



L.E.A.D. Academy Trust  
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## **Policy and Guidance for Offsite / Educational Visits and Related Activities**

### **Uplands Junior L.E.A.D. Academy**



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Nominated Advisory Service Provided By:



Document Owner:



Policy Approved By:	
Approving person or body	
Date of Approval	

## Quick Reference

## Flowchart

Note - Residential, overseas and adventurous activities require Trust approval – Submit via Evolve **4 weeks** prior to departure

## START

Will an External Provider, Activity Centre or Tour Operator be used?

NO

YES

Does the provider hold an LQTC Quality Badge?  
[www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

NO

YES

Email a OV2 'Provider Form' to the provider. Retain completed unmodified form at your establishment and attach a copy to the EVOLVE application- see [Section 18](#) of L.E.A.D. Policy

Will a member of your establishment's staff be leading an adventurous activity as defined in [Section 30](#)?

YES

The member of staff must be specifically approved by L.E.A.D. to lead the activity. Leader Approval must be obtained via EVOLVE - see [Section 32](#)

NO

Will the visit be residential, overseas, or involve an adventurous activity as defined in [Section 30](#)?

YES

NO

Has the Visit Leader been assessed as competent to lead the visit, and is he/she able to comply with the [Visit Leader Checklist](#)?

YES

YES

Has the visit been approved by the EVC and Head of Establishment?  
If applicable, has Governing Body policy been complied with?  
If Category 'A' or 'B' If category 'C' – Adventurous activity, residential or overseas visit

YES

YES

### Approval is delegated to the Head of Establishment

This would normally be via EVOLVE, unless operating under standard operating policies or procedures for simple, local low risk activities  
If approved by Head/Manager:

### The visit must also be approved by L.E.A.D.

Submit visit to L.E.A.D. via EVOLVE

If approved:

Establishment should monitor visits on a 'sample' basis

## THE VISIT MAY PROCEED

Assess risks on an on-going basis and implement appropriate control measures

Evaluate the visit via EVOLVE

## EVOLVE Visit Flowchart

Note: This process is automatically followed when using EVOLVE

This statement sets out the legal framework, the definitions and our policy expectations.

L.E.A.D. Academy Trust requires this model policy to be implemented by all its member academies. Where appropriate, local arrangements for our academy have been inserted into this policy.

The purpose of this policy is to set out clearly the procedures for ensuring safety on the various categories of off-site educational visit.

We aim to use off-site educational experiences to enhance the learning process across the whole curriculum. We see it as an approach which is essentially cross-curricular and it will in many cases form the basis (first-hand experience) from which further studies are made.

Outdoor education and educational visits contribute to:

- The promotion of a positive response towards personal health, safety and well being
- The gaining of a greater understanding and appreciation of the wider world and contextualisation of learning
- An awareness of the need for sustainable relationships between people and the environment
- The fostering of the growth of self-esteem, co-operation with others and personal responsibility.

L.E.A.D. Academy Trust (known hereafter as the Trust) defines the policy expectation, but the responsibility for implementation of the policy rests with the Headteacher of each academy.

**Cross Reference:** Health and Safety Policy; Child Protection and Safeguarding Policy; Supporting Pupils with Medical Conditions Policy.

## **Responsibilities**

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

For L.E.A.D. Academy Trust academies, the employer is the MAT.

The Trust requires its academies to follow this guidance.

All persons involved in a visit have a specific responsibility which they must be clear about prior to the visit taking place.

Refer to: 'Planning Basics' and 'Checklists' in National Guidance [www.oeapng.info](http://www.oeapng.info)

As the employer, Trust is required to ensure that its employees are provided with:

- appropriate guidance relating to off-site visits;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training. Expectations are set by current good practice.

Appropriate members of the Trust must take part in relevant training that prepares them for the responsibilities they hold for the management of Learning Outside the Classroom/Offsite Visits and Activities. A record of training must be kept by the EVC.

The relevant training courses for the Trust employees are:

- Educational Visit Coordinator (EVC) Training – Academies must each have an EVC.
- EVC Revalidation – Academies are required to ensure that their EVC undertakes a formal revalidation every three years.
- Visit Leader Training (VLT) - Before planning a visit, Visit Leaders must be given appropriate training which is proportionate to the experience of the Visit Leader and nature of the trip.

Revalidation of VLT is not currently required. However, to meet OEAP NG requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice. Regular monitoring of visits may also flag a need for further training.

If an employee experiences a problem finding appropriate information, requires clarification or further help and guidance, they should contact their EVC who will be supported by specialist advisors nominated by the Trust.

The Trust acknowledges the immense value of offsite visits and related activities to young people, and fully supports and encourages those that are well planned and managed. To support academies in the planning and operation of well-managed, safe and effective educational visits, the Trust has adopted the Educational Visits Advisers' Panel 'National Guidance' ([www.oeapng.info](http://www.oeapng.info)). Reference is made to National Guidance throughout this document.

In order to provide competent support to academies in the planning of educational visits, the Trust has contracted with EVOLVE Advice Ltd to fulfil the role of Nominated Advisers.

The Trust uses the web-based system, EVOLVE, to facilitate the efficient planning, management, approval, and evaluation of visits. All staff who lead or accompany visits can access their own EVOLVE account, which is set up by their establishment's Educational Visits Coordinator (EVC). As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including: search and report facilities, downloadable resources, a link to the National Library [www.national-library.info](http://www.national-library.info), staff records and visit history, on-line parental consent, etc.

EVOLVE must be used for all residential, overseas and adventurous visits, and is recommended for all visits – see Section 6 **Approval and Notification of Activities and Visits** and Section 19 **Planning**.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP National Guidance document [Underpinning Legal Framework](#).

Visits requiring Trust approval (Category C) should normally be submitted at least 4 weeks prior to departure to allow for the possibility that the form is returned for clarifications or for arrangements to be amended. Failure to do so may mean that there is insufficient notice to grant approval. Visits submitted within 1 week of departure will be 'processed' instead of approved. In this instance, if the visit proceeds it must be understood that this is without the approval of the Trust and the Head/Manager accepts full responsibility for providing approval. Processing the visit allows for accurate reporting and trend analysis by the Trust.

Should academies feel it necessary to include any additional local arrangements specific to their academy, please consider running the proposed additions past the central Trust first.

## 1. Provision of Employer Guidance

The national online guidance resource [OEAP National Guidance \(Guidance for the Management of Off-site visits and LOtC \(Learning Outside the Classroom\) activities\)](http://oeapng.info/) is an invaluable reference document, which should be read alongside this policy. It is available from:

<http://oeapng.info/>

If information in this policy is in variance to the advice in **OEAP National Guidance (NG)**, the advice in this Policy should be followed. If managers or visit leaders require further information or advice they should contact the Educational Visits Adviser, Andrew Smith

For HELP with EVOLVE general queries, logins, etc: EVCs or HEADS (only) may email: [support@evolveadvice.co.uk](mailto:support@evolveadvice.co.uk)

For HELP with ADVICE queries regarding visits: EVCs or HEADS (only) may email: [advice@evolveadvice.co.uk](mailto:advice@evolveadvice.co.uk)

It is a legal expectation that employees **must** work within the requirements their employer's guidance; therefore, employees must follow the requirements of "OEAP National Guidance", as well as the requirements of this Policy.

Where a Trust employee commissions outdoor learning activity, they must ensure that such a commissioned agent has either:

1. adopted L.E.A.D. Academy Trust Guidance

or

2. have systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

## 2. Scope and Remit

The scope and remit of this document follows the outline presented in the OEAP National Guidance document ([Status Remit and Rationale](#)) and applies to most situations where adults acting in the course of their employment take responsibility for children and young people taking part in off-site activities and visits, as well as when taking part in on-site outdoor activities.

The common element to the above is 'being outdoors', either on-site or off-site or on the journey away to new environments, away from the usual indoor base.

The following terms may all be used to capture this range of ventures, experiences and environments:

- Off-Site Visits
- Outdoor Learning
- Learning Outside the Classroom (LOtC) and
- Educational Visits

For the purposes of this guidance, we use the definition:

"Any occasion when a young person takes part in a structured and employee-led learning activity which is carried out beyond the boundary of the normal operational base, but **excepting** the following:

- Where establishments operate on a split site
- Work experience placements
- **Physical Education:** only the journey to and from the venue is covered by this guidance. The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the employer and Association for Physical Education (AfPE).”

## Employees

As outlined in the OEAP NG, this guidance will apply to all staff, who

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom (LOtC)
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base

(with the exceptions of split-site working, work experience and PE as outlined above), you must ensure the young people are supervised in accordance with the contents of this guidance, regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

## Responsibilities

The Health and Safety at Work Act 1974 places overall responsibility for health and safety on off-site visits with the employer the Trust.

– For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP National Guidance document: [Requirements & Recommendations for Employers](#) (Legal framework and employer systems).

All persons involved in a visit have a specific responsibility, which they must be clear about prior to the visit taking place.

## Role-specific Requirements and Recommendations

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles found within management structures. These are:

1. [Employers Guidance](#)
2. [Line Manager of an Educational Visits Adviser \(or equivalent post\)](#)
3. [Educational Visits Adviser](#)
4. [Teacher Adviser \(other than an OEA\) and Health and Safety Co-ordinator](#)
5. [Manager of an Outdoor Centre or LOtC Facility](#)

Refer to individual OEAP National Guidance documents headed as above.

OEAP National Guidance also sets out clear and detailed responsibilities, functions and inter dependencies for specific roles found within most **schools and other child settings** ([see link](#)). These are:

1. [Member of Board of Governors or Management Board](#)
2. [Headteacher/Manager](#)
3. [EVC \(For L.E.A.D. Establishments refer to Educational Visits Co-ordinators \(EVCs\) as Off-site Visit Co-ordinators \(EVCs\)\)](#)
4. [Visit or Activity Leader](#)

5. [Assistant Visit leader](#)
6. [Volunteer Adult Helper](#)
7. [Those in a position of Parental Authority](#)

Refer to the following responsibility checklists:

- **OEAP National Guidance** checklists: [Visit Leader](#), [EVC](#), [Head/Manager](#), [Parent/Guardian](#), [Management/Governor](#)
- **OEAP National Guidance** document: [Planning Basics](#)
- **OEAP National Guidance** PowerPoint: [Planning Visits, Off-site Activity and LOtC](#)

### 3. Ensuring Understanding of Basic Requirements

As an employer, the Trust is required to ensure that its employees are provided with

- appropriate guidance relating to Off-site visits and Outdoor Learning activity;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed Advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The **appropriate guidance** for the management of outdoor learning and LOtC in the Trust is this Policy document and the OEAP National Guidance web site.

The **relevant training courses** in support of delivering this policy in the Trust are:

1. **Off-site/Educational Visit Coordinator (EVC) Training - all L.E.A.D. establishments are required to have a current, L.E.A.D. trained EVC in post.**

To help fulfil its health and safety obligations for off-site visits, the academy has appointed an Educational Visits Coordinator (EVC) who will support the Headteacher.

The appointed EVC for this academy is Mrs Terina Wood

The EVC is specifically competent, and has practical experience in leading and managing a range of visits similar to those typically run by the academy. Normally, but not exclusively, such competence will be identified in a person on the senior management of the academy. The EVC should be given suitable and sufficient information, instruction, training and time to fulfil the role effectively. A key role of the EVC is to assess the competence of staff to lead visits. If the EVC does not have the professional background and competence for this task it will be the responsibility of the Head/ Head of Service/Manager to fulfil this role.

2. **Off-site/Educational Visit Coordinator (EVC) Update Revalidation - all L.E.A.D. academies are required to ensure that their EVC undertakes a formal revalidation from time to time, the recommend period being every 3 years.**
3. **Visit Leader Training – this course is strongly recommended for all those who lead Outdoor Learning activities. Currently there is no revalidation requirement. However, to meet Outdoor**



Learning guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice, so update refresher training is strongly recommended.

For the purposes of day-to-day **updating of information**, EVCs and Visit / Activity Leaders are directed to the news articles on EVOLVE, the posting of Newsletters (which include information on how to access the relevant courses) and <https://edvisitshub.com>

Where an employee experiences problems with finding the material they are looking for, or require clarification or further **help and guidance**, they should contact the Educational Visits Coordinator (EVC) in the first instance, or the **Adviser nominated by the Trust**.

**The nominated Adviser for the Trust is:**

**Andrew Smith**  
**Educational Visits Adviser**  
**Telephone: Tel 07932 450914**  
**E-mail: [advice@evolveadvice.co.uk](mailto:advice@evolveadvice.co.uk)**

#### **4. Approval and Notification of Activities and Visits**

The Trust uses an online system for notification and approval called EVOLVE. A key feature of this system is that Off-site visits and Outdoor Learning activities requiring approval are automatically brought to the attention of the Trust. Those visits and activities not requiring approval may be viewed, sampled or monitored using the database and diary facilities of the system.

All staff that lead or accompany visits can access their own EVOLVE account, which is set up by their Educational Visits Coordinator (EVC).

##### **Approval**

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

Approval is normally delegated to the Head Teacher for all visits, except for the following visit types:

- **overseas**
- **residential**
- those involving an **adventurous activity** as defined in [Section 30](#)

The above three types (Category C) are 'authorised' within the academy, but are 'approved' by The Trust via EVOLVE. These visits must be planned and submitted using EVOLVE. It is recommended that other visits (classified as "None of the above" on EVOLVE, or Category B) are also planned and approved on EVOLVE (See [Planning](#) Section 9). Some examples of Category 'B' and 'C' visits are given in Figure 1, with some further definitions of 'adventurous activities' given in Figure 2. See also section 24, Definition of an Adventurous Activity and section 25, Adventurous Activities.

In approving visits, the Head Teacher and EVC must ensure that the visit leader has been appropriately inducted/trained, and is competent to lead the visit, see [Section 12](#)

A member of staff intending to supervise or instruct an adventurous activity, as defined in [Section 30](#) must be specifically approved by L.E.A.D. to do so, see [Section 32](#)

What does 'Visit Approved by Trust Adviser' mean?

When the Headteacher authorises a visit on EVOLVE, they confirm that the visit complies with school and employer 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 Adviser does not have first-hand knowledge of the intended participants or the competence of the staff team to make this decision.

The Adviser 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, level of maturity of pupils, including those with special needs
- The intended learning outcomes
- The proposed itinerary
- The contingency plans (Plan B) in place

The Adviser works on the basis that the Headteacher should not submit the visit for approval if he/she is not satisfied with the intended arrangements. 'Approved by Trust Adviser' therefore confirms that the school appears to have followed the employers stated procedures, based on the information provided and scrutinised.

## Notification

Heads Teachers and EVC's should establish timescales for submission of visits that allow time for proper scrutiny – and for any necessary modifications to be made. Some flexibility may have to be allowed for contingencies but a culture of late submission of visits should not be permitted as it tends to result in poor planning. Generally, the lead in period should be proportional to the complexity and nature of the visit – so for example residential and overseas visits normally require a longer 'lead -in' period.

**Visits requiring Trust Approval should normally be submitted via EVOLVE at least 4 weeks** prior to departure to allow for the possibility that the form is returned for clarifications or for arrangements to be amended. Failure to do so may mean that the Trust has insufficient notice to grant approval, resulting in the visit being 'processed without approval' instead. Visits submitted within 1 week of departure will be 'processed' instead of approved. In this instance, if the visit proceeds it must be understood that this is without the approval of the Trust and the Head/Manager accepts full responsibility for providing approval. Processing the visit allows for accurate reporting and trend analysis by the Trust.

The Trust aims to process forms within 10 working days – but remember the form may be returned with queries or comments that require amendments and resubmission prior to approval.

Where a contract is to be signed and a deposit paid, the application must be submitted with an outline plan before a commitment is made in case of any major issues. In some cases, this may mean a visit form is initially submitted 12 to 18 months prior to proposed departure. Further details can be added at a later stage.

## 5. Risk Management

As the employer, the Trust has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level as far as is reasonable practicable. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring the Trust to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. The Trust strongly recommends a "Risk-Benefit Assessment" approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes, see section on **Outcomes and Benefits**. This appreciation of the benefits to be gained through participating provides objectivity to a decision that the residual risk (i.e. the risk remaining after control measures have been put in place) may be "acceptable". HSE endorse this approach through their "**Principles of Sensible Risk Management**" and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal requirement for the Trust to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. Academies are directed towards the electronic portfolio of example generic risk assessment templates which are reviewed annually (August/September). **These risk management materials can also be accessed through the Resources Section at the following web link to the EVOLVE system:**

<https://evolve.edufocus.co.uk> and select LEAD Academy Trust from the drop down.

**It is strongly recommended that establishments adopt and adapt these materials. On completing any risk assessments, the establishment should ensure that the documents are signed (physically or digitally) and dated. The risk assessments must be shared with the visit team (including, where appropriate, volunteers) and relevant information communicated to young people.**

Visits that include adventurous activity commonly involve delivery by an external provider (see Section 18) and the **provider** will have responsibility for risk assessing and managing the activity. As such, the providers' risk assessment does not need to be requested from the provider, and **does not need to be attached to EVOLVE.**

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

Refer to **OEAP National Guidance** document: Risk Management – [What to record and how](#)

Refer to **OEAP National Guidance** document: [Planning Basics](#) for outdoor learning

Refer to **OEAP National Guidance** document: Risk Management – [Some practical advice for leaders](#)

Refer to **OEAP National Guidance** document: [Risk Management Good Practice](#)

Refer to **OEAP National Guidance** document: Organising a Residential Visit – Mind Map

Refer to **L.E.A.D. Generic Risk Assessments** found in the Resources section of **EVOLVE**

## **6. Emergency Planning and Critical Incident Support**

A critical incident is an incident where any member of a group undertaking an off-site activity has:

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

**Preparation** and practice drills for emergencies are crucial, refer to OEAP National Guidance document:

[Emergencies and Critical Incidents](#)

Emergency contact telephone numbers should be carried by leaders at all times during an off-site activity, but should only be used in the case of a genuine emergency. Under no circumstances should these numbers be given to young people or to their parents or guardians

**In the event of an emergency**, The academy should refer to their own academy emergency plan initially.

The Trust should be notified as soon as practically possible by contacting the below:

**Bobby Thandi (07815 206 278)**  
**Neil Spencelayh (07710 391 272)**

To activate support from the Educational Visits Adviser during school opening hours, the following telephone number should be used:

**Andrew Smith (Educational Visits Adviser) on [advice@evolveadvice.co.uk](mailto:advice@evolveadvice.co.uk) or 07932 450914**

**After:** An investigation should be completed (including the expertise of the Health and Safety Business Partner and Educational Visits Adviser) and recorded on EVOLVE, with findings shared with appropriate parties.

The Trust's insurance provider (The RPA) should be informed, if necessary.

## How to Notify Incidents

### Urgent Incidents

For urgent incidents please call 03300 585566, a sample of what an urgent incident could be is listed below:

Significant damage / or loss of property where operations are significantly affected

- Major injuries
- Serious assaults
- Fatality
- Allegations or knowledge of abuse
- Pollution incidents
- Media involvement
- If you are in doubt whether something is serious

They will have professionals on hand to deal with emergencies. If such an event occurs then please dial their main contact number above, the facility provides for 24/7/365 coverage.

### Overseas Emergency

Overseas Travel Emergency Helpline Card Below is an Emergency Helpline card. You may wish to cut this out, laminate and keep it on your person in case of an emergency.



## 7. Monitoring

As an employer, the Trust ensures that there is sample monitoring of off-site visits and Outdoor Learning activities undertaken by its establishments, either by attaching such monitoring duties to its officers, or by delegating these tasks to establishments. Such monitoring should be in keeping with the recommendations of OEAP National Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the academy EVC.

Refer to **OEAP National Guidance** document: [Monitoring](#)

## 8. Leader Competence

To be deemed competent, a Visit/Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognised good practice for that role.*

All staff and helpers must be competent to carry out their defined roles and responsibilities.

OEAP National Guidance sets a clear standard to which Trust Visit Leaders **must** work. The guidance states:

*“a competent Visit /Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:*

- *Knowledge and understanding of their employer’s guidance supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.*
- *Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.*
- *Knowledge and understanding of the group, the staff, the activity and the venue.*
- *Appropriate experience*
- *In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.”*

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. The academy must view the original documents and certificates when verifying leader’s qualifications, and not rely on photocopies.

All new staff must receive off-site visit training before they can lead their own trip. Staff then wishing to lead their own visit should first participate in other visits. Over a period of time they should become specifically competent and knowledgeable of this policy and associated procedures. They should have been involved in the planning of previous visits, and understand the role and responsibilities of the Visit Leader and accompanying adults. They should also have experience of the ongoing monitoring of the visit and an evaluation of the visit after the event.

Depending on their level of experience the member of staff wishing to lead a visit should then attend either a full day or condensed VLT training course.

Once the member of staff has received appropriate VLT training and they are deemed competent by the Head and EVC he/she can then lead their own visits. The first visit must be planned with the support of a designated experienced mentor.

Where a Volunteer Helper is a parent (or otherwise in a close relationship to of a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader’s plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment.

Refer to **OEAP National Guidance** document: [“Good Practice Basics”](#)

## Assessment

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the policy that all Trust leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with the OEAP National guidance.

The EVC and/or Head Teacher must 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 Visit History on EVOLVE).
- b) Is the leader competent in planning and managing visits (has s/he completed Visit Leader Training?)
- c) What are the leader's reasons for undertaking the visit?
- d) Is the leader an employee of the local authority / establishment?
- e) Does the leader have the ability to manage the pastoral welfare of participants?
- f) Does the leader exhibit sound decision-making abilities?
- g) What experience has the leader of the participants he/she intends to supervise?
- h) What experience has the leader of the environment and geographical area chosen?
- i) Does the leader possess appropriate qualifications?
- j) If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- k) If leading adventurous activities, has the leader been 'approved' by the Trust?
- l) Is the leader aware of all relevant guidelines and able to act on these?

Refer to **OEAP National Guidance** document: [Assessment of Activity and Visit Leader Competence](#) and [Assessment of Competence](#)

## 9. Charges for Off-site Activities and Visits

Academy Heads/Managers, Curriculum Planners, EVC's and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to **OEAP National Guidance** document: [Charges for Off-site Activity](#)

## 10. Vetting and DBS Checks

Establishment employees who work *frequently* or *intensively* with, or have *regular access* to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process as they will be working in Regulated Activity.

For the purposes of this guidance:

- *frequently* is defined as "once a week or more";
- *intensively* is defined as 4 days or more in a 30 day period or overnight.

When using volunteers: if the volunteer is under direct supervision by an employed member of establishment staff (that has a DBS check), the volunteer may not need a DBS check. Please consult [DfE guidance](#) for further information.

It must be clearly understood that a DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people. The placement of an adult within a situation of trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always have been appropriately and thoroughly risk assessed

Refer to **OEAP National Guidance** document: [“Vetting and DBS Checks”](#)

## 11. Parent / Carer Consent

*“A school must always get written consent for nursery age children.*

*For children over nursery age, written consent is not needed for most trips, as they’re part of the curriculum. However, it’s good practice to tell parents about them.*

*Written consent is usually only needed for trips that:*

- *need a higher level of risk assessment*
- *are outside normal school hours”*

See DfE [Guidance](#)

The DfE’s [Consent for school trips and other off-site activities form](#) can be used to gather annual consent.

### Good Practice

- a. Even though ‘consent’ may not be required for off-site activities that take place during school hours and which are a normal part of a child’s education it remains good practice to inform parents. This can be done in a variety of ways such as information on enrolment; school prospectus; policy documents; website. Be clear about the need for a broad and balanced curriculum and that children will not always be on the school site but in the wider community.
- b. Where consent is required make sure that parents and carers have sufficient information to make informed consent about the participation of their child. Where a one-off blanket consent form has been used to obtain parental consent it is essential that such blanket consent is turned in to informed consent prior to a visit. Parents must be given information about the visit and the nature of their child’s participation and given the opportunity to withdraw consent should they wish them not to participate.
- c. Even though a parent/carer may have signed an annual consent form we would recommend that visit specific consent forms should be sent out for category ‘C’ visits. Parents should be given the opportunity, and prompted, to update the school regarding changes to medical and dietary information.

If academies choose to adopt a version of the DfE ‘one-off’ consent form they will need to put in place separate arrangements for ensuring that essential information is kept up to date including:

- Emergency contact names and numbers
- Medical issues and allergies

The Trust recommends that academies continue to be use specific **EV4** consent forms for more complex visits.

### Taking copies of consent forms on visits

There is no requirement for visit leaders to carry evidence of consent on visits in the UK, however, they **must** be taken on any visit abroad.

Refer to **OEAP National Guidance** documents: [Parental Consent](#)

## 12. Requirement to Ensure Effective Supervision

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is “effective”. However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years, see [Statutory Framework for the Early Years Foundation Stage](#)

Effective supervision should be determined by risk assessment and proper consideration of:

- age (including the developmental age) of the group;
- gender issues; such as mix of accompanying staff
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions,
- staff competence
- Where volunteers are used: the number of employed staff supervising volunteers, volunteer competence and the establishments knowledge of the volunteers’ suitability and performance.

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

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.

**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, including their own children. Heads/Managers and EVCs should review the risk assessment to consider whether the presence of a supervisor’s child will require these assessments to be modified.** Staff taking their own children on a visit should not be included in the calculation of the overall staff ratio i.e. there must be sufficient appropriately qualified and experienced staff to safely manage the group without them if necessary.

### **Children of group leaders and other supervising staff**

There are a number of issues of concern if staff propose to take their own children on a visit, for example:

- the child may not be insured;
- staff may be distracted by dealing with their own children, particularly if they are tired or unwell and this may compromise their ability to carry out their responsibilities for the rest of the group effectively;
- there may be additional costs incurred, which should be met by the staff member.
- The child is physically able and of a similar age to the group if taking part in activities

**The Head/Manager must specifically check if insurance cover is in place for the child/children concerned.**

Refer to **OEAP National Guidance** documents: [Group Management and Supervision](#), [Ratios and Effective Supervision](#), [Vetting and DBS Checks](#)

## 13. Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement.



Regarding External Provider selection, **The Trust takes the view that where a provider holds the LOTC Quality Badge, there should be no need to seek further assurances. If the provider does not, academies should use the EV2 External Provider Check form as part of the checking process. This can be found in the Resources section on EVOLVE.**

Refer to: **OEAP National Guidance** document [Preliminary Visits and Provider Assurances](#)

## **14. Insurance for Off-site Activities and Visits**

Employer's Liability Insurance is a statutory requirement and the Trust holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it. This cover extends to those persons who are acting in a voluntary capacity as assistant supervisors. The Trust also holds Public Liability insurance, indemnifying it against all claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property as a result of any negligent acts. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities such as off-site activities and visits organised by all establishments and settings for which the employer is responsible.

Some level of Personal Accident Insurance is provided for all Trust employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit/Activity Leaders should be advised that they should consider taking out additional limited personal accident cover either through the Trust, privately, or obtain cover through a professional association.

School Visit and Activity leaders should contact the Insurance provider (RPA Cover Helpdesk [rpaadvice@willistowerswatsonsecure.com](mailto:rpaadvice@willistowerswatsonsecure.com) or Tel: 0117 9769361) to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Academies must make their own insurance arrangements, where additional cover is required over and above the insurance that is organised centrally.

Appropriate insurance must be in place for all visits.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card) or UK GHIC (UK Global Health Insurance Card). See [Apply for a UK Global Health Insurance Card \(GHIC\) - GOV.UK \(www.gov.uk\)](#)

Refer to **OEAP National Guidance** document: ["Insurance"](#)

## **15. First Aid**

**First aid provision should form part of the risk assessment for all visits. This will help to determine first aid staffing and equipment.**

On each visit one of the staff must be prepared to take the lead in managing first aid and take the role of appointed person. It is recommended that a competent first aider accompany visits, with a readily available first aid kit and the arrangements for providing first aid must be clear to all staff involved.

**Competence may be recognised by prior knowledge and experience, or, preferably, as a result of formal training. Leaders are encouraged to attend a course run by the Red Cross, St. John Ambulance, or other HSE recognised training provider. L.E.A.D. also run a range of accredited courses using a competent in-house trainer via the Teaching School. It is a requirement for staff to upload any first aid certificates onto their EVOLVE profile.**

At least one of the staff on any residential visit **must** hold a current First Aid qualification.

The level of staff competence, which may be required will depend on many factors including:

- The nature of the programme and whether it is residential (**see note above regarding qualification**)
- Whether the programme includes adventurous activities
- The numbers in the group
- The extent to which "outside" first aid assistance is available (e.g. at a residential centre)
- The environment and particularly whether it is abroad or remote.
- The health and medical needs of group members.

First Aid requirements for Early Years are specified and must be adhered to; see [Statutory Framework for the Early Years Foundation Stage](#).

If staff are delivering outdoor and adventurous activities the leader (and/or assistant) must hold a current first-aid certificate and carry a suitable first-aid kit. (Where employees hold Outdoor Activity coaching qualifications, they will normally be required by the governing body of the sport to hold a current first aid certificate for the award to be valid). It is desirable for them to hold first aid courses designed to train people to cope with first aid situations in the outdoor environment.

Where adventure activities are provided by an AALA licensed provider, instructors should hold recognised first aid qualifications, in which case it may not be essential for academy staff to hold a qualification. Risk assessment of the overall visit should determine this.

Refer to **OEAP Employer Guidance** document: [First Aid](#)

Further Policy and guidance on managing first aid is available on The Trust's SharePoint System, in the Health and Safety section, under First Aid / Policy and Arrangements.

## **16. Inclusion**

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Academies should take all *reasonably practicable* measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in establishment policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Equality Act 2010, it is unlawful to:

- treat a disabled young person less favourably;

- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage.

Refer to **OEAP National Guidance document**: [Special educational needs and disability](#)

## 17. Planning

Planning should reflect the consideration of legal and good practice requirements, ensuring:

- The plan is based on academy procedures and Trust guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

EVOLVE provides a means of recording planning during the planning phase, and enables the EVC and Head/Manager to monitor, contribute and support the activity. It is recommended that staff use EVOLVE for planning most visits as this ensures a consistent and proportional system is applied.

Other benefits include:

- Having a central record of all visits
- Having a full record of staff experience, which provides a database of evidence to support decisions on competence
- Providing a central record of staff qualifications
- The EVC is able to produce customised reports for governors, Ofsted etc
- If staff use the system regularly they rapidly become fluent and confident
- All staff have ready access to employer guidance relating to visits.

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

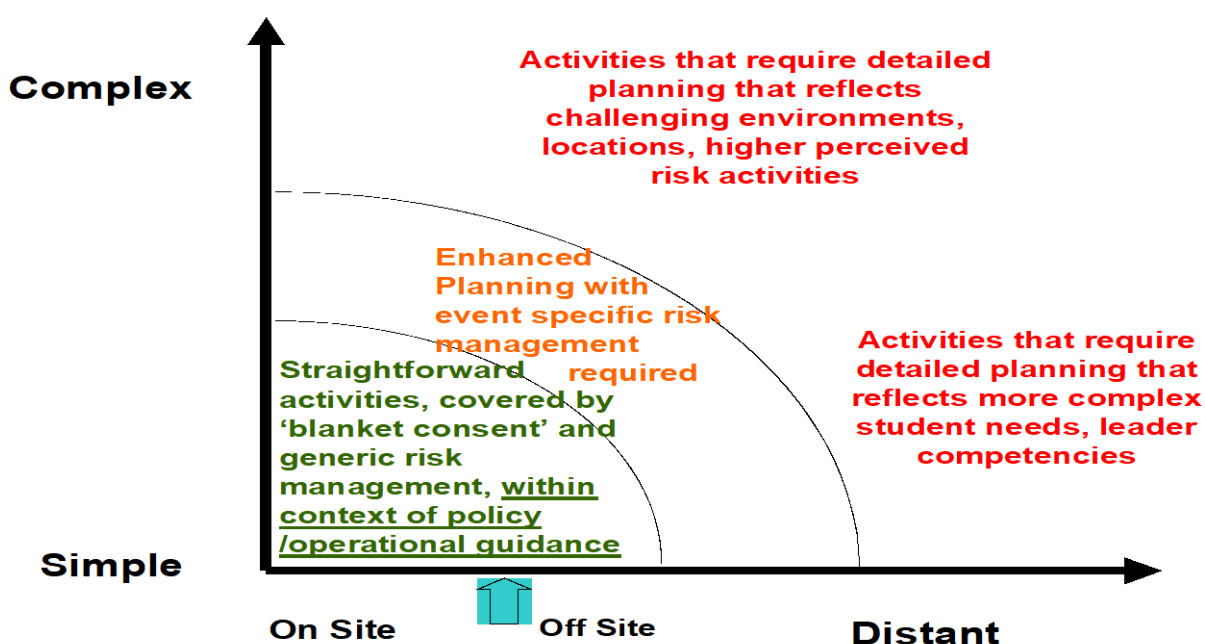
- Diagram: [Planning and EVOLVE](#), found on **page 22**, below.
- **OEAP National Guidance** document: [Visit Leader Checklist](#)
- **OEAP National Guidance** [RADAR](#) model: based on SAGED: Staffing, Activity, Group, Environment, Distance.

It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out an exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigor (an Ofsted expectation), then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and also be a vital part of the risk management process in providing some objectivity in a “Risk Benefit Analysis”. Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

This supports the move towards developing activity-specific policies at academy level for regular or routine activities. Such policies should be robust and equate to “operational guidance” that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as “STAGED” as explained below.

- **S**taffing requirements – trained? experienced? competent? ratios?
- **T**ransport – size, seating arrangements, seatbelts, supervision, emergencies?
- **A**ctivity characteristics – specialist? insurance issues? licensable?
- **G**roup characteristics – prior experience? ability? behaviour? special and medical needs?
- **E**nvironmental conditions – like last time? impact of weather? water levels?
- **D**istance from support mechanisms in place at the home base – transport? residential?



Refer to LOfC National Guidance document: “[Planning Basics](#)”

Refer to LOfC National Guidance Power Point: “[Planning Visits Off-site Activity and LOfC](#)”

### 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 ‘rules’ should be in line with the school code of conduct and be re-emphasised as appropriate during the visit.

Monitoring of the visit must be on-going, and 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 (or switch to Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

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 **OEAP National Guidance** document: [Responsibilities of Visit Leader](#)

## 18. Using an External Provider

An 'External Provider' normally provides one or more elements on an activity or visit such as instruction, staffing, guiding, or accommodation. This may be, for example:

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

For the purposes of Trust approval, an External Provider is **NOT**:

- a Campsite
- Museums, galleries, etc
- Tourist attractions
- Theme Park
- Farm
- a Coach, Train, or Airline company
- where instruction is provided by a member of your establishment's staff with an approved Leader Approval Form (LAR) / Activity Leader Form (ALF) ([Section 32](#) applies)

### Residential Providers

You must make reasonable checks to ensure that the accommodation is suitable for your group. There should be appropriate security arrangements to prevent unauthorised persons entering the accommodation, separate male and female accommodation and washing facilities with staff accommodation close to participants' accommodation. In the UK accommodation should be: covered by a current fire certificate and / or advice has been sought from a fire officer and implemented; and a fire risk assessment has been completed. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned.

Refer to the Trust **Generic Risk Assessment: Accommodation**, found in the Resources and Guidance section on EVOLVE

Some residential providers may hold a LOtC Quality Badge. If not, it may be helpful to use the EV2 Form to gather this information (and retain evidence). Alternatively, you could carry out a pre-visit and take a checklist. Indicate on your EVOLVE application how you have checked out the accommodation.

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Head Teacher does not 'approve' external providers or tour operators. Establishments may find it useful to 'Search by External Provider' on EVOLVE, and liaise with other academies within the Trust that have used a particular provider. Further steps may include:

- Asking for written references from other groups if the provider is not known locally, and contacting the referees directly;
- Inviting presentations and quotations from providers offering a similar service to ensure that you are getting good value for money;

- Visiting a course being run for another group to observe standards and talk “informally” to staff from that group.

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

a) The Provider holds an LOfC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**or**

b) An ‘EV2 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.

### **For Providers that hold an LOfC Quality Badge**

Check that the provider’s Quality Badge will be valid on the date of your visit ([click here](#)). Academies must ensure the provider has at least £5 million public liability (Academy staff should check their employer requirements) 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. A pre-visit and recommendation from previous users will help you decide on its suitability.

See [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

### **For Providers that do not hold an LOfC Quality Badge**

- Download an EV2 Form from EVOLVE.
- Complete the top section.
- Send EV2 Form to the provider (email, fax, post).
- On its return check that it has been satisfactorily completed.
- Keep EV2 Form on file together with all other relevant documentation.
- Attach a copy of the Provider Form to EVOLVE.

**Important:** The Provider Form (**EV2**) 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.

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 OEA prior to making a commitment with the Provider.

The satisfactory completion of an EV2 Form does not necessarily signify that the service on offer will be appropriate for the young people from your academy. A pre-visit and recommendation from previous users will help you decide on its suitability.

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 and **must** be complied with, see [Appendix 1 – Adventure Activities and Overseas Expeditions](#).

For further guidance on external providers refer to [OEAP NG guidance](#).

## **19. Adventure Activities Licensing Regulations**

Employers, Heads/Managers, EVCs and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA), initially responsible to the DfE. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

The intention of the regulations is to provide a regulatory framework to protect children, parents, teachers and schools when using providers of defined adventurous activities in closely defined environments. The regulations and supporting inspection regime provide a formal process of professional inspection to accredit that providers have effective safety management systems and processes, meeting a national standard.

The definitive source of advice on the Licensing Regulations is to be found in the Health and Safety Executive publication: "[Guidance to the Licensing Authority on Adventure Activity Licensing Regulations 1996](#)".

Leaders should be aware that the AALS license is an assurance of safety. It does not accredit educational or activity quality.

**Where adventure centres are providers of “in scope” activities as defined by the regulations, they are required to be licensed.** Refer to OEAP National Guidance document: [AALA Licensing](#)

## 20. Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it. Academies can use the generic risk assessment, found in the Resources section of EVOLVE to plan their visits. All national and local regulatory requirements **must** be followed.

The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

The Visit Leader should ensure that coaches and buses are hired from a reputable LA's may provide access to lists of preferred/vetted transport providers. This [checklist](#) may be useful.

Transporting young people in private cars (by staff or volunteers) requires very careful consideration. Where this occurs, there should be recorded procedures covering driver and vehicle safety and safeguarding (see the L.E.A.D. Generic Risk Assessment for Travel by Private Car) and below OEAP NG document. If in any doubt, please contact the Educational Visits Advisor.

Refer to **OEAP National Guidance document:** "[Transport: General Considerations](#)"

Refer to **OEAP National Guidance document:** "[Transport in Private Cars](#)"

Refer to **L.E.A.D. Generic Risk Assessments** relating to Transport, which cover Travel by 'Foot', 'Private Car', 'Minibus', 'Coach' and 'Public Transport'. These risk assessments can be found in the **Resources section of EVOLVE.**

## 21. Farm Visits

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

Refer to **Farming & Countryside Education:** [www.face-online.org.uk](http://www.face-online.org.uk)

Refer to **OEAP National Guidance document:** [Farm Visits](#)

Refer to **L.E.A.D. Generic Risk Assessment** on Farm Visits, found in the **Resources section of EVOLVE**

## 22. 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.**

In this context, paddling means walking in shallow sheltered water (below knee height on the participants).

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

At the outset the establishment must decide whether the activity:

- a) Falls **within** the definition in bold above - in which case the guidance below applies,

*or*

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

Refer to **L.E.A.D. Generic Risk Assessment**: 'Water Margins' and 'Paddling', found in the **Resources and Guidance section on EVOLVE**

## 23. Water-Based Activities

For clarification of the differences between water-margin and water-based activities see [Section 22](#) the Trust 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. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

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

- Swimming in publicly lifeguarded pools - see [Section 24](#)
- Water-margin activities as defined in [Section 22](#)
- Use of commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

With the exception of the above, all other forms of water-based activities are regarded as adventurous activities, and as such require Trust approval.

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

- a) **An external provider** - see [Section 18](#)

The provider must hold an [LOtC Quality Badge](#) or complete an EV2 form

Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not an LOtC Quality Badge, then an EV2 Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the



accompanying staff retain a 'pastoral' duty of care.

**or**

- b) **A member of your academy staff** – (see [Section 32](#) and for further details on adventure activities refer to **the OEA for advice**). This person must be specifically approved by the Trust 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 and relevant BS EN standard for the level of activity undertaken 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.

## 24. Swimming

The Trust 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.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken. For paddling refer to [Section 22](#) Water Margin Activities.

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.

Particular consideration should be given to the following factors:

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

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

**For Swimming pools (lifeguarded)** Trust 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 academy's staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water and that this will be maintained at all times where participants are in the water. Contact with the pool in advance to inform them of numbers and any special requirements is essential.

- Unless suitably qualified and trained in the Normal Operation Procedure (NOP) and Emergency Action Plan (EAP) for the specific pool to be used, the establishment'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 and perform a 'spotting' role as additional eyes and ears for the lifeguard. This especially applies when using lifeguarded pools in hotels.
- Unless suitably qualified, the academy'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 academy should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

For further guidance refer to the **L.E.A.D. Generic risk assessment for Use of Swimming Pools on Visits, found in the resources section of EVOLVE.**

Refer to **National Guidance: [Swimming Pools](#) and [Open Water Swimming](#)**

**For open water swimming and pools without lifeguards refer to [Appendix 1 Adventure Activities & Overseas Expeditions](#)**

## 25. Residential Visits

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

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

### Supervision on Residential Visits

Mixed parties engaged in journeys involving an overnight stay should normally be accompanied by at least one adult of each sex. In this case the responsible adult may be a parent or student over the age of 18, acceptable to the group leader, assessed as being suitable by the Head/Manager and have undergone DBS checks in accordance with council / employer guidance.

In Primary Schools it may be acceptable for female teachers only to accompany mixed parties provided the Governors, Head, parents and staff involved are satisfied that this is an appropriate arrangement and in exceptional circumstances this can apply to secondary school pupils if effectively risk assessed and all relevant parties agree.

Staff retain a duty of care for young people throughout the visit – even if a provider is delivering activities or assisting with overnight supervision. They are always responsible for pastoral care and must be able to deal with an emergency effectively, at all times.

**Academies should have clear written policies relating to staff conduct on residential. Staff must not smoke in front of young people and should smoke away from buildings and clearly it would be unprofessional for staff to be intoxicated on any visit. There are clear disciplinary procedures in the terms and conditions of employment of staff in relation to Drugs and Alcohol. Policies should be discussed with volunteers as part of their briefing / induction.**

Heads, EVCs and Visit Leaders should check:

- That suitable and sufficient Insurance is in place for all participants (including staff and volunteers)
- All staff have been had appropriate DBS checks

- The accommodation is suitable for the group (for example the provider may hold a LOTC Quality Badge, or should complete the relevant sections of the EV2 Form (The EV2 Form should be attached to the EVOLVE application). Also refer to [Section 18](#)

Refer to **OEAP Employer Guidance** document: [Residential Visits Mind Map](#)

Refer to **L.E.A.D. Generic Risk Assessment for Accommodation**, available in the **Resources section on EVOLVE**.

## 26. Medication

### Non-prescription medicines and residential visits

In school, The Trust policy is that non-prescription medicines should not normally be given to pupils. This policy is designed to protect the best interests of the child, as well as those of staff. It takes into account several factors:

- the child may well be able to return home if s/he is unwell;
- generally the child will return home at the end of school and a parent/guardian can administer medication if appropriate;
- it should be relatively straightforward to visit a doctor, if required.

However this approach may be inappropriate **on a residential visit**. If a child develops toothache during the night, or a young woman is suffering from period pains, it may be both impractical (and inappropriate) to call a doctor or visit casualty. In some circumstances (during a long coach journey to France for example) it may be difficult to visit a doctor to deal with a problem such as a migraine.

Taking into account the circumstances it may be appropriate, in accordance with the expectation of the 'duty of care', which the group leader holds, for him/her to use judgement and common sense (as a parent would) and provide a mild painkiller, however:

“Staff should **never** give a non-prescribed medicine to a child unless there is specific prior written permission from the parents. Where the head agrees to administer a non-prescribed medicine it **must** be in accordance with the employer’s policy. The employer’s policy should set out the circumstances under which staff may administer non-prescribed medicines. Criteria, in the national standards for under 8s day care providers, make it clear that non-prescription medicines should not normally be administered. Where a non-prescribed medicine is administered to a child it should be recorded .....and the parents informed..... **A child under 16 should never be given aspirin or medicines containing ibuprofen unless prescribed by a doctor**”.

### [\(DFE - Managing Medicines in Schools and Early Years Settings\)](#)

It must be emphasised that the group leader would take this role on a voluntary basis. Academies should clarify their approach to non-prescribed medicines in their policies. Consider using a modified version of the [Model Letter](#), to obtain parental consent for providing non-prescription medicines. Alternatively, this could be incorporated into the main consent form for the visit.

For further advice please refer to **OEAPNG: Medication**

## 27. Overseas Visits

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

**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.
- d) Advice should be sought regarding the need for inoculations (or other treatment) to be taken as a precautionary measure prior to the visit.
- e) In some countries, such as South Africa, parental permission must be sought and an affidavit signed allowing another adult (Visit Leader) to take a child into and out of the country.

The visit leader should consider the relevant country information from the Foreign, Commonwealth and Development Office website: [Foreign Commonwealth & Development Office - GOV.UK \(www.gov.uk\)](http://www.gov.uk) ('Home' page, 'Travel & Living Abroad', 'Travel Advice by Country'). All relevant FCO information should be circulated amongst the staff team.

Appropriate insurance must be in place for all visits.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card) or UK GHIC (UK Global Health Insurance Card). See [Apply for a UK Global Health Insurance Card \(GHIC\) - GOV.UK \(www.gov.uk\)](http://www.gov.uk). Refer to the **L.E.A.D. Generic Risk Assessment on Visits Abroad**, found in the **Resources section of EVOLVE**.

### **Organising your own visit**

Visit Organisers who decide to arrange travel independently may seek the advice and help of the Foreign Commonwealth & Development Office's (FCDO) Travel Advice Unit or the government funded Central Bureau for Educational Visits (CBEVE).

Under The Package Travel, Package Holidays and Package Tours Regulations 1992, schools may themselves become organisers, where they contract directly with hotels and apartments for accommodation and with an airline, coach or ferry company for transport and/or with others for excursions.

As an organiser, however, the school would have to provide sufficient guarantee for the refund of money paid over and for the repatriation of the consumer in the event of insolvency.

Group leaders organising their own visits should be aware of the EC Directive on Package Travel, Package Holidays and the Package Tours Regulations 1992, as mentioned above.

These regulations impose obligations and liabilities on the "reorganiser" or "other party to the contract" in the case of package travel. Academies organising their own educational visits abroad should be able to justify why their visit is not within scope of these Regulations.

- A "package" is a combination of any two of: accommodation, transport and other tourist services. To be exempt from the Regulations, a package should not be a regular event.
- The regulations should not apply for visits that have a clear educational aim and are part of the curriculum of the pupils. Academies should therefore clearly state the main educational aim(s) of the visit on their visit approval forms.
- The package travel regulations are quite complex and schools unsure of their situation should contact the Department of Trade and Industry or CBEVE. The DTI advise that school ski trips (which are voluntary activities undertaken by some pupils) fall within the regulations unless they are organised only occasionally. Academies are therefore advised generally to organise ski visits through bonded tour operators. For academies making their own accounts under the control of a trustee may be the only realistic option.

Refer to **National Guidance:** [Overseas Visits](#)

## 28. Overseas Expeditions

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

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 Trust approval to be granted**. A 'Note' (for the attention of the Trust) should be added to the EVOLVE Visit Form as soon as possible during the planning stages.

Overseas Expeditions will only be approved by the Trust if the provider either:

- a) Holds an LOTC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) **or**
- b) Provides a statement of compliance with [Guidance for Overseas Expeditions, Edition 3](#)  
*and conforms to BS8848*

The contract for the expedition **must** be with the school not direct with parents (refer to Section K: Contracts and Legal Issues, of the above guidance).

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 academies 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, academies 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](http://www.rgs.org/eac)

Refer to L.E.A.D. Generic risk assessment on Overseas Expeditions found in EVOLVE, in the Resources section

Refer to **National Guidance:** [Overseas Expeditions](#) and [Mind map overseas Expeditions](#)

## 29. Exchange Visits

**The Trust has adopted the OEAP National Guidance document:** [Exchanges and homestays](#) found in the Resources section of EVOLVE.

Trust academies are required to adhere to all relevant aspects of this guidance when organising exchange visits and homestays.

Please note that DBS checks are not normally required for host families – but host families in the UK and abroad should fill in the [Host Family Stay Information Form](#) (see the above guidance document – translations are available). Control measures and contingency plans outlined in this guidance should be put in place.

Refer to the British Council (Learning) [www.britishcouncil.org](http://www.britishcouncil.org)

Refer to **OEAP National Guidance document**: [Exchanges & home-stays](#) and [Mind map Student Exchange](#)

Refer to **OEAP National Guidance document**: [Overseas visits](#)

Refer to L.E.A.D. Generic Risk assessment on Foreign Exchange Visits, in the resources section of EVOLVE.

**Overseas Expeditions:** refer to [Appendix 1 Adventure Activities & Overseas Expeditions](#)

### 30. Weather and Clothing

Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice. Participants should be adequately clothed according to:

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

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

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

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

### 31. Definition of an ‘Adventurous Activity’

**The following activities are regarded as ‘adventurous’ and require Trust approval via EVOLVE:**

- All activities in ‘remote/open country’ (see below)
- Swimming (all forms, excluding publicly lifeguarded pools)
- Camping
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including climbing walls)
- Abseiling

- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration
- Shooting and archery
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- Off road cycling/ mountain biking
- ‘Extreme’ sports
- Other activities (e.g. initiative exercises) involving skills inherent in any of the above

Refer to Figure 2, below.

‘Remote/Open country’ is normally defined Moorland (open uncultivated land at any height above sea level) or Mountain (more than 600m above sea-level and/or from which it would take more than 30 minutes travelling time (2.5km) to reach any accessible road or refuge). However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the Educational Visits Adviser, Andrew Smith (Tel: 07932 450914 e-mail:[advice@evoltheadvice.co.uk](mailto:advice@evoltheadvice.co.uk)), if you think this might apply. For level of competence required to lead in remote/open country see the L.E.A.D. Walking Risk assessment found in the Resources section of EVOLVE.

For further details on adventure activities refer to section 29, below.

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

- Walking in parks or on non-remote country paths
- Field studies - unless in the environments stated in ‘open country’
- Swimming in publicly lifeguarded pools
- Theme parks
- Tourist attractions (including commercial ‘show caves’)
- 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 22](#)

Please contact Andrew Smith, Offsite/Educational Visits Adviser if there is uncertainty over whether a particular activity requires Trust approval.

## 32. Adventurous Activities

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

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

- a) **An external provider** - see [Section 18](#)  
The provider must hold an [LOtC Quality Badge](#) or complete an EV2 Form  
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 establishment's staff** - see [Section 32](#)  
This person must be specifically approved by "The Trust" to lead the activity, via EVOLVE.

For further details on adventure activities refer to [Appendix 1 – Adventure Activities and Overseas Expeditions](#)

### 33. 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 29](#), 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. Staff should update this record as required (e.g. when first aid training is renewed). The staff member should then submit an Activity Leader Form (ALF) to the Trust via EVOLVE.

The visit leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (eg dates, venues, numbers, etc). The ALF will then be embedded within the Visit Form for that particular visit.

On receipt of a Visit Form (and embedded ALF), L.E.A.D. will view the proposed activity in the context of the leader's competencies and qualifications. Where approval is not granted to lead the activity, the Visit Form will be returned to the EVC via EVOLVE, with an attached note. Where this is the case the activity must not take place.

#### Criteria for Approval

Approval will normally be given where the leader of the activity has recent relevant experience, is appropriately qualified through the relevant National Governing Body and holds an appropriate first aid qualification. To confirm this, the leader should submit an ALF to the Trust via EVOLVE.

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

Approval will always be subject to a requirement that the leader must act at all times within the remit of his/her qualifications, and in accordance with National Governing Body Guidelines where these exist. Approval may also be subject to other conditions, which will be specified by the Trust on the Visit Form. Where there is insufficient information for the Trust to make a decision regarding approval, then the applicant may be asked to provide further information (e.g. evidence of awards, experience, and log book details, etc). In some cases, a meeting with the applicant may be requested by the Trust.

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 is the responsibility of Head Teacher and/or EVC.



For further details on adventure activities refer to Appendix 1 – Adventure Activities and Overseas Expeditions.

## 34. Emergency Procedures

Academies should ensure that their Health and Safety policy / school emergency procedures includes off-site visits.

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

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.

For useful forms and checklists, see the Emergencies tab in the Resources section of EVOLVE

Refer to **OEAP Employer Guidance document:** [Critical Incident Management: The Employer's Role, Emergency Planning: The Establishment's Role, Emergency Procedures for Visit Leaders](#)

## 35. Accident and Incident Reporting

Head teachers must ensure they meet the requirements of the RIDDOR regulations and good practice. Refer to the Trust's procedures and on-line forms. These should be recorded on the Medical Tracker system.

Academies must ensure they have equivalent procedures to meet the requirements of the law and good practice.

Where an incident or accident occurs on an activity led by a Provider, please ensure this is reported to the Offsite/Educational Visits Adviser, Andrew Smith (Tel: 07932 450914 email: [advice@evolveadvice.co.uk](mailto:advice@evolveadvice.co.uk) )

## 36. The Value and Evaluation of Outdoor Learning

The Ofsted report "[Learning Outside the Classroom – How Far Should You Go?](#)" (October 2008) makes statements in the strongest terms to support the value of Outdoor Learning, including the fact that it raises achievement. Heads, Managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report.

Refer to **OEAP NG document:** "[Ofsted and LOtC Summary](#)"

However, it also highlights the finding that *even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigor* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the OEAP National Guidance document: [Rigorous Evaluation of LOtC: Meeting Ofsted Expectations](#)

# Appendix 1 – Adventure Activities

## Adventure Activities led by Trust Employees

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## Introduction

This appendix includes specific information relating to the adventure activities, which are most commonly run or organised by the Trust. If you are planning an adventure activity for which procedures are not outlined in this section, you should follow the National Governing Body guidance for that activity including any requirements for staff competence, qualifications, safety equipment, ratios, etc. (where this is available). In the absence of such guidance, or if there is doubt, you should contact the Offsite/Educational Visits Adviser at an early stage of the planning.

The following notes are provided to make clear the range of national and local qualifications available, **and to outline the minimum standards of competence required by the Trust**. Suggested Staff/student ratios are included - but ratios should always be reviewed as part of the risk assessment. Adventure Activities and Overseas Expeditions require Trust approval. Staff planning to deliver an Adventure Activity must first submit a Activity Leader Form(ALF). Refer to **Guidelines for Offsite Visits and Adventure Activities**:

- [Section 31 Adventure Activities](#)
- [Section 32 Approval of Staff to Lead an Adventure Activity](#)

Where national or local coaching awards exist, they provide a useful benchmark for levels of technical competence, but managers/Heads **and EVCs should balance this with knowledge of the experience and competence of the member of staff to be leading the activity**. Even the most exhaustive of national qualifications is assessed in a matter of days, or at the most weeks. It is usually outside the remit of these qualifications to measure group control, or the ability to deal with difficult or disruptive young people. In many instances, these qualities coupled with a clear understanding of the leader's own working limitations, are as important to the safe running of activities as good equipment and technical competence.

**Where qualifications are specified or relevant, the Manager/Head/EVC must ensure that any employees or volunteers running activities produce evidence of their qualification (original certificates and logbooks must be produced), and copies are uploaded onto EVOLVE. Refer to [Section 32](#) above.**

Awards held by instructors / leaders must be currently valid with the National Governing Body, including:

- Paid up membership where required

- Valid First Aid qualification where required
- Evidence of recent / current activity and or revalidation where required

### **Adventure Activity Licensing**

Under some circumstances providing adventure activities to under 18s without a licence can be a criminal offence. Managers/Heads and EVCs must ensure that proposed activities do not breach licensing regulations. Advice is available from the Educational Visits Adviser.

Refer to **OEAP National Guidance** document: [Adventurous Activities](#)

### **Open Water Swimming**

**No Open Water Swimming can take place without prior Trust Approval, which MUST be sought before the activity is entered on EVOLVE.**

For further guidance and support contact the Educational Visits Adviser, Andrew Smith [www.Andrew.smith@collegest.org.uk](mailto:www.Andrew.smith@collegest.org.uk) , 0115 947 6202.

### **Hotel (and other) Swimming Pools without lifeguards**

Academies should check the lifeguarding position in advance. No swimming can take place unless local appropriately qualified staff are available.

### **Canoeing, Kayaking and other Paddlesports**

**National Governing Body:** British Canoeing

#### **Relevant Qualifications**

Administers a wide variety of instruction, coaching and leadership qualifications, which are relevant to different circumstances:

**Activities must be run by staff/instructors with appropriate BC qualifications.** They must be operating within the remit of their award: advice is available from BC or the Educational Visits Adviser.

### **Sailing**

**National Governing Body:** The Royal Yachting Association

Administers a wide variety of qualifications, which are relevant to different circumstances:

**Activities must be run by staff/instructors with appropriate RYA qualifications.** They must be operating within the remit of their award: advice is available from RYA or the Educational Visits Adviser.

## **Walking in Remote/Open Country**

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

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

For the purposes of Trust approval:

'Lowland country' is defined as:

Parks, enclosed farmland and fields (NOT moorland, mountain and/or where it is possible to be more than 30 minutes (or 2.5km, whichever is less) from an accessible road or refuge. (ASSUMES LEADER WITH GROUP)

'Remote/Open country' is normally defined as:

Moorland (open uncultivated land at any height above sea level) or Mountain (more than 600m above sea-level and/or from which it would take more than 30 minutes travelling time (2.5km) to reach any accessible road or refuge).

However, these definitions are guidelines outlining an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the Educational Visits Adviser if you think this might apply.

Remote/Open country activities are regarded as 'adventurous' and therefore these visits require Trust approval.

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

a) **An external provider** - see [Section 18](#).

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

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 academy's staff** - see requirements below.

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

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

## **Walking (including Hill Walking, Fell Walking, Rambling, etc.)**

**National Governing Body:** The Mountain Training England [www.mountain-training.org/home-nations/england](http://www.mountain-training.org/home-nations/england) and Sports Leaders UK (SLUK) [www.sportsleaders.org/awardsqualifications](http://www.sportsleaders.org/awardsqualifications)

### **Relevant Qualifications:**

For hill walking (excluding low level walks on well-marked public footpaths without technical difficulties) the member of staff/instructor must hold the appropriate qualification. They must be operating within the remit of their award: advice is available from MT or the Educational Visits Adviser.

Refer to **LEAD Generic Risk Assessment on Walking in the Resources section of EVOLE**

## **Rock Climbing (including climbing walls and abseiling)**

**National Governing Body:** The British Mountaineering Council and Mountain Training England

### **Relevant Qualifications**

Staff running rock climbing or abseiling sessions requiring the use of ropes must hold the appropriate qualification. They must be operating within the remit of their award: advice is available from the MT or the Educational Visits Adviser.

## **Snowsports**

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

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

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires Trust approval through EVOLVE.

There are advantages to snow sports taking place during term-time as opposed to during the establishment holiday period. These include: greater choice generally, less queuing 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 snow sport establishment 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.

It is strongly recommended that a member of staff intending to organise a snow sport visit (**but not instruct**, lead or supervise on snow) should hold the Snowsport Visit Training (<https://www.evolveadvice.co.uk/svt>) or Snowsport Course Organiser Award ([www.snowsportengland.org.uk](http://www.snowsportengland.org.uk)) and must have previously accompanied at least one educational snow sports visit.

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

A member of Academy 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 the Trust via EVOLVE- see [Section 32](#)

The minimum qualification to lead skiing/snowboarding on snow is:

- The Alpine Snowsport Course Leader Award (ASCL) [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) **or**
- Relevant Instructor qualification that is accepted in the resort/country of the visit

NOTE: A skiing qualification is not appropriate for instructing or supervising snowboarding and vice versa.

Young people must not participate in off-piste activities

### **Helmets**

**The wearing of helmets is now highly recommended by all participants including staff. In practice this means:**

- All participants and staff **must** wear approved snow sport helmets, which conform to BS/EN 1077/2007.
- Helmets should normally be worn during snow sport activities, and **must** be worn when local laws or regulations dictate this.

- In specific circumstances, based on risk assessment instructors / staff may determine that they are not required. A risk assessment might indicate that the wearing of a helmet was unnecessary and would or might interfere with the activity. For example, a helmet would not be required for cross-country skiing (langlauf, ski de fond). Helmets might not be required by staff without skis assisting people on or off uplift or “collecting” a group at the bottom of a nursery area. This may also be true for complete beginners learning in a segregated, gentle area through which faster skiers and snowboarders could not pass. If in doubt, helmets should be worn.

Helmets must be correctly fitted and appropriate for purpose. Staff should learn how to fit helmets so that they become competent and are able to spot if they are being worn incorrectly. Where helmets are rented, they should be fitted by the person renting the equipment to you (as are skis etc). If a parent supplies the helmet, they are responsible for it being in a serviceable condition (at the start of the snow sports tour at least) and fitting correctly. Staff should still check this.

It is possible that hire shops/tour operators will not have sufficient stocks of helmets in place so it is essential to discuss this with them in plenty of time so that adequate stocks can be made available. If you are arranging equipment rental in the UK it is useful to book helmets as part of this package to ensure all participants have suitable helmets. If not, contact your tour operator to ensure all participants will be provided with suitable helmets as part of the equipment package. Provision of helmets should be ‘costed’ as part of the overall package, not as an optional extra.

**Important:** Some resorts in USA or Canada may have unacceptable **liability waiver requirements**. The establishment must check the liability position prior to making a commitment, and should seek advice from the Education Visit Adviser before booking. All ski companies should be required to fill in and sign the EV2 – and ask if waiver statements are required.

### **Dry slope skiing and indoor slopes with artificial snow**

Training on artificial slopes is often used as a preparation for ski trips and may be used as an activity in its own right. Students should receive instruction from qualified staff.

It is recommended that a member of staff should accompany lesson groups (or if not, observe the lesson to ensure appropriate behaviour).

### **Clothing**

Helmets worn according to risk assessment and ski slope operator’s guidance– check on availability before booking. Tumbles on dry slopes can be painful and students should wear thick trousers and have their arms covered. Gloves or mittens should be worn. Thick socks should be taken.

### **Supervision by staff**

Students who have/are receiving qualified instruction may be supervised during additional practice sessions after lessons, by staff who are experienced skiers provided the participants all meet the standards of competence required by the venue. Students should not be allowed to ski alone.

**Refer to L.E.A.D. Generic Risk Assessment on Snowsports in the Resources section of EVOLVE**

### **Camping and Campcraft**

Camping may be an end in its own right, or it may provide cheap residential accommodation and the means to engage in other activities. There is no specific National Governing Body but the following qualifications, for example, provide useful training and experience of camping:

- **Camping Leader**
- **The Lowland Expedition Leaders award (LEL)**

- **The Walking Group Leaders Award (WGL)**
- **'Lowland' and 'Hill and Moorland' Leader with Expedition Skills module**
- **The Summer Mountain Training England Scheme (ML)**
- **Level 2 or Basic Food Hygiene Award – If staff are preparing food for pupils**

**It is particularly important that an appropriately qualified first-aider is available during camping trips.**

### **Group Size**

One instructor should not supervise more than ten camping. Both male and female staff should normally supervise mixed groups.

### **Before any trip**

Training should be given in erecting the tents and **especially in the safe use of stoves.**

Permission should be sought to camp. Communal equipment should be fully checked as well as personal equipment.

### **Emergency Equipment**

A first-aid kit must be available and should contain burn dressings.

**There is a high fire risk from cooking in tent doorways and this should usually not be permitted**

### **NOTE**

Staff responsible for purchasing tents should consider buying tents with entrances at each end, because of the additional safety they provide in case of fire.

Staff should be aware of the dangers involved in refilling Trangia stoves with methylated spirits, and from changing Camping Gaz cylinders. Stoves requiring the gas cylinder to be punctured should not be used (i.e. gas cylinder/bottles should be re-sealable).

Where appropriate, fuel for stoves should be held by the leader/instructor, who should supervise the refuelling of stoves.

If Duke of Edinburgh's Award groups are camping unaccompanied they should be visited at least once in the evening or morning.

Refer to **L.E.A.D. Generic Risk Assessment on Lightweight and Standing Camps** in the **resources section of EVOLVE.**

### **Orienteering**

#### **National Governing Body**

British Orienteering Federation (BOF)

#### **Relevant Qualifications**

BOF Teacher/Leader Level 1/2

BOF Instructor

1. Orienteering is an activity, which can be run at a variety of levels from a school playing field to mountains in wild country areas. Clearly the experience and expertise required of staff will increase with the demands of the terrain, and of course the progress of the group. (At a low level in a familiar area, suitably experienced staff may need no additional qualifications).

2. Staff should be wary of sending individuals off on their own particularly in parks and other open areas in the town. Depending on the circumstances it may be more appropriate to organise the groups into pairs or larger groups. Whistles should be issued for emergency use, particularly in wild country areas.

3. On rugged terrain or in wooded areas participants must wear full leg and arm cover. Footwear should be appropriate to the circumstances.

Refer to **L.E.A.D. Generic Risk Assessment on orienteering (Academy led)** in the resources section of EVOLVE.

### **Mountain Biking (and Off Road Cycling)**

#### **National Governing Body and Relevant Qualifications**

There is no one body nationally recognised as the “Governing Body” for mountain biking. However organisations such as [CTC](#) and [MIAS](#) offer training and assessment, which have wide recognition.

The British Cycling Federation offers advice on touring, etc.

1. Cycling on busy roads is hazardous, particularly with large groups. Routes should be selected to avoid main roads, and all roads if possible. If roads must be used then participants should cycle in single file, if possible with a member of staff at the front and back of the group.
2. Helmets are required at all times.
3. Bikes should be maintained in good condition and checked before use.
4. Staff should be aware that there is not an automatic right of way for cycling on public footpaths or canal towpaths. (Public roads and bridleways can be used - permits are available for some canal tow paths.) Access should be checked where necessary. Group leaders should be conscious of the erosion which can be caused by mountain bikes, and avoid sensitive areas.

#### **Staff Ratio**

At least 1:8. It is recommended to have two staff with the group especially on roads and in wild country.

### **Combined Water/Rock Activities (and other Hybrid Activities)**

**This category encompasses a wide range of activities and environments each with their own level of objective danger. A number of highly publicised accidents have occurred involving hybrid water / rock activities, and they require careful planning combined with judgement and experience. There is no single NGB qualification relevant to these activities, but certain Awards will be more or less relevant, depending on the specific environment. For activities involving movement on steep rock, and/or use of ropes, rock climbing or mountaineering qualifications may be appropriate, but for some gorges, knowledge of caving techniques may be more relevant. Expertise in white water canoeing may enable more effective ongoing risk assessment of water hazards.**

The HSE has produced an information sheet '[Combined water and rock activities: Guidance for providers](#)'

As there is no single NGB qualification appropriate to all hybrid activities, leaders must hold relevant related qualification(s), supplemented by 'in house' site specific approval following appropriate training, with assessment and certification from an 'in house' expert.

Refer to **L.E.A.D. Generic Risk Assessment on Combined water/Rock Activities** in the resources section of EVOLVE

#### **Diving**

Diving activities must be delivered by a reputable contractor with HSE approved diving qualifications e.g., PADI, BSAC, NAUI. Diving instructors must have an annual diving medical and be passed fit to dive. The contractor must complete the [Diving Contractor's Declaration form](#) below.



All activities and procedures must conform to the [HSE Approved Code of Practice \(ACOP\) for Recreational Diving Projects \(L105\)](#). The Dive Plan and Risk Assessment must be available for inspection.

### **Ratio**

For open water, the ACOP requires the minimum size of the dive team (excluding students) to be three: (one on the surface and two in the water). The person on surface watch has a key role in the event of an emergency, and this person must be:

- Competent
- Well briefed
- Familiar with the dive plan
- Able to raise the alarm and summon further assistance

The instructor/ student ratio should be determined by the dive risk assessment and project plan, but should not exceed the recommended levels of the appropriate diving organisation. It must take account of the age and experience of the students.

Leaders of school/youth groups should note that the maximum group sizes and ratios permitted by some diving organisations can be relatively high and this is an aspect of 'quality', which may be partially affected by commercial pressures rather than just risk assessments based on prevailing conditions. Low instructor to student ratios (less than 1 to 4) and a competent well-briefed surface watch are major factors in the quality and safety of initial dives with young people. The maximum group size and ratio should be clarified and agreed prior to booking.

Whilst the HSE ACOP is not enforceable abroad, it forms a useful basis for checking the suitability of overseas providers, and is a model of best practice.

If teachers or other L.E.A.D. staff are to take part in diving activities, then technically they are 'diving at work' and it is good practice for them to have a diving medical.

Equipment must be maintained by a competent person in accordance with the Approved Code of Practice and servicing should be recorded.

## Sub Aqua Provider Questionnaire

Provider \_\_\_\_\_ School/Group \_\_\_\_\_

1. Will all sub aqua activities undertaken comply with the Approved Code of Practice (Recreational Diving Projects, HSE 1998)? \_\_\_\_\_
2. Is diving equipment serviced in accordance with the manufacturer's service schedule (and any relevant national or international standards) and have cylinders been tested for fitness for use in accordance with regulations? \_\_\_\_\_
3. Is all maintenance carried out by a competent person? Are written records of inspection and maintenance kept, and available for inspection? \_\_\_\_\_
4. Do all members of the dive team hold HSE approved diving qualifications at an appropriate level for the planned activities? \_\_\_\_\_
5. Which governing body will the dive team operate under? \_\_\_\_\_
6. What will the size of the dive team be (excluding students)? \_\_\_\_\_
7. **Will the dive team include any members of the school / group staff? (If so, state their role)**  
\_\_\_\_\_
8. Have all members of the dive team had a Diving Medical within the last 12 months, and been passed fit to dive? \_\_\_\_\_
9. What will the ratio of diving instructors to students be? \_\_\_\_\_
10. Will a competent well-briefed person be on surface watch (for open water dives)? \_\_\_\_\_
11. Will the surface watch be a member of your staff team? \_\_\_\_\_
12. Has any formal enforcement action been taken against you? \_\_\_\_\_
13. How long has your company been in operation? \_\_\_\_\_
14. How long have the instructors, who will be working with the young people, been in your employment in their present capacity? \_\_\_\_\_
15. About how many young people have undertaken diving courses with your company previously? \_\_\_\_\_
16. What award will the young people be working towards? \_\_\_\_\_

Please return this form together with the Dive Plan and Risk Assessment for the training programme.

## **The Duke of Edinburgh's Award Scheme**

For guidance on operating DofE schemes please refer to DofE guidelines and associated risk assessment templates. Please also see the relevant section of this Policy (e.g. Walking, Camping etc.)

## **Trampoline Parks**

In line with OEAP National Guidance and AfPE guidance, visits to Trampoline Parks are not approved. Please contact Andrew Smith, Educational Visits Adviser for further information.

# Contacts

<b>EVOLVE</b>	<a href="https://evolve.edufocus.co.uk">https://evolve.edufocus.co.uk</a> Select L.E.A.D. Academy Trust
<b>Uplands Junior L.E.A.D. Academy</b>	Mrs Wood <a href="mailto:Twood@uplandsacademy.co.uk">Twood@uplandsacademy.co.uk</a> Mrs Carlisle <a href="mailto:lcarlisle@uplandsacademy.co.uk">lcarlisle@uplandsacademy.co.uk</a>
<b>Educational Visits Adviser</b>	Andrew Smith Mobile: 07932 450914 E-Mail: <a href="mailto:advice@evolveadvice.co.uk">advice@evolveadvice.co.uk</a>
<b>Health &amp; Safety Business Partner L.E.A.D. Academy Trust</b>	David Mikelsons Office: 0115 8225448 Mobile: 07864 652537 E-mail: <a href="mailto:david.mikelsons@leadacademytrust.co.uk">david.mikelsons@leadacademytrust.co.uk</a>
<b>Insurance questions</b>	RPA Cover Helpdesk <a href="mailto:rpaadvice@willistowerswatsonsecure.com">rpaadvice@willistowerswatsonsecure.com</a> or Tel: 0117 9769361)
<b>Emergency / Contact (24 hour)</b>	Academy to insert their own contact details as agreed by the Headteacher in consultation with Trip Leaders

**OEAP Employer Guidance** <http://oeapng.info/>

**National Library** [www.national-library.info](http://www.national-library.info)

**LoTc** [www.lotc.org.uk](http://www.lotc.org.uk)

**LoTc Quality Badge** [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**Outdoor Education** [www.oeap.info](http://www.oeap.info)

**FIGURE 1**

**CATEGORIES OF ACTIVITY AND LEVELS OF APPROVAL**

CATEGORY	LEVEL OF APPROVAL	ACTIVITY	ENVIRONMENT / LOCATION
A	VISIT LEADER or EVC via Local Learning Area Form  Use the Local Area Visits Form on EVOLVE if location defined in Academy Policy	<ul style="list-style-type: none"> <li>• Sports fixtures, within the county</li> <li>• School Swimming – formal teaching in life-guarded pools</li> <li>• Regular visits to libraries, places of worship, study support centres, local parks and open spaces, local shops etc.</li> <li>• Fieldwork in environments with no technical hazards. (e.g. Wollaton Park, Bestwood Country Park, Nottingham City Centre etc.)</li> <li>• Visits to local/city museums and Space Centre</li> </ul>	<ul style="list-style-type: none"> <li>• Local parks, residential areas and shopping areas.</li> </ul>
B	EVC and HEAD TEACHER  MUST be entered on EVOLVE	<ul style="list-style-type: none"> <li>• Full Day Visits to museums, attractions and parks some distance from the City. (Conkers, Alton Towers, Farm Visits etc.)</li> <li>• Theme Parks and other tourist attractions</li> <li>• Seaside resorts</li> <li>• Zoos</li> <li>• Ice skating</li> <li>• Swimming in public, lifeguarded, pools</li> <li>• Walking in ‘normal’ country</li> <li>• London</li> </ul>	<ul style="list-style-type: none"> <li>• Walks in ‘<b>non-remote</b>’ country <b>Non-remote Country</b> – enclosed farmland, fields, low land forest – not moorland, mountain (above 600m) and/or where it is possible to be more than 30 mins from a road or refuge.</li> <li>• ‘Water Margin’ activity</li> </ul>
C	EVC, HEAD and LEAD (Adviser)  MUST be entered on EVOLVE	<ul style="list-style-type: none"> <li>• Any visit/activity involving a Residential (overnight stay) element including Camping and ‘school sleep overs’.</li> <li>• Any visit abroad</li> <li>• Any visit involving ‘adventurous activities’, led either by a Centre, an outside provider or staff member (See Figure 2)</li> </ul>	<ul style="list-style-type: none"> <li>• Visits to hazardous environments</li> <li>• Overseas Expeditions</li> <li>• Any water-base activity</li> <li>• Any activity in Winter mountain conditions</li> <li>• Open Country/Remote terrain more than 30mins from a road (above 600m)</li> <li>• Near cliffs or steep terrain</li> <li>• Areas subject to extremes of weather or environmental change</li> <li>• Swimming in non-lifeguarded pools or open water</li> </ul>

**FIGURE 2**

**ADVENTUROUS ACTIVITY CATEGORIES**

Rock Climbing Abseiling Ice Climbing Gorge Walking Ghyll Scrambling Sea Level Traversing	Canoeing Kayaking Dragon Boating Wave Skiing White-water Rafting Improvised Rafting Sailing Sailboarding Kite surfing Use of powered craft boats Windsurfing Aquaparks	Hillwalking – in ‘open country’ Mountaineering Fell Running Pony Trekking Off Road Cycling Off-piste Skiing	Pot-holing Mine Exploration Caving
Quad biking Go-Karts  Horse Riding	Archery Rifle Shooting Fencing	<u>Remote areas:</u> Orienteering in ‘remote terrain’ Expeditions in ‘remote terrain’ Fieldwork in ‘remote terrain’ and in water.	Climbing Walls High Ropes Courses Dry Slope Skiing Grass Skiing Water Skiing Snorkeling Scuba Diving

These are not exhaustive lists. If you are in doubt about the level of activity you are undertaking, please contact the Educational Visits Adviser, Andrew Smith for further advice (Mobile: 07932 450914 E-Mail: [advice@evolveadvice.co.uk](mailto:advice@evolveadvice.co.uk))

There are a number of activities, which are not currently covered by the insurance/approved by the Trust and cannot, therefore, be undertaken:

- **Paint Balling**
- **Air Sports – paragliding, parascending, gliding, parachuting**
- **Trampoline Parks**
- **Inform Educational Visits Adviser if you are planning to undertake activities using high ropes courses**

**Figure 3**

**Supervision Ratios**

The following ratios are put forward as a starting point and should be considered as rules of thumb. The final decision on ratio for a specific trip/group should be based on risk assessment.

<b><i>Category A Visits</i></b>		
Reception	(2 : 13 and 1 : 6 thereafter – school policy)	1 QTS + 1 other
Key Stage 1 (Years 1 and 2)	2 : 15 1 : 8 thereafter (2 : 13 and 1 : 6 thereafter – school policy)	1 QTS + 1 other
Key Stage 2 (Years 3 and 4)	2 : 24 1 : 10 thereafter (2 : 20 and 1 : 8 thereafter – school policy)	1 QTS + 1 other
Key Stage 2 (Years 5 and 6)	2 : 24 1 : 10 thereafter	1 QTS + 1 other
Key Stages 3, 4 and 5 (Years 7-13)	1 : 10	1 QTS + 1 other
<b><i>Category B Visits</i></b>		
Reception	(2 : 13 and 1 : 6 thereafter – school policy)	1 QTS + 1 other
Key Stage 1 (Years 1 and 2)	2 : 12 1 : 8 thereafter (2 : 13 and 1 : 6 thereafter – school policy)	2 QTS + 1 other
Key Stage 2 (Years 3 and 4)	2 : 24 1 : 10 thereafter (2 : 20 and 1 : 8 thereafter – school policy)	1 QTS + 1 other
Key Stage 2	2 : 20 1 : 10 thereafter	2 QTS + 1 other
Key Stages 3, 4 and 5 (Years 7-13)	1 : 10 1 : 10 thereafter minimum	1 QTS + 1 other

<b>Category C Visits</b>		
Key Stage 1	N / A	N / A
Key Stage 2	2 : 15 1 : 8 thereafter	2 QTS + 1 other
Key Stages 3, 4 and 5 (Years 7-13)	1 : 10 1 : 10 thereafter minimum	1 QTS + 1 other
<b>All Visits Abroad</b>		
Key Stage 2	2 : 15 1 : 8 thereafter	2 QTS + 1 other
Key Stages 3, 4 and 5 (Years 7-13)	1 : 10 1 : 10 thereafter minimum	1 QTS + 1 other

There are many variables that may govern the appropriate staffing ratio for a particular visit or activity. A condition or set of circumstances may be more hazardous to one group or individual than another. This highlights the crucial role of Risk Assessment in the supervision aspects of off-site activities and it should never be assumed that the ratios given in this document as guidelines will always be adequate, they are the **to be reviewed as rules of thumb**. The following circumstances may apply to warrant an improvement on the minimum ratio:

- The age, gender, attitude, ability, behaviour and competence of the group members
- The extent to which young people with special needs are included in the group
- The nature of any planned specialist activities
- The experience and expertise of the adults\*
- The duration and nature of the journey
- The need to maintain adequate supervision throughout the programme

\* Please Note - Where volunteers are used: the number of employed staff supervising volunteers, volunteer competence and the academy managements knowledge of the volunteers' suitability and performance'

A useful framework for assessing requirements for ratios and effective supervision is **STAGED**:

- **Staffing:** who is needed/available? The plan must work within the limits of available numbers, abilities and experience.
- **Transport:** competent provider, vehicle size, seating, supervision, seatbelts, emergencies?
- **Activities to be undertaken:** what do you want the group to do and what is possible?
- **Group characteristics:** prior experience, abilities, behaviour and maturity, gender, any specific or medical/dietary needs.
- **Environment:** indoors or out; a public space or restricted access; urban, rural or remote; quiet or crowded; within the establishment grounds, close to the establishment or at a distance; and the ease of communications between the group and base. Do not overlook environments to be passed through between venues. For residential visits consider the accommodation and surrounding area. For outdoor environments, consider remoteness, the impact of weather, water levels and ground conditions.
- **Distance:** from support, to get replacement staff or parental collection, emergency services access