

- The competence of the visit leader
- The competence of the accompanying staff
- The ages and level of maturity of pupils, including those with special needs
- The intended learning outcomes
- The proposed itinerary
- The contingency plans in place (eg. Plan B)

The Lead Approver assumes that the Headteacher would not submit the visit for LA approval if they were not satisfied with the intended arrangements.

Although all visits requiring the Lead Approver approval are viewed, it is not feasible for the Lead Approver to scrutinise in detail all information and attachments, and so this is undertaken on a 'sample' basis.

The exception to the above is where school staff lead adventurous activities themselves (ie. not using an external provider). In these instances it is unlikely that the Headteacher will have the necessary expertise to assess the technical competence of the activity leader, and therefore this task is carried out by the Lead Approver.

Refer to National Guidance document 1b [*Foundations*](#)

6 Outcomes

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

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.

Refer to National Guidance document 5.1c [Learning Outside and Off-site visits: self-evaluation using the Ofsted framework](#)

[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.

7 Inclusion

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

It is recommended that students have the opportunity to engage with visits in ways that affirm their identities. This guidance is based on best practice, and should be applied wherever possible, unless the legal context prohibits.

On overnight educational visits, children and young people should be allowed use of an overnight facility that aligns with their gender identity. Students should also have access to other facilities, such as restrooms and changing rooms, that align with their gender identity.

Transgender people may determine which facilities they feel safest and most comfortable using. Any person who is uncomfortable using a shared facility, regardless of the reason, should have access to a safe, practical, and non-stigmatizing alternative.

All students and parents/carers should be given the opportunity to express wishes around rooming on visits. Transgender students, in particular, should be consulted in the trip planning process, to address any potential concerns and needs for privacy. In all cases, student safety should be placed as a top priority.

If using home stays, students who have disclosed their LGBTQ+ status to the trip organizer should be placed in homes that have been assessed for the safety of these students. A student's gender or sexual identity should not be disclosed to home stay providers without the student's explicit consent.

Under no circumstances should an LGBTQ+ student be denied the opportunity to participate in overnight trips or other opportunities on the basis of their identity. The trip organisers should make all efforts to accommodate any student who desires greater privacy in overnight trips. If the context of a trip is inherently unsafe for LGBTQ+ people, it is recommended that the location or context be reconsidered to ensure safe travel for all participants.

Refer to National Guidance documents 3.2e [*Inclusion and 4-4I transgender-young-people-and-visits*](#)

8 Planning - Risk Management - What to Record and How?

Note: Risk management during visits is covered in [Section 9 – Safety During the Visit](#)

How much planning?

The extent of planning required is related to the complexity of the visit, see:

[EVOLVE Planning Chart \(pdf\)](#)

[EVOLVE Planning Chart \(video\)](#)

National Guidance document 4.3c [Risk Management – an overview](#)

Two levels of documentation: Generic/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 the Lead Approver guidance. They should ideally include a Local Area Visits policy (see below), 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. An example ‘Local Learning Area’ template for adaptation can be found in EVOLVE/Resources/ Forms.

Activities in the Local Learning Area should be recorded either via the EVOLVE Local Visits module (if activated), or via a ‘Signing Out’ sheet left with the school office before departure. See ‘Example signing-out sheet’ in EVOLVE/Resources/Forms.

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.

It is recommended that where a school has designated its own Local Learning Area, a copy of the adapted document is uploaded to EVOLVE/Resources/ Establishment Docs for staff reference.

The remainder of the section relates to activities outside the

Local Visits 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 Planning 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?

It is recommended that all visits are recorded on EVOLVE, as this reduces bureaucracy, ensures that a robust audit trail exists, and helps evidence learning outcomes.

EVOLVE provides a means of recording and sharing visit planning, and enables the EVC and Headteacher to contribute to, support, and monitor the activity.

'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 traditional completed template/form (uploaded to EVOLVE)
- A mind-map or annotated illustrations (photographed and uploaded to EVOLVE)
- Handwritten notes (photographed or scanned and uploaded to EVOLVE)
- Audio or video files, e.g. of a staff meeting (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, eg. 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 31](#)). 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. See 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.

Refer to the [STAGED approach booklet](#) to support the planning

Refer to National Guidance documents:

4.3c [Risk Management – an overview](#)

4.3g [What to Record and How](#)

4.3c [Risk Management – some practical advice for leaders](#)

9 Safety During the Visit/Ongoing Risk Assessment

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 on-going 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](#)

10 Parent/Carer Consent

Schools:

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.

Written consent is usually only required for activities that need a higher level of risk management or those that take place outside school hours. Parents must be informed of these activities in advance, and given the opportunity to withdraw their child from any particular visit or activity covered by the form.

The school must have a robust means of ensuring that changes to parent/carers contact details and child medical details are up-to-date.

Electronic consent (e-consent), via EVOLVE is recommended as this is a more robust alternative to paper-based consent forms. Other e-consent, such as via Parent Pay is acceptable provided the consent links directly to parental information.

Other establishments:

Annual consent is appropriate for regular routine activities.

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

All: Refer to National Guidance document 4.3d [*Parental Consent*](#)

11 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).
- b) Has the leader completed a Visit Leader Training course? (see [Section 3](#))
- c) Is the leader competent in planning and managing visits?
- d) What are the leader's reasons for undertaking the visit?
- e) Is the leader an employee of the Lead Approver/trust/school?
- f) Does the leader have the ability to manage the pastoral welfare of participants?
- g) Does the leader exhibit sound decision-making abilities?
- h) What experience has the leader of the participants they intend to supervise?
- i) What experience has the leader of the environment and geographical area chosen?
- j) Does the leader possess appropriate qualifications?
- k) If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- l) If leading adventurous activities, has this been 'approved' by the Lead Approver?
- m) Is the leader aware of all relevant guidelines and able to comply with these?

Refer to National Guidance document 3.2d [Approval of leaders](#)

12 Staffing and Supervision

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

The [Statutory Framework for the Early Years Foundation Stage](#) no longer differentiates between outings and on-site 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 either 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.

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 university open day.

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

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

- prior knowledge of the individuals (including their maturity and levels of responsibility);
- venue and conditions;
- the activity 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*](#)

13 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 should be carried.

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

edSAFETY has developed a [3 hour First Aid for Educational Visits](#) course to aid for low level visits.

Refer to National Guidance document 4.4b [First Aid](#)

Refer to: [Statutory Framework for the Early Years Foundation Stage](#)

14 Insurance

Advice regarding insurance may be sought from the Lead Approver's Insurance section.

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). See www.dh.gov.uk

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

15 Travel

ALL

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 Lead Approver 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 Lead Approver 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 (e.g. Bridges, Zebra, Pelican...)?
- If no formal point available, consider the 'Wave' approach (see below for operational practice)
- 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.

16 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 7g [*Farm Visits*](#)

17 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 as a water-based adventurous activity needing the Lead Approver approval, and [Section 24](#) 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 other competent person.

Refer to National Guidance document 7i [Group Safety at Water Margins](#)

18 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](#)

19 Overseas Visits

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 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 27](#)

20 Weather, Clothing & 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;
- Torch;

- Possible need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas);

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

21 Swimming

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. 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)

Employer Approval is not required

- 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, the Lead Approver 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:

7x [Swimming pools](#)

 8.1r Swimming Pool Provider Statement

Hotel (and other) swimming pools

Schools should check the lifeguarding position in advance.

Employer Approval is not required for this activity.

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

The following awards/qualifications apply:

For free swimming activity

- A valid 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.

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.

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

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

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

Refer to National Guidance document 7x [Swimming pools](#)

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

Employer 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, not inland water. *or*

For structured or programmed activity

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

Refer to National Guidance document 7o [*Natural Water Bathing*](#)

22 Definition of an 'adventurous activity'

The following activities are typically regarded as 'adventurous':

- All activities in 'open country' (see below)
- Air activities (excluding commercial flights)
- Abseiling
- All forms of boating (excluding commercial transport)
- Aqua Park
- Camping
- Canoeing/kayaking/Stand up paddleboarding
- Coasteering/coastal scrambling/sea level traversing
- 'Extreme' sports
- High level ropes courses
- Hill walking and Mountaineering
- Horse riding
- Motor sport – all forms
- Off road cycling
- Rafting or improvised rafting
- River/gorge walking or scrambling
- Rock climbing (including indoor climbing walls)
- Sailing/windsurfing/kite surfing
- Swimming (all forms, excluding publicly lifeguarded pools)
- Shooting/archery/paintballing
- Snorkel and aqualung activities
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Trampoline Parks (see [Section 28](#))
- Underground exploration
- Use of powered safety/rescue craft
- Water skiing
- Other activities (e.g. initiative exercises) involving skills inherent in any of the above

'Open country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the the Lead Approver if you think this might apply. For level of competence required to lead in open country see [Section 25](#)

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.
- Physical Education and sports fixtures (other than the above)
- Water-margin activities as defined in [Section 17](#)

23 Adventurous Activities

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

[Water-based activities](#) - Section 24

[Open country activities](#) - Section 25

[Snowsports](#) - Section 26

[Overseas expeditions](#) - Section 27

[Trampoline Parks](#) - Section 28

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 31](#)

The provider must hold an [LOtC Quality Badge](#) or complete a [Provider Statement](#). *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 30](#)

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

24 Water-Based Activities

For clarification between water-margin and water-based activities see [Section 17](#)

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 this guidance:

- Swimming in publicly lifeguarded pools - see [Section 21](#)
- Water-margin activities as defined in [Section 17](#)
- 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 31](#)

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 30](#)

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.

25 Open-country activities

For the purposes of Employer 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 Lead Approver 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 31](#)
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) www.mltuk.org
- b) For leaders of walking groups in mountainous terrain within the UK and Ireland
- Mountain Leader Award (ML) Summer or Winter as appropriate
www.mltuk.org *or*
- A written statement of competence by an appropriate technical adviser - see [Section 30](#)
- 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) www.mltuk.org *or*
- A written statement of competence by an appropriate technical adviser - see [Section 30](#)
- 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) www.mltuk.org
 - [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 30](#)
- Evidence of recent, relevant experience, appropriately corroborated.
- An assessment of competence (written or implied) by the Headteacher.

26 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 <http://www.evolveadvice.co.uk/svt; or>
- 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 30](#)

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

- The Alpine Ski Course Leader Award (ASCL) www.snowsportengland.org.uk *or*
- The Alpine Ski Leader Award (ASL) www.snowsportscotland.org *or*
- A statement of competence by an appropriate 'technical adviser' - see [Section 30](#)

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

- The Snowboard Leader Award (SBL) administered www.snowsportscotland.org *or*
- A statement of competence by an appropriate 'technical adviser' - see [Section 30](#)

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

Refer to National Guidance document 7.v [Snowsport visits](#)

27 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 the Lead Approver 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*](#)

28 Trampoline Parks

This section 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.

Schools should follow National Guidance document 7d [*Trampoline Parks*](#)

'Trampoline Parks' is classified as an adventurous activity and should therefore be entered on EVOLVE. However, the final approval has been set at Head level upon confirmation of compliance with the above National Guidance document.

Aqua Parks

'Aqua Parks' is classified as an adventurous activity and should therefore be entered on EVOLVE. However, the final approval has been set at Head level upon confirmation that the provider is an RLSS approved aqua park - <https://www.rlss.org.uk/Listing/Category/aqua-parks>.

Refer to NG [*7.1z Visitor attractions*](#)

29 Emergency Procedures

Schools 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 school's policy on emergency procedures.

In the event of an emergency, schools should either use the [EVOLVEgo](#) app, or use other means of recording events and information.

If not using the [EVOLVEgo](#) app, for visits that take place outside normal school hours:

- A completed [Emergency Card – Visit Leader](#) (or equivalent) must be with the Visit Leader at all times, *and*
- 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.

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

EVOLVE Advice have produced pocket emergency guides as part of their TOOLS FOR SCHOOLS® which can be purchased at

<https://www.evolveadvice.co.uk/toolsforschools>

Refer to National Guidance Documents: 4.1b [Emergencies and critical incidents](#)
- and other NG documents in Section 4.1

TRAINING

The e-learning [Preventing incidents and managing emergencies](#) course (provided by EVOLVE Advice) is particularly recommended for all those involved in off-site activities.

See <https://www.evolveadvice.co.uk/courses>

30 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 22](#), 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 see National Guidance document 6h [Adventure Activity Qualifications](#)

31 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 30](#) 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 LOfC Quality Badge www.lotcqualitybadge.org.uk or www.kaddi.com

or

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

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

Procedure for Providers that hold an LOfC 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 LOfC 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 30](#) may be appropriate.

See National Guidance documents:

4.4h [Using external providers](#)

6a FAQ [Asking for a provider's risk assessments](#)

Contacts

EVOLVE Access	www.evolve.online
Educational Visits Advisers	EVOLVE Advice advice@evolveadvice.co.uk
EVOLVE Support	EVOLVE Advice support@evolveadvice.co.uk

EVOLVE www.evolve.online

EVOLVE Advice App www.evolveadvice.co.uk/app

Kaddi Provider Database www.kaddi.com

National Guidance www.oeapng.info

National Library www.national-library.info

LOtC Quality Badge www.lotcqualitybadge.org.uk

Council for Learning
Outside the Classroom www.clotc.org.uk

Foreign & Commonwealth
Development Office www.fco.gov.uk

Training Courses

EVC, Visit Leader, Visit Emergencies, & EVOLVE Training –

www.evolveadvice.co.uk/courses

First Aid & Health and Safety Training – <http://www.edsafety.co.uk/training>

Useful Documents

1. Provider form – <https://oeapng.info/downloads/download-info/8q-provider-statement-word-version>
2. Private Car form - <https://www.evolveadvice.co.uk/s/14-Private-Car-Form.pdf>
3. Self Evaluation & the Ofsted Framework - <https://oeapng.info/downloads/download-info/5-1c-rigorous-evaluation-of-lotc-meeting-ofsted-expectations>
4. Model Field Monitoring Form - <https://oeapng.info/downloads/download-info/8-1c-model-field-monitoring-form-print-version-word>
5. Local Learning Area Template - <https://www.evolveadvice.co.uk/s/Local-Learning-Area-Template-2022.docx>
6. Model Code of Conduct - <https://oeapng.info/downloads/download-info/8i-model-code-of-conduct>
7. STAGED Booklet - <https://www.evolveadvice.co.uk/staged>