



**Learn-AT**  
Learning ~ Fellowship

## Management of Outdoor Learning, Off-site Visits and Adventurous Activities Policy

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1.	Introduction.....	1
2.	Outcomes and Benefits.....	1
3.	Provision of Employer Guidance .....	2
4.	Scope and Remit .....	3
5.	Responsibilities.....	3
6.	Ensuring Understanding of Basic Requirements .....	5
7.	<b>Leader Competence.....</b>	5
9.	<b>Educational Visit Planning.....</b>	6
10.	<b>Notification of Activities and Visits .....</b>	10
12.	Risk Management.....	12
13.	Preliminary Visits and Provider Assurances .....	12
14.	Insurance for Off-site Activities and Visits.....	13
15.	Emergency Planning and Critical Incident Support .....	13
16.	Monitoring .....	14
17.	Requirement to Ensure Effective Supervision.....	14
19.	Vetting and DBS Checks .....	16
20.	Parent / Carer Consent .....	16
21.	Inclusion .....	17
23.	Charges for Off-site Activities and Visits .....	18
25.	First Aid .....	19
26.	Using an External Provider .....	20
27.	Transport.....	20
28.	Emergency Procedures.....	20
29.	Accident and Incident Reporting.....	21
30.	Specific types of visit .....	21
31.	Residential Visits.....	23
37.	Overseas Visits .....	26
39.	Overseas Expeditions .....	28

<b>40.</b>	<b>Exchange Visits</b> .....	<b>28</b>
<b>41.</b>	<b>Weather and Clothing</b> .....	<b>29</b>
<b>42.</b>	<b>Adventure Activities Licensing Regulations</b> .....	<b>29</b>
<b>43.</b>	<b>Definition of an ‘Adventurous Activity’</b> .....	<b>30</b>
<b>46.</b>	<b>APPENDICES</b> .....	<b>32</b>
	<b>Appendix 1: Guidance for Roles and Responsibilities</b> .....	<b>33</b>

**Please note that this policy supersedes and replaces any equivalent policies or sections of policies. This policy is non-contractual and can therefore be amended without consultation. Before you use this policy, please check you have the latest version using the footer reference and Learn-AT Policy Index.**

**This policy applies to all Learn Academies Trust schools and should be read in conjunction with the latest associated guidance issued by Learn-AT.**

## **1. Introduction**

- 1.1. Learn-AT acknowledges the immense value of educational visits and related activities to our pupils. Learn-AT believes that all pupils should be given the opportunity of benefiting from participation in a wide range of visits and activities, including learning outside the classroom, local activities, day visits, residentials, field studies and outdoor adventure activities. Whether their emphasis is adventurous, academic, sporting, cultural, spiritual or creative, off-site visits and outdoor learning provide first-hand experiences that inspire and enhance learning and development in ways which are powerful and lasting. They provide a foundation for life-long learning and healthy lifestyles, as well as complementing classroom learning and enriching the curriculum.
- 1.2. This policy aims to establish a clear and coherent structure for the planning and evaluation of our off-site visits and to ensure that any risks are managed and kept to a minimum to ensure the health and safety to our pupils and staff at all times.
- 1.3. For the purpose of this policy, an educational visit is defined as:

**An event that involves children being away from their school setting while in the care of the school. This includes educational visits, outings, school trips and off-site activities such as:**

- **local visits to parks, museums, libraries**
- **sporting fixtures**
- **cultural and educational exchange trips**
- **outdoor activities such as residentials or field trips**

## **2. Outcomes and Benefits**

- 2.1. Learn-AT recognises that Outdoor Education, Learning Outside the Classroom, adventurous activity and a range of recognised sports and physical activities have, as a common thread, the intention to produce positive outcomes in terms personal and social education in addition to improved health and well-being outcomes. Learning opportunities outdoors can provide significant opportunities for participants to engage in a distinctive experience where the measurement of learning gain is complementary and additional to the inherent personal, social and health gains. Work that takes place outside the classroom can provide a very powerful means of developing learning in all curriculum areas and raise attainment.

- 2.2. It is unlikely that high quality will be achieved with consistency unless the activity takes place within a clear educational philosophy. Educational quality requires participants in activities to be engaged at a level that matches their abilities and development. Activities should, therefore, be adapted to present learning challenges at different levels appropriate to different group members or permit group members to take on different roles. It follows that young people's progress should be monitored to ensure that they can be continually motivated by new challenges.
- 2.3. Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved.
- 2.4. Work that takes place outside the classroom can provide a very powerful means of developing learning in all curriculum areas and raise attainment. Experiential learning can also provide opportunities for development in other areas, including:
  - Relationships
  - Emotional & spiritual
  - Cross curricular
  - Individual
  - Teamwork
  - Environmental
- 2.5. Preparatory work should take place in advance of the visit where appropriate. This, in conjunction with activity that will take place during the visit, and should feed into any follow up work. Reference to OEAP National Guidance document: [Rigorous evaluation of LOtC meeting Ofsted expectations](#) should be made. [High Quality Outdoor Education](#) can also be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place.

### **3. Provision of Employer Guidance**

- 3.1. The national online guidance resource [OEAP National Guidance](#) (Guidance for the Management of Off-site visits and LOtC (Learning Outside the Classroom) activities) is an invaluable reference document, which should be read alongside this policy. It is available from <http://oeapng.info/> or by clicking the link on the Evolve Trip Management portal.
- 3.2. In addition, there are a range of resources on the website which can be used to help plan and evaluate Educational Visits. See the OEAP National Guidance [Downloads](#) for outdoor learning for more information and supplementary proformas.
- 3.3. It is a legal expectation that staff must work within the requirements this policy and the OEAP National Guidance.
- 3.4. If a school chooses to commission a specific Outdoor Learning activity, they must ensure that the external provider has either:
  - adopted Academy or OEAP National Guidance

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

3.5. National Guidance does NOT apply to:

- Physical Education (PE) activities;
- Routine travel between home and establishment;
- Routine travel between sites (where an establishment operates on a split site)
- Work experience placements.

3.6. For PE, specialist PE guidance should be used, such as that provided by the Association for Physical Education (AfPE). Where PE takes place off-site, only the journey to and from the venue is covered by National Guidance. Although National Guidance is designed for off-site activities, some of the guidance may be found useful for outdoor or adventure activities taking place on the establishment's site.

## **4. Scope and Remit**

4.1. The OEAP National Guidance clarifies that this policy applies to employees whose work involves any one of the following:

- direct supervision of pupils undertaking experiences beyond the boundary of their school
- direct supervision of pupils undertaking experiences that fall within the remit of Learning Outside the Classroom
- facilitating activities for young people undertaking experiences beyond the boundary of their school
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their school

4.2. This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

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

## **5. Responsibilities**

5.1. The Health and Safety at Work Act 1974 places overall responsibility for health and safety on educational visits with Learn-AT.

5.2. All persons involved in a visit have a specific responsibility, which they should be clear about prior to the visit taking place. Venues will ask for details of local arrangements to clarify responsibilities and procedures to support school trip management.

5.3. OEAP National Guidance also sets out clear and detailed responsibilities and functions of specific roles that relate to roles found within school.

Roles:

Director of Education	<p>Coordinate the review of the Trust EVC policy and management systems</p> <p>Monitor the implementation of the Trust EVC policy within the school improvement visit cycle</p> <p>Approval of Residential Trip risk assessment and coordination</p> <p>Coordination of cross-school sharing for visit reviews and coordination of financial best practise</p>
Headteacher	<p>Ensure the EVC policy is understood by all employees and procedures are established within every day practise. Provide employer led training for the EVC to ensure they are competent and knowledgeable. Review visit evaluation forms on Evolve after a visit has taken place.</p> <p>The Headteacher should ensure that the establishment has policies and procedures for outdoor learning and visits that conform with their employer's guidance. They are responsible for ensuring that staff are competent for the roles allocated to them, and that there is a robust system in place for approving leaders and approving plans for activities and visits. Many of the day-to-day tasks associated with the responsibilities can be delegated to an EVC, depending upon their competence.</p>
Educational Visits Coordinator (EVC)	<p>It is good practice for all establishments to have an Educational Visits Coordinator (EVC), and the employer's policy may make this a requirement. In smaller establishments, the role of EVC is sometimes held by the Headteacher. Where an EVC is not nominated, by default the responsibilities of the role rest with the Headteacher. The EVC should work closely with the Headteacher and with Visit Leaders. The EVC should be an experienced Visit Leader with sufficient status within the school to guide the working practice of colleagues leading outdoor learning and visits. This cannot be a purely administrative role, although certain functions may be delegated to an administrator.</p>
Visit or Activity Leader (RQT or Above)	<p>A Visit Leader is the person who has overall responsibility for managing a visit, including for the health and safety of participants and staff, and the supervision, welfare, learning and development of the participants. They should work closely with the EVC when planning a visit, and are responsible for deploying the Activity Leaders during a visit. An Activity Leader is responsible for the management of a group (or subgroup) taking part in a specific activity within a visit, including for their supervision, health, safety, welfare, learning and development. They are responsible to the Visit Leader.</p>
Assistant visit or activity leader	<p>An Assistant Leader supports the Visit Leader or an Activity Leader, and may be required to take over from them if necessary.</p>
Volunteer Adult Helper	<p>A helper is a person who has an agreed role during a visit, but who is not a Visit Leader, Assistant Leader, Activity Leader or participant. A Helper might be: an inexperienced member of staff; a parent; an apprentice, student or trainee; a carer.</p>

5.4. Refer to the following responsibility checklists [APPENDIX 1](#) of this policy for further information.

## 6. Ensuring Understanding of Basic Requirements

- 6.1. Learn-AT is required to ensure that its employees are provided with:
- appropriate guidance (this policy and OEAP National Guidance website) relating to 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
- 6.2. Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their Educational Visits Coordinator (EVC).

## 7. Leader Competence

- 7.1. To be deemed competent, a school 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.
- 7.2. [OEAP National Guidance](#) sets a clear standard to which school/academy leaders must work. The guidance states that 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
  - knowledge and understanding of school procedures supported by a structured induction process
  - 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
- 7.3. 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. Where newly qualified teaching staff are organising a trip, it is essential that they are supported in the planning, risk assessing and leading of the visit. They should be accompanied by an experienced teacher or member or SLT when leading trips in their NQT year.
- 7.4. Establishments should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies.
- 7.5. Where a Volunteer Helper is a parent (or otherwise in a close relationship to 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. Volunteers should also be given a copy of [APPENDIX 2: Guidance for Volunteers on a school trip](#) prior to the trip taking place so that they can ask any questions about their role on the day of the trip in advance of the trip taking place.

## **8. Assessment of Leader Competence**

- 8.1. [OEAP National Guidance](#) provides clear advice regarding the assessment of leader competence. It is an expectation of schools that all 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.
- 8.2. The EVC and/or Head of establishment 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?
  - 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 school?
  - l) Is the leader aware of all relevant guidelines and able to act on these?

## **9. Educational Visit Planning**

- 9.1. Planning should reflect the consideration of legal and good practice requirements, ensuring:
- The plan is based on establishment procedures and employer 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.

9.2. Benefits of detailed planning include:

- The use of EVOLVE allows schools to have a central record of all visits
- When updated regularly, EVCs will have a full record of staff experience, which provides a database of evidence to support decisions on competence
- When updated regularly, the EVOLVE systems allows storage of a central record of staff qualifications
- The EVC is able to produce customised reports for the advisory board, 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

9.3. It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out an exercise 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.

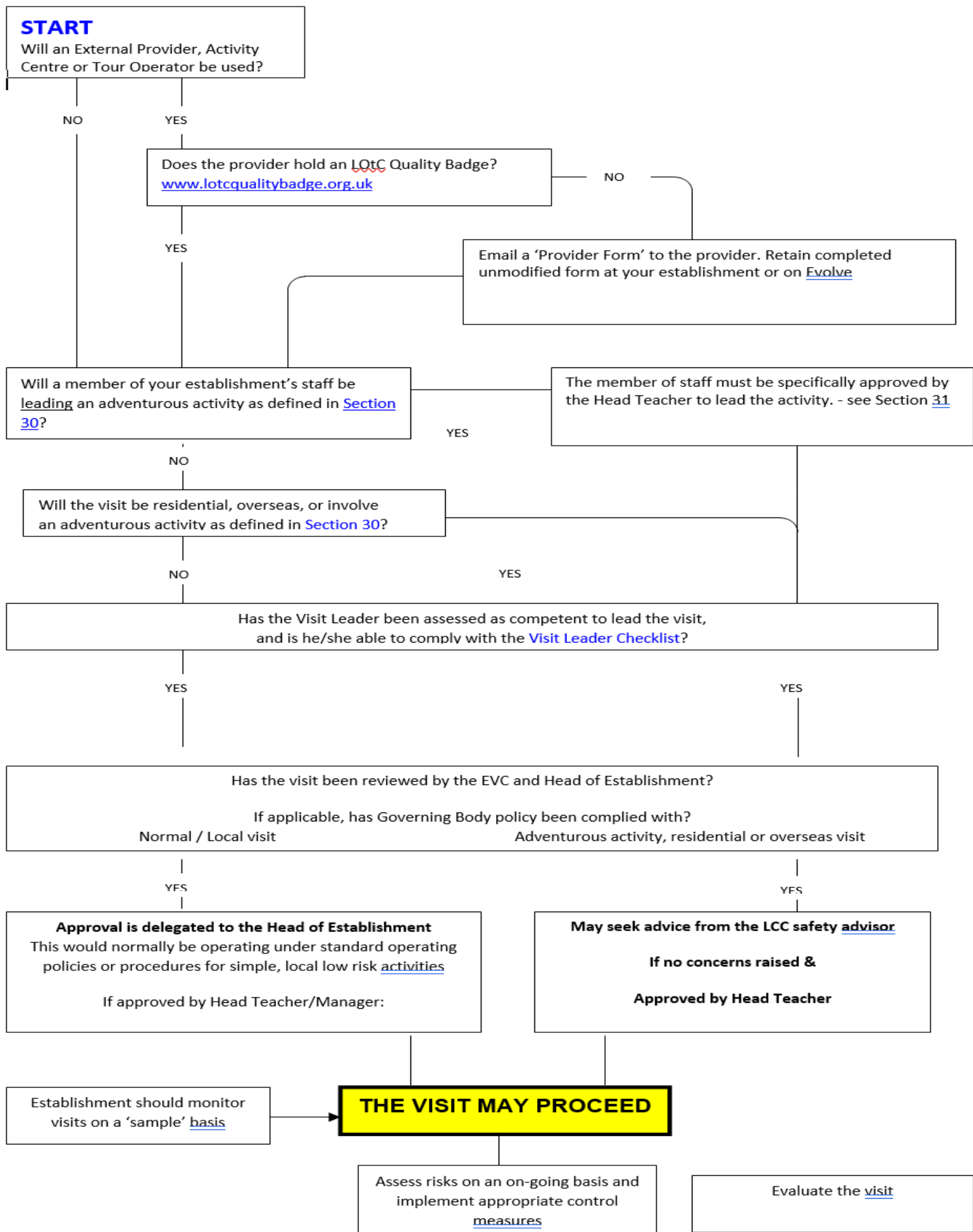
9.4. Schools need to take account of the legalities regarding a requirement for formal consent. When an activity is part of a planned curriculum in normal curriculum time and no parental contributions are requested, then a formal consent is not necessary. However, in the interests of good relations between school and parents, it is good practice to ensure that those in a position of parental responsibility are fully informed.

9.5. In order to ascertain how complex a particular plan could be, several variables will be considered for any given activity. These variables can be remembered as "**SAGED**" as explained below:

- **S**taffing requirements – trained? Experienced? Competent? Ratios?
- **A**ctivity characteristics – start? finish? possible delays? Connections? 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 school, transport? Residential?

9.6. The following flow diagram can be used to help to ascertain the activities required when planning, leading and evaluating an educational visit. The use of the EVOLVE system allows Visit Leaders and EVCs to follow this process and ensure that all stages of

the visit plan have been communicated effectively to all stakeholders and allows for visit planning processes to be stored effectively.



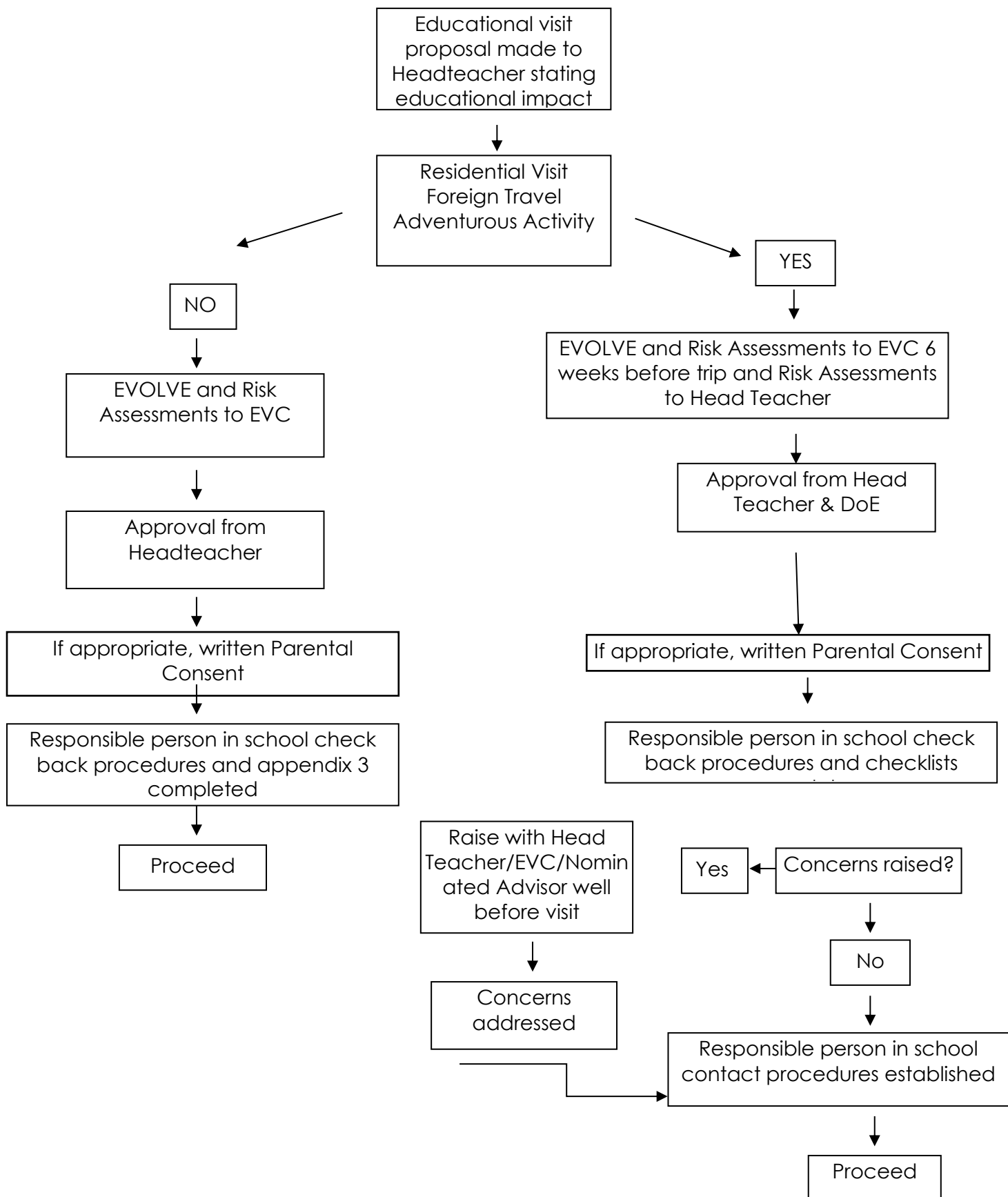
## 10. Notification of Activities and Visits

- 10.1. Learn-AT uses the EVOLVE system for notifying the EVC of a forthcoming educational visit. It is the Headteacher's responsibility to ensure that the EVOLVE system contains current staffing lists, templates and risk assessment templates for the visit leader to complete.
- 10.2. [APPENDIX 3 \(a\)](#) outlines the process for coordinating a visit (day trip) and [APPENDIX 3 \(b\)](#) the process for residential visits from the planning stage to after the visit has taken place.
- 10.3. The Headteacher is responsible for authorising off-site visits and activities organised by the school. However, if the visit involves an overnight stay (residential), or activities are deemed more adventurous (see section 25) additional checks will need to be completed by the Health Safety and Wellbeing service with final approval from the Director of Education Education.
- 10.4. If approval is required from the Director of Education, the Evolve form must be completed and submitted 6 weeks prior to the visit taking place.**
- 10.5. All visits/activities are authorised by the Headteacher on behalf of the school. All such visits must be notified to the Headteacher well in advance and an acknowledgement received, leaders must be in receipt of this prior to departure. Failure to do so for school/academy employees would constitute a disciplinary offence.**
- 10.6. Headteachers and EVCs 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.

10.7. Suggested timing for a regular activity:

Activity	Timing
Proposal for trip, including educational rationale, is sent to Headteacher for approval	12 weeks prior to the trip commencing
Visit Leader coordinates with office team to plan the trip and organise transport, staffing and logistics	11 weeks prior to the trip commencing
Risk Assessment Pre-Visit takes place	6 weeks prior to the trip commencing
Risk Assessment is written and shared with EVC (via EVOLVE)	5 weeks prior to the trip commencing
Risk Assessment is evaluated by EVC and feedback given for adjustments to be made	3 weeks prior to the trip commencing
Final Risk Assessment is submitted to EVC	2 weeks prior to the trip commencing
Final Risk Assessment and visit itinerary is shared with all adults attending the trip and Risk Assessment is signed by all adults	Day of the trip
Evaluation of the Trip is added to EVOLVE system along with signed copies of the Risk Assessment	1 week after the trip has taken place

## 11. School Visits Notification Route



## 12. Risk Management

- 12.1. Learn-AT has a legal duty to ensure that risks are managed to ensure that the risks are reduced to an acceptable or tolerable level but are not totally eliminated. Risk management systems should be in place to provide training and resources as is necessary to implement this policy.
- 12.2. The risk management of an activity should be informed by the benefits to be gained from participating. Learn-AT uses a Risk-Benefit Assessment approach, whereby the starting point for any risk assessment should be the consideration of the benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk is 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.
- 12.3. There is a legal requirement for the risk assessment 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. Staff should follow school guidelines for completing risk assessments and use [APPENDIX 4](#) template risk assessment format when completing their risk assessment.
- 12.4. On completing any risk assessments, Learn-AT should ensure that the documents are signed and dated appropriately and accompanying staff are made aware of the outcomes of the risk assessment. All signed risk assessments should also be scanned as PDFs and added to the EVOLVE system for long term storage and auditing processes.
- 12.5. Visits that include adventurous activity commonly involve delivery by an external provider (see Section 21) and the provider will have responsibility for risk assessing and managing the activity. As such, the provider's risk assessment is not the concern of the establishment leader and does not need to be requested from the provider.
- 12.6. 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.
- 12.7. 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.
- 12.8. This is endorsed by HSE in [Principles of Sensible Risk Management](#) and reference to [OEAP National Guidance](#) should be made to support your training and quality assurance of Risk Assessments.

## 13. Preliminary Visits and Provider Assurances

- 13.1. 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.

13.2.

13.3. 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.

13.4. It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

13.5. Examples of such schemes include:

- The LOtC Quality Badge
- AALS licensing
- Adventure mark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

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

14.1. Employer's Liability Insurance is a statutory requirement, and the school should check that it holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. The school should check that it 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. 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.

14.2. The school should also check that some level of Personal Accident Insurance is provided for all school employees in the course of their employment, providing predetermined benefits in the event of an accident.

14.3. School Visit and Activity leaders should contact their Insurance Provider 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.

14.4. Appropriate insurance must be in place for all visits.

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

15.1. 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

- 15.2. As an employer, Learn-AT is committed to providing emergency planning procedures to support their schools in the event of a critical incident.
- 15.3. Support from school senior leaders will be available when a crisis occurs. The school will ensure appropriate and up to date mobile contacts are listed in [Appendix 5](#) so Visit Leaders can seek advice and assistance as required. The Director of Education and Trust Leader will also be kept informed as part of the Crisis Management Team of the local school Emergency Planning and Recovery document.
- 15.4. It will also be important for Visit Leaders to have the contact details of key staff from the organisation on their trip with them. They should have a copy of Emergency Procedures ([APPENDIX 5](#)) with them at all times and use the checklist for procedures if they find themselves in an emergency situation. The action log will prove crucial during and after the event to ensure that procedures were followed in a timely and sensible manner.
- 15.5. Emergency contact 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.

## 16. Monitoring

- 16.1. Learn-AT Trust ensures that there is sample monitoring of the visits and Outdoor Learning activities undertaken by schools. Such monitoring should be in keeping with the recommendations of [OEAP National Guidance](#).

## 17. Requirement to Ensure Effective Supervision

- 17.1. 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 to be the same as they would be within the school environment:

Age of children	Number of staff
Children under 2 years old	At least one member of staff for every 3 children
Children aged 2	At least one member of staff for every 4 children
Children aged 3 and over	Where a person with Qualified Teacher Status (QTS), Early Years Professional Status (EYPS), Early Years Teacher Status (EYTS) or another suitable level 6 qualification, an instructor or a suitably qualified overseas trained teacher is working directly with the children:

	If the majority of children will reach the age of 5 or older within the school year, there must be at least one member of staff for every 30 children. If not, there must be at least one member of staff for every 13 children. Where there is no person with the qualifications mentioned above, there must be at least one member of staff for every 8 children
Children in F2	At least one school teacher for every 30 children & there must be at least one member of staff for every 6 children
Years 1 to 3	A ratio of 1:8 (1 adult to 6 children)
Years 4 to 6	A ratio of 1:10 - 15 (1 adult to 10 - 15 children)

- 17.2. Effective supervision should be determined by 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.
- 17.3. A visit must not go ahead where either the visit leader, EVC, or Headteacher is not satisfied that an appropriate level of supervision exists.
- 17.4. 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.
- 17.5. 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.
- 17.6. More information on ratios can be found in [APPENDIX 6](#).

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

- 18.1. 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

- 18.2. Headteachers 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.**
- 18.3. **The Headteacher must specifically check if insurance cover is in place for the child/children concerned.**

## 19. Vetting and DBS Checks

- 19.1. 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.
- 19.2. 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 month or overnight
- 19.3. However, 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.
- 19.4. The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that an overview based on a common sense risk-benefit assessment process has been considered.

## 20. Parent / Carer Consent

- 20.1. Section 35 of the Education Act 2004 states: 'Where a visit is part of a planned curriculum in normal curriculum time, then parental consent is not necessary although it is recommended good practice to ensure that parents are informed'. DfE Guidance issued in 2013 states:

*"Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required. Written consent is usually only requested for activities that need a higher level of risk management or those that take place outside school hours. The Department has prepared a "one-off" consent form which schools can ask parents to sign when a child enrolls at the school. This will cover a child's participation in any of these types of activities throughout their time at the school. These include adventure activities, off-site sporting fixtures outside the school day, residential visits and all off-site activities for nursery schools which take place at any*

*time (including during school holidays or at the weekend). The form is available via the Evolve website – resources section."*

- 20.2. Parents must be told in advance of each activity and must be given the opportunity to withdraw their child from any particular school trip or activity covered by the form."
- 20.3. This guidance recommends that establishments continue to be use specific consent forms for more complex visits.

## **21. Inclusion**

- 21.1. 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.
- 21.2. Establishments 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
- 21.3. Employers, Headteachers/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.
- 21.4. 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.

## **22. Levels of Supervision for SEND Pupils**

- 22.1. Supporting participants with special needs or disabilities on visits may require additional staffing to provide effective supervision. Schools must not pass on the cost of additional staff to the young people who require it or to their parents, but the costs can be shared by the whole group through the visit funding arrangements.
- 22.2. The following factors should be considered when determining staffing requirements:
- The need to administer medication
  - The need for a member of staff to accompany a participant to the toilet
  - Any heightened likelihood of a participant absconding
  - The likelihood of a medical emergency arising

- The way in which being away from the normal setting will affect behaviour. For example, some young people have unpredictable fears and phobias that will be more difficult to cope with out of their normal environment.
- The risk of violence/assault and therefore the need for skills in de-escalation and positive handling.
- The need for manual handling of participants.
- The need for flexibility for staff working on a 1:1 basis to take a break

22.3. Where a member of staff is needed to supervise or care for an individual participant, they should not be considered to be part of the overall staffing ratio, as their role will be focussed on their charge's wellbeing, not on the wider supervision needs of the group.

22.4. If a member of staff is driving a minibus, they will not be able to supervise passengers, nor deal with any emergencies. If participants need supervision while travelling, you should ensure that sufficient staff are available.

## **23. Charges for Off-site Activities and Visits**

23.1. Headteachers/Managers, Curriculum Planners, EVCs 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.

## **24. Voluntary Contributions**

24.1. The restrictions on charging for activities during a school day do not prohibit a school from seeking voluntary contributions in support of an activity or visit. Such contributions must, however, be genuinely voluntary. Consequently, it must be made clear to parents that there is no obligation to contribute, and students must not be treated differently according to whether or not their parents have made any contribution. The policy on allocating places for such a visit must be clear at the outset.

24.2.

24.3. It is important to provide written information to parents. This should explain the nature of the proposed activity or visit, the likely value in educational terms and the financial contribution per student which would be required if the activity were to take place. The information should emphasise that there is no obligation to contribute and that no student will be excluded because parents are unwilling or unable to contribute. However, it must be made equally clear whether the activity or visit is likely to be cancelled if there are insufficient contributions. There is no limit to the level of voluntary contribution, nor is there any restriction on the way in which such contributions may be used. Thus voluntary contributions may be used to subsidise students of lesser means and to pay the travel and accommodation costs of accompanying teachers.

24.4. Summary of Permissible Charges

24.5. The extent to which charges may be levied is dependent upon the answers to the following questions:

- Is the activity or visit regarded as a statutory requirement?
- Is the activity or visit to be held in school time?

24.6. If the answer to either question is yes, the only charges that may be levied relate to the cost of board and lodging. No charges may be levied for either the travel or the educational activities. If the answer to both questions is no, the activity or visit is an "optional extra" and the full cost may be levied. However, any charge made in respect of individual pupils must not exceed the actual cost of providing the activity or visit, divided equally by the number of pupils participating. It must not therefore include an element of subsidy for any other pupils wishing to participate whose parents are unwilling or unable to pay the full charge.

## **25. First Aid**

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

25.2. 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.

25.3. Competence may be recognised by prior knowledge and experience, or, preferably, as a result of formal training. 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.

25.4. For children in EYFS, a staff member who has completed the paediatric first aid training accompany children on a educational visit.

25.5. 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 one of the HSE approved first aid courses designed to train people to cope with first aid situations in the outdoor environment.

25.6. 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 school staff to hold a qualification.

## 26. Using an External Provider

- 26.1. 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
  - 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
- 26.2. For the purposes of school approval, an External Provider is NOT:-
- a Campsite
  - Museums, galleries, etc.
  - Tourist attractions
  - Theme Park
  - Farm
  - a Coach, Train, or Airline company
  - a Swimming Pool
  - a Climbing Wall where instruction is provided by a member of your establishment.

## 27. Transport

- 27.1. 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 and establishments must follow any specialist guidance provided in the school transport procedures, if applicable. All national and local regulatory requirements must be followed.
- 27.2. 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.
- 27.3. Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.
- 27.4. Refer to OEAP National Guidance document: ["Transport: General Considerations"](#)
- 27.5. Refer to OEAP National Guidance document: ["Transport in Private Cars"](#)

## 28. Emergency Procedures

- 28.1. Staff involved in a visit must be aware of and adhere to their establishment's policy on emergency procedures ([APPENDIX 5](#)). For visits that take place outside normal establishment hours the emergency telephone number directory must be completed and be with the Visit Leader at all times.

## 29. Accident and Incident Reporting

- 29.1. Establishment managers must ensure they meet the requirements of the RIDDOR regulations and good practice. Refer to school procedures and forms. Accidents are reported via the AssessNET system.

## 30. Specific types of visit

### Farm Visits

- 30.1. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken. For more information refer to:
- Farming & Countryside Education: [www.face-online.org.uk](http://www.face-online.org.uk).
  - Refer to **OEAP National Guidance** document: [Farm Visits](#)

### Water Margin Activities

- 30.2. 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 (below knee height) water. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment, or water-going craft. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.**
- 30.3. From the outset the establishment must decide whether the activity:
- a) Falls within the definition in bold above - in which case the guidance in this section (ii) applies,  
Or
  - b) Exceeds the definition in bold above - in which case this is a water-based adventurous activity and [section iii](#) below applies.
- 30.4. All staff involved in water-margin activities should have a clear understanding of the guidance contained within [Group Safety at Water Margins](#). This document must be made available to all supervising adults in advance of the visit.
- 30.5. 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. The leader must have previous relevant experience and must have been assessed as competent to lead the activity by the Headteacher.

### Water-Based Activities

- 30.6. Learn-AT 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.



- 30.7. The following are not regarded as adventurous activities:
- Swimming in publicly lifeguarded pools – see [section iv.](#)
  - Water-margin activities as defined in [section ii.](#)
  - Use of commercial craft, tourist boat trips and similar activities for which young people would not normally wear personal buoyancy.
- 30.8. With the exception of the above, all other forms of water-based activities are regarded as adventurous activities.
- 30.9. The responsibility for the safety of participants in an adventurous activity will rest with either:
- a) An external provider. The provider must hold a [LOtC Quality Badge](#) or complete a [Provider Form](#) (even if they have other accreditation but not a [LOtC Quality Badge](#))
- 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 establishment's staff.** – (see [Section 31](#) and for further details on adventure activities refer to the OEA for advice). This person must be specifically approved by the school to lead the activity
- 30.10. 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.
- 30.11. 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.
- 30.12. Personal buoyancy conforming to the appropriate National Governing Body must be worn at all times by all participants in water-based activities, except, at the discretion of the activity leader, where the activity:
- takes place in a swimming pool, or
  - is 'swimming', or
  - is an activity for which personal buoyancy would not normally be worn by young people

## Swimming

- 30.13. Learn-AT 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.

- 30.14. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.
- 30.15. 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.
- 30.16. 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):**

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

## **31. Residential Visits**

- 31.1. Learn-AT 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.

## **32. Residential Providers**

- 32.1. 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 safety risk assessment and / or advice has been sought from a fire officer and implemented. If abroad, the accommodation must comply with fire, health and safety regulations which apply in the country concerned.

- 32.2. Some residential providers may hold a LOTC Quality Badge. If not, it may be helpful to use the Provider Form ([APPENDIX 7](#)) to gather this information (and retain evidence). Alternatively, you could carry out a pre-visit and take a checklist.
- 32.3. The decision about the use of an external provider is the responsibility of the visit leader, EVC and Head of establishment. 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.
- 32.4. To confirm that all aspects of the operation of the provider are satisfactory, the establishment must ensure that either:
- a) The Provider holds an LOTC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)  
Or
  - b) A '[Provider Form](#)' has been satisfactorily completed by the provider.

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

### 33. For Providers that hold an LOTC Quality Badge

- 33.1. Check that the provider's Quality Badge will be valid on the date of your visit ([click here](#)). Staff must ensure the provider has at least **£5 million public liability**. 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.

### 34. For Providers that do not hold an LOTC Quality Badge:

- Use the Provider Form template in the [APPENDIX 7](#) of this policy or from the Evolve website – resources section.
- Complete the top section
- Send Provider Form to the provider (email/ post)
- On its return check that it has been satisfactorily completed
- Keep Provider Form on file together with all other relevant documentation and upload a copy to Evolve.

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

- 34.2. 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 Health, Safety and Wellbeing Team prior to making a commitment with the Provider.
- 34.3. The satisfactory completion of an Provider Form does not necessarily signify that the service on offer will be appropriate for the young people from your establishment. A pre-visit and recommendation from previous users will help you decide on its suitability.
- 34.4. 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 8](#)

### 35. Supervision on Residential Visits

- 35.1. 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 Headteacher and DBS checked in accordance with employer guidance.
- 35.2. In Primary Schools where children are under 7 years of age, it may be acceptable for female teachers only to accompany mixed parties provided the DoPE, Headteacher, parents and staff involved are satisfied that this is an appropriate arrangement.
- 35.3. School 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.
- 35.4. The **school must 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.
- 35.5. Headteachers, 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 Provider Form

## 36. Non-prescription medicines and residential visits

- 36.1. School 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 they are 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.
- 36.2. However this approach may be inappropriate on a residential visit. If a child develops toothache during the night for example, 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.
- 36.3. 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 them 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 Headteacher 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](#))*

- 36.4. It must be emphasised that the group leader would take this role on a voluntary basis. Schools should clarify their approach to non-prescribed medicines with parents and obtain parental consent for providing non-prescription medicines. Alternatively, this could be incorporated into the main consent form for the visit.

## 37. Overseas Visits

- 37.1. Learn-AT 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.
- 37.2. **For all visits** it is essential that consideration is given to the following:

- Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- Transport systems have been assessed as safe for use.
- Advice should be sought regarding the need for inoculations (or other treatment) to be taken as a precautionary measure prior to the visit.

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

### **38. Organising your own visit**

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

38.2. Under The Package Travel, Package Holidays and Package Tours Regulations 1992, schools/academies 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.

38.3. 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.

38.4. These regulations impose obligations and liabilities on the "re-organiser" or "other party to the contract" in the case of package travel. Schools 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. Schools 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. Schools are therefore advised generally to organise ski visits through bonded tour operators. For schools making their own accounts under the control of a trustee may be the only realistic option.

## 39. Overseas Expeditions

- 39.1. 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.
- 39.2. There are stringent requirements on Overseas Expedition providers, and establishments may therefore need to allow up to 18 months for internal scrutiny to be completed.
- 39.3. Overseas Expeditions should only be approved by the Headteacher if the provider either:
- Holds an LOtC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) **or**
  - Provides a statement of compliance with [Guidance for Overseas Expeditions, Edition 3](#)
- 39.4. The contract for the expedition **must** be with the school not direct with parents.
- 39.5.
- 39.6. For providers that do not hold a LOtC Quality Badge, 'Guidance for Overseas Expeditions, Edition 3' should be referred to when the proposal is initiated. This document contains information for both establishments and providers and includes a checklist of vital aspects that must be considered prior to the establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.
- 39.7. When planning an expedition and selecting a provider, establishments should particularly consider the educational aims of the venture, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met.

**Best practice is that visit leaders attend the one day course entitled 'Overseas Expeditions Fieldwork Course organised by the Royal Geographical Society [www.rgs.org/eac](http://www.rgs.org/eac)**

## 40. Exchange Visits

- 40.1. Learn-AT has adopted the OEAP National Guidance document: [Young People's Exchange Visits](#) on the OEAP NG website section 7f. School staff are required to adhere to all relevant aspects of this guidance when organising exchange visits and homestays.
- 40.2. Please note that DBS checks may be required for host families in the UK – but host families 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 documents
  - Overseas Expeditions: refer to [APPENDIX 8](#)
  - See also EVOLVE, National Library, 'other documents' section for templates

## 41. Weather and Clothing

- 41.1. Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice.
- 41.2. 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
- 41.3. 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)
- 41.4. It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

## 42. Adventure Activities Licensing Regulations

- 42.1. Headteachers, EVCs and Visit Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.
- 42.2. 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).
- 42.3. 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.
- 42.4. 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 2004](#)".
- 42.5. Leaders should be aware that the AALS license is an assurance of safety. It does not accredit educational or activity quality.



42.6. Regulations surrounding academies are complex so staff should contact the Health, Safety and Wellbeing Team before organising potentially In-scope activities. Refer to LOTC National Guidance document: [AALA Licensing](#)

### 43. Definition of an 'Adventurous Activity'

43.1. The following activities are regarded as 'adventurous':

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

43.2. **'Open country'** is normally defined as land above 300m, or more than 1.5 km (30 mins) from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate.

43.3.

43.4. The following activities are not regarded as 'adventurous'. However, these activities must be supervised by a member of staff who has previous relevant experience and who in the opinion of the EVC and Headteacher is competent to supervise the activity:

- Walking in parks or on non-remote country paths
- Field studies - unless in the environments stated in 'open country'
- Swimming in publicly lifeguarded pools
- Theme parks
- Tourist attractions (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](#)

43.5. There are a number of activities, which are not currently covered by school insurance and cannot, therefore be undertaken:

- Paint Balling
- Air Sports – paragliding, parascending, gliding, parachuting

## 44. Responsibilities and Qualifications

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

- a) An external provider: The provider must hold a [LOtC Quality Badge](#) or complete an Provider Form. (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. This person must be specifically approved by the school/academy to lead the activity.

For further details on adventure activities refer to [APPENDIX 8](#)

44.2. In [APPENDIX 8](#) of this document the appropriate qualification for an instructor is given for each activity. Teachers who provide these activities to young people on roll of their own school are not required to be licensed by AALA but the same standards will be applied and they will need to hold relevant National Governing Body qualifications outlined in [APPENDIX 8](#) of this document. Non possession of such an NGB award may be for a variety of reasons, therefore it does not necessarily mean such a person is not able to take such an activity. If the school is leading an adventure activity such as canoeing, the Headteacher must ensure that the group leader and other supervisors are suitably competent to lead or instruct pupils in the activity.

## 45. Criteria for Approval

45.1. 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.

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

45.3. Internal approval within the school will always be subject to a requirement that the leader must act at all times within the remit of their qualifications, and in accordance with National Governing Body Guidelines where these exist. Reference to the other aspects of the visit such as general management and supervision skills, the risk assessment should also be taken into consideration.

## **46. APPENDICES**

Appendix 1: Roles and Responsibilities

Appendix 2: Guidance for Volunteers on a Trip

Appendix 3: Trip process guidance

Appendix 4: Risk Assessment Template

Appendix 5: Emergency Procedures

Appendix 6: Ratios Guidance

Appendix 7: Provider Form template

Appendix 8: Further information on Outdoor and adventurous activities

## Appendix 1: Guidance for Roles and Responsibilities

### Visit Leader Roles and Responsibilities

All leaders have a legal duty of care and must comply with their employer's policy and guidance. The **Visit Leader** has overall responsibility for a visit. This includes the learning, development and supervision of the participants and the safety of all, including any other leaders and helpers. An Activity Leader is responsible for one or more specific activities during a visit. During some visits, all the participants remain in one group. The **Visit Leader** might act as Activity Leader for all activities during the visit, or hand over leadership of one or more activities to an Activity Leader or third-party provider, while retaining oversight.

During other visits, the group splits into smaller groups for some activities. In this case, the **Visit Leader** hands over the leadership of one or more activity groups to an Activity Leader or third-party provider, while retaining oversight of the whole visit and perhaps acting as an Activity Leader for one group.

Planning for a visit should include consideration of the possibility of the **Visit Leader or an Activity Leader** becoming incapacitated. This might be caused by illness, injury, personal issues or being required elsewhere (such as to look after a sick child). Consideration of the **SAGE** variables (Staffing, Activity, Group and Environment) should lead to an appropriate decision on both the number of leaders as well as the mix of competence needed to fill various roles

Plans could include, for example:

- The group is accompanied by an Assistant Leader who is fully competent to take over and deputise for the incapacitated Visit Leader or Activity Leader;
- The group is accompanied by an Assistant Leader or Helper, who is sufficiently competent to abandon the visit or activity and supervise the group safely back to base (or who could supervise the group until support from the establishment can arrive);
- A backup leader is available back at the establishment, who is able to join the group at short notice;
- No other responsible adult is present, but the participants are judged sufficiently responsible and competent to deal with such a situation.

If you are designated as the **Visit Leader**, you should:

- Be able to use the chosen environment or venue(s) to provide a wide range of learning or development outcomes;
- Liaise with your establishment's Educational Visits Co-ordinator (EVC) to ensure that the visit has clear aims and is planned to appropriately balance benefits and risks, and that all leaders and helpers accompanying the visit meet establishment requirements;
- Ensure that there is effective supervision;
- Take a lead on risk management;
- Define the roles and responsibilities of other leaders and helpers (and participants) to ensure effective supervision throughout the visit, appointing a deputy wherever possible;
- Ensure that any Activity Leaders are competent and confident to lead their planned activities, and are approved to do so if this is necessary (e.g. for adventure activities);
- Ensure that child protection issues are addressed (e.g. good safeguarding practice is followed and adults are appropriately vetted and checked);
- Provide relevant information to other leaders including the aims and how they can contribute to achieving these, the location, the participants (age, health information, capabilities, special needs, safeguarding and behavioural issues);
- Ensure that informed parental consent has been obtained as necessary;

- Provide relevant information to parents and participants, and arrange pre-visit information meetings where appropriate;
- Make sure there is access to first aid at an appropriate level;
- Ensure that if the visit leadership team includes someone with a close relationship to a member of the group, this is managed to avoid any possible compromise of effective supervision;
- Ensure that all leaders and any third party providers have access to emergency contact and emergency procedure details;
- Review all aspects of the visit, both during and after the event;
- Liaise with your EVC about evaluation of the visit;
- Report any accidents, incidents or near misses.

### **Assistant Visit Leader Roles and Responsibilities**

All leaders, including **Assistant Leaders**, have a legal duty of care and must comply with their employer's policy and guidance. If you are an Assistant Leader, you must be specifically competent to carry out that role. This means that you must be given clarity about what is expected of you.

Typical expectations of an **Assistant Leader** can include one or more of the following:

- Developing your experience and competence.
- Contributing to supervision.
- Supporting Activity Leaders during specified activities, with your responsibilities depending upon your competence in the particular activity.
- Supporting the Visit Leader with agreed aspects of the visit.
- Acting as deputy for a Visit Leader or Activity Leader.
- If your role includes an expectation that you will act as a deputy for a Visit or Activity Leader, or as an Activity Leader for specified activities, you should have the level of competence required for that role.

As an **Assistant Leader**, you should:

- Be sufficiently competent and confident that if the Visit or Activity Leader is incapacitated you can take over and ensure the safety of the group.
- Know and understand establishment and employer policies/procedures, in so far as they affect the responsibilities you have been assigned.
- Be meaningfully involved in the planning and preparation for the activity/visit, including contributing to the organisation of risk management.
- Ensure that you understand the role and responsibilities that you have been assigned and how you work alongside other staff and the Activity/Visit Leader.
- Be clear about any arrangements to hand-over and hand-back responsibility for supervision between members of staff and to/from any third-party provider.
- Ensure that you and other staff have been briefed on:
  - The young people, including age, health characteristics, capabilities, special educational needs, behaviour and any other information that is relevant.
  - The nature and location of the activity.
- Contribute to the ongoing monitoring of the activity/visit, including the quality of any activities provided by a third-party provider.
- Contribute to the evaluation of the activity/visit.

### **Helper Roles and Responsibilities**

A **Helper** is an adult who has an agreed role during a Visit, but who is not a Visit Leader, Assistant Leader, Activity Leader or Participant. For example, a Helper might be: an inexperienced member of staff; a Parent; an apprentice, student or trainee; or a carer. Any child or young person in a helping role should be regarded as a Participant.

Establishments must ensure that any **Helpers** are subject to an appropriate vetting decision by Heads/Managers and are used appropriately (not as a replacement where an Assistant Leader is required). **Helpers** should be suitably competent and confident to carry out their role and briefed appropriately about relevant establishment procedures so as to be able to carry out the duties they are assigned (e.g. whether they will work independently or be under supervision). The details of the engagement process may depend upon whether the Helper is employed, contracted or acts as a volunteer, but in all cases should be appropriate and thorough.

If you are a Parent of a young person taking part in the visit, you must be aware of the potential for your parental instincts to compromise the Visit Leader's plans for group management, particularly if there is a serious incident - where you may be distracted by the needs of your own son or daughter, rather than looking to the needs of the whole group. This means that in most situations, unless it is an agreed part of the plan, the Visit Leader should avoid assigning to you a leadership role that gives you direct responsibility for your own child.

If you are a **Helper**, you should:

- Make sure you understand the role, responsibilities and limitations that you have been assigned and how these fit with other staff including the Visit Leader.
- Be competent and confident for the role and responsibilities that you have been assigned.
- Know about establishment and employer policies and procedures, insofar as they affect the responsibilities you have been assigned, and work within these.
- Ensure that you have been briefed about the nature and location of the visit and about the participants (including age, health information, capabilities, special needs, safeguarding and behavioural issues).
- Report any concerns you have during the visit to the Visit Leader/Assistant Leaders as soon as possible.
- Be prepared to contribute to the evaluation of all aspects of the visit, both during and after the event.

## Volunteer Roles and Responsibilities

When using **volunteers** it is essential that they meet the requirements for the role that they have been assigned (Visit Leader, Activity Leader, Assistant Leader, Helper). The engagement of any **volunteer** must involve an appropriate level of vetting and induction. They must be sufficiently competent and confident to carry out their responsibilities. The level of competence and the thoroughness of the engagement process depend upon the role that the volunteer is to take, and the degree to which they will be working independently or under supervision.

Where they are working independently it should be to the same standard as would be expected of an employee or contractor taking on the role.

Examples of how **volunteers** might be involved with visits include:

- A school asks an Advisory Board member or a Parent to join the Visit Leadership Team to help with supervision.
- A Parent helps with transport.
- A member of the community who is an activity specialist leads an Activity, or an entire Visit e.g. a member of a local orienteering club offers to run a school orienteering club and take groups to weekend events.
- A teacher's partner offers to accompany them and help with the school ski trip.

## Appendix 2: Guidance for Volunteers on a school trip

These guidance notes have been written in conjunction with EVOLVE. If you have **any questions** about a school trip, **please see the class teacher**. We do appreciate your help on school trips – it would be difficult to organise visits outside school without parent volunteers.

### Before the visit

- Risk assessments will have been completed by the trip leader (usually one of the class teachers) before the trip takes place. Please ensure that these have been discussed with you before you leave. You will be asked to sign to confirm that you have understood. This will help you to ensure that all the children, and yourself, remain safe throughout the day.
- The teacher will give parent helpers a list of children for whom they are responsible. Parents may not always have their own child in their group.
- All children are told that they must stay with their group and the group adult at all times.
- The class teacher sets and leads the rules, routines and expectations for the day, please make sure you listen to the teacher, so you know these too.
- Never be alone with a child.
- If you cannot make the visit, please phone the school by 8am or earlier so alternative cover can be made otherwise the trip will have to be cancelled.
- Make sure you have the phone number of the trip leader so that in an emergency you can contact them.

### Journeys

- If the trip involves a coach journey, please help the children in your group put on their seatbelts. Make sure that you sit with your group and help them if needed throughout the journey.
- Children are not allowed to eat or drink on the coaches.
- The class teacher has sick bucket/bags, if needed.
- Please help the teacher by ensuring your group follows all instructions e.g. when to eat and drink.

### Activities

- The class teachers will have organised activities for the children to take part in throughout the day. Most of our trips are about giving the children different experiences and opportunities, so please talk to the children about what they are doing and encourage them to discuss what they are finding out.
- Make sure that you are aware of the activities the visit will need you to be involved in so that you can dress appropriately (e.g. lots of walking will mean comfy shoes, muddy fields etc)

### Lunch / Food

- Please sit near to your group to eat your own lunch, and make sure that the children tidy away all their litter once finished.
- Remember to bring yourself a packed lunch. If you need to go and purchase your own lunch, please make sure that a member of staff is aware that you are going so they can ensure the children in your group are supervised appropriately.
- Never share your own food or drink with the children.
- Please do not bring any foods which contain nuts as we have children who have severe allergies.
- If children don't have their own lunch then please inform their class teacher.

### First Aid

- The class teacher is responsible for ALL first aid and medication.
- If there is a medical or other emergency, let the class teacher know immediately.
- The class teacher is responsible for contacting the school and associated parents in emergency situations.

### Toilet /Wellbeing

- Please let a member of staff know if any of the children in your group need the toilet and they will help and advise you. Never allow a child to go to the toilets, without a member of staff being present.
- If you need to leave your group for any reason, e.g. to go to the toilet, please inform another adult.

- If you do need to smoke please do so well away from, and out of sight of, the children. Please let a member of staff know that you are going so they can ensure the children in your group are supervised appropriately.

**Confidentiality**

- Do not take photos of the children on your own device such as mobile phone
- Please put your mobile phones on silent so that you are not distracted by phone calls or text messages during the trip.
- Parent volunteers are asked to keep the same degree of confidentiality on visits as in school. If you have any queries or problems concerning the trip, please direct these in the first instance to the class teacher, or if you would rather, the Headteacher on return from the trip.
- Never answer other parent's questions about a trip – always refer them to the class teacher.



## Appendix 3 (a): Trip Leader Day Trip / Sporting Fixture Check List

The Trip Leader should consider all of these points when organising an educational visit. All aspects (that are appropriate) should be completed to ensure the trip goes according to plan!

**Please ensure that all documents (including risk assessments, letter to parents, itinerary, route plan if walking) are uploaded to Evolve using timeframes below.**

Trip Destination:	
Date of Trip:	Class / Year Group:

<b>TRIP PLANNING: PRE - EVOLVE</b>		
<b>Before the Trip</b>		
<b>Action</b>	<b>Recommended timescales unless in red</b>	<b>Tick When completed</b>
Has provisional permission been sought from the Head?	At least ½ term in advance.	
If applicable: has a pre-visit been carried out, or has site otherwise been recently visited? Does the activity/centre hold LOTC status?	At least ½ term in advance.	
Has transport been provisionally booked? Only office staff can book a coach, they will do so if you give them the details.  If walking, has a route plan been decided on?	At least ½ term in advance.	
Has the activity/centre been provisionally booked?	At least ½ term in advance.	
Has an itinerary for the trip been drawn up with expected timings?	At least ½ term in advance.	
Has consideration been given to COVID and measures agreed to prevent potential transmission?	At least ½ term in advance.	
Has a letter, containing all important information been sent to parents? It should include all of the following. The office staff will help you with the letter if you give them the information:	At least 1 month in advance.	
<ul style="list-style-type: none"> <li>• Date, time and location</li> </ul>		
<ul style="list-style-type: none"> <li>• Rationale of trip - briefly, why are you going?</li> </ul>		
<ul style="list-style-type: none"> <li>• Details of main activities to be undertaken so that parents can give informed consent</li> </ul>		
<ul style="list-style-type: none"> <li>• Level of voluntary contribution expected and how to pay</li> </ul>		
<ul style="list-style-type: none"> <li>• Information about suitable clothing for activities to be undertaken. What are children expected to wear – school uniform? What footwear should be worn? Will they need sunscreen?</li> </ul>		
<ul style="list-style-type: none"> <li>• Information about lunch – do children need to bring a packed lunch for the journey or is food being provided? Do parents know that FSM/KS1 children are entitled to a free packed lunch provided by school?</li> </ul>		

<b>PLANNING: EVOLVE</b>		
This is the time to add the following information to Evolve. Trip information must be uploaded onto the Evolve system 4 weeks prior to the trip taking place to allow all appropriate personnel the time to check and agree the planning. Office staff with Evolve Admin Support status can help with this.	4 weeks prior to trip taking place (unless permission has been gained from the EVC to submit later)	
<ul style="list-style-type: none"> <li>Type of Visit</li> </ul>		
<ul style="list-style-type: none"> <li>Purpose</li> </ul>		
<ul style="list-style-type: none"> <li>Dates and Times</li> </ul>		
<ul style="list-style-type: none"> <li>Venue</li> </ul>		
<ul style="list-style-type: none"> <li>Travel Arrangements</li> </ul>		
<ul style="list-style-type: none"> <li>Have staff : pupil ratios been planned taking into account the level of supervision, age and number of pupils involved, special educational or medical needs, degree of responsibility and discipline shown by the group, type of visit and nature of the activities, level of risk, location and travel arrangements</li> </ul>		
<ul style="list-style-type: none"> <li>Risk Assessments and supporting documents (including Covid Measures)</li> </ul>		
<ul style="list-style-type: none"> <li><b>Has the EVC checked and approved the plan for the trip?</b></li> </ul>	<b>At least 2 weeks prior to trip taking place.</b>	
<ul style="list-style-type: none"> <li><b>Has the Headteacher checked and approved the plan for the trip?</b></li> </ul>	<b>At least 2 weeks prior to trip taking place.</b>	

<b>Pre-Visit</b>		
<b>Action</b>	Recommended timescales unless in red	Tick When completed
Has permission been granted for all children on the trip by the person with Parental Responsibility? Consider contacting parents in plenty of time to gather missing permissions – the office can provide extra copies of letters or send text reminders.	At least 48hrs before the trip.	
<ul style="list-style-type: none"> <li>Medical information</li> </ul>		
<ul style="list-style-type: none"> <li>Dietary requirements</li> </ul>		
<ul style="list-style-type: none"> <li>Emergency contact details</li> </ul>		
Has provision been made for children who are not expected to go on the trip?		
Have cover arrangements been made: e.g. Duties, First Aid, Lunchtimes	1 week before	
Have lunches been ordered from the school kitchens?	1 week before	
Have arrangements been made to collect the lunches and bring them to school? i.e. if meals are not cooked on site.		
<ul style="list-style-type: none"> <li>Have all staff on the trip been given a copy of 'Key Information for All Staff'?</li> </ul>	At least 24hrs before trip	
<ul style="list-style-type: none"> <li>Have they all signed the check list to confirm that they have read and understood?</li> </ul>		
<ul style="list-style-type: none"> <li>Have risk assessments for the trip been updated and shared, including:</li> <li>Event Specific notes (ESN) if applicable?</li> </ul>	At least 24hrs before the trip	

<ul style="list-style-type: none"> <li>• Covid Measures</li> </ul>		
<ul style="list-style-type: none"> <li>• Changes to travel, if applicable?</li> </ul>		
<ul style="list-style-type: none"> <li>• Emergency contacts/procedures?</li> </ul>		
<ul style="list-style-type: none"> <li>• Changes to any specific adventurous activities being undertaken?</li> </ul>		
<ul style="list-style-type: none"> <li>• Risk assessments for identified children? E.g. SEN, Behavioural</li> </ul>		
Have all volunteers/helpers going on the trip been given a copy of "Guidance for volunteers for school trips"?	At least 24 hours before the trip	
All adults that are going on the trip, staff and volunteers, need to be made aware of the risk assessments.	At least 24 hours before the trip	
Have all members of staff read the risk assessments and signed to confirm that they have?	least 24 hours before the trip	
Have all volunteers been briefed about the potential risks and signed to confirm that they have?	least 24 hours before the trip	

<b>On the Day</b>	
<b>Action</b>	<b>Completed?</b>
Have all volunteers been given the Information Sheet for on-Staff Volunteers? E.g. Trip leader phone number.	
Has the trip leader taken a mobile phone and is it fully charged?	
Does the trip leader know the emergency procedures? Eg. Crisis Line / Headteacher contact number, CEO contact number.	
Have all children been assigned to groups, and does each group leader know who their assigned children are, including any particular needs for that child?	
Have any children not going on the trip been taken to their temporary class for the day?	
Have the First Aid Kits been taken out?	
Have the medicines for specific children been collected? E.g prescribed medication/ travel sickness tablets.	
Have dietary needs been catered for?	
Have the following documents been given to the office? You will need to take a copy all of your documents with you including:	
<ul style="list-style-type: none"> <li>• Risk Assessments (including Covid RA's)</li> </ul>	
<ul style="list-style-type: none"> <li>• Risk Assessment check and sign sheet signed by all accompanying adults?</li> </ul>	
<ul style="list-style-type: none"> <li>• Emergency Contacts</li> </ul>	
<ul style="list-style-type: none"> <li>• Itinerary for the trip with expected timings</li> </ul>	
<ul style="list-style-type: none"> <li>• A copy of the registers detailing all accompanying children and adults</li> </ul>	
<ul style="list-style-type: none"> <li>• Group lists</li> </ul>	
<ul style="list-style-type: none"> <li>• Key Information sheet for all Staff to read</li> </ul>	
Complete the Evolve register for children present to actually go on the trip. This should be done before you leave.	

<b>After the Trip</b>	
<b>Action</b>	<b>Completed?</b>
Please complete the evaluation on Evolve to give feedback as to whether the trip was successful or not. Report any concerns you may have which would affect future visits e.g. seat belts not working on the bus, inadequate toilet facilities	

### Appendix 3 (b): Residential Trip Check List

The Trip Leader should consider all of these points when organising an educational visit. All aspects (that are appropriate) should be completed to ensure the trip goes according to plan!

**Please ensure that all documents (including risk assessments, letter to parents, itinerary, route plan) are uploaded to Evolve using timeframes below.**

Trip Destination:	
Date of Trip:	Class / Year Group:

#### RESIDENTIAL TRIP PLANNING: PRE - EVOLVE

##### Before the Trip

Action	Recommended timescales unless in red	Tick When completed
Has provisional permission been sought from the Head?	At least 1 year in advance.	
If applicable: has a pre-visit been carried out, or has site otherwise been recently visited? Does the activity/centre hold LOTC status?	At least 1 year in advance.	
Has transport been provisionally booked? Only office staff can book a coach, they will do so if you give them the details. If walking, has a route plan been decided on?	At least 1 year in advance.	
Has the activity/centre been provisionally booked?	At least 1 year in advance.	
Has consideration been given to COVID and measures agreed to prevent potential transmission?	At least ½ term in advance.	
Has an itinerary for the trip been drawn up with expected timings?	At least 1 year in advance.	
Has a letter, containing all important information been sent to parents? It should include all of the following. The office staff will help you with the letter if you give them the information:	At least 1 year in advance.	
<ul style="list-style-type: none"> <li>• Date, time and location</li> </ul>		
<ul style="list-style-type: none"> <li>• Rationale of trip - briefly, why are you going?</li> </ul>		
<ul style="list-style-type: none"> <li>• Details of main activities to be undertaken so that parents can give informed consent</li> </ul>		
<ul style="list-style-type: none"> <li>• Level of voluntary contribution expected and how to pay</li> </ul>		
<ul style="list-style-type: none"> <li>• Information about suitable clothing for activities to be undertaken. What are children expected to wear, including footwear etc. Will they need sunscreen?</li> </ul>		
<ul style="list-style-type: none"> <li>• Information about lunch – do children need to bring a packed lunch for the journey or is food being provided? Do parents know that FSM/KS1 children are entitled to a free packed lunch provided by school?</li> </ul>		

#### PLANNING: EVOLVE

This is the time to add the following information to Evolve. Trip information must be uploaded onto the Evolve system 12 weeks prior to	12 weeks prior to trip taking place
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the trip taking place to allow all appropriate personnel the time to check and agree the planning. Office staff with Evolve Admin Support status can help with this.		
<ul style="list-style-type: none"> <li>Type of Visit</li> </ul>		
<ul style="list-style-type: none"> <li>Purpose</li> </ul>		
<ul style="list-style-type: none"> <li>Dates and Times</li> </ul>		
<ul style="list-style-type: none"> <li>Venue</li> </ul>		
<ul style="list-style-type: none"> <li>Travel Arrangements</li> </ul>		
<ul style="list-style-type: none"> <li>Have staff : pupil ratios been planned taking into account the level of supervision, age and number of pupils involved, special educational or medical needs, degree of responsibility and discipline shown by the group, type of visit and nature of the activities, level of risk, location and travel arrangements</li> </ul>		
<ul style="list-style-type: none"> <li>Risk Assessments and supporting documents (including Covid RA's)</li> </ul>		
<ul style="list-style-type: none"> <li>Has the EVC checked and approved the plan for the trip?</li> </ul>	At least 8 weeks prior to trip taking place.	
<ul style="list-style-type: none"> <li>Has the Headteacher checked and approved the plan for the trip?</li> </ul>	At least 8 weeks prior to trip taking place.	
<ul style="list-style-type: none"> <li>If residential/ foreign or adventurous activity – has Leicestershire Traded Services given approval – made comment pre-sign off?</li> </ul>	6 weeks prior to trip taking place	
<ul style="list-style-type: none"> <li>If residential/ foreign or adventurous activity – has CEO given final approval?</li> </ul>	6 weeks prior to trip taking place	

### Pre-Visit

Action	Recommended timescales unless in red	Tick When completed
Has permission been granted for all children on the trip by the person with Parental Responsibility? Consider contacting parents in plenty of time to gather missing permissions – the office can provide extra copies of letters or send text reminders.	At least 48hrs before the trip.	
<ul style="list-style-type: none"> <li>Medical information</li> </ul>	Up to going	
<ul style="list-style-type: none"> <li>Dietary requirements</li> </ul>		
<ul style="list-style-type: none"> <li>Emergency contact details</li> </ul>		
<ul style="list-style-type: none"> <li>Doctor information</li> </ul>		
Has provision been made for children who are not expected to go on the trip?	At least 48 hours before the trip	
Have cover arrangements been made: e.g. Duties, First Aid, Lunchtimes	1 week before	
Have lunches been ordered from the school kitchens?	1 week before	
Have arrangements been made to collect the lunches and bring them to school? i.e. if meals are not cooked on site.	1 week before	
Have all staff on the trip been given a copy of 'Key Information for All Staff' ?	At least 24hrs before trip	
Have they all signed the check list to confirm that they have read and understood?	At least 24 hours before the trip	
Have risk assessments for the trip been updated and shared, including: <ul style="list-style-type: none"> <li>Event Specific notes (ESN) if applicable?</li> </ul>	At least 24hrs before the trip	

<ul style="list-style-type: none"> <li>• Covid measures</li> </ul>		
<ul style="list-style-type: none"> <li>• Changes to travel, if applicable?</li> </ul>		
<ul style="list-style-type: none"> <li>• Emergency contacts/procedures?</li> </ul>		
<ul style="list-style-type: none"> <li>• Changes to any specific adventurous activities being undertaken?</li> </ul>		
<ul style="list-style-type: none"> <li>• Risk assessments for identified children? E.g. SEN, Behavioural</li> </ul>		
Have all volunteers/helpers going on the trip been given a copy of "Guidance for volunteers for school trips"?	At least 24 hours before the trip	
All adults that are going on the trip, staff and volunteers, need to be made aware of the risk assessments.	At least 24 hours before the trip	
Have all members of staff read the risk assessments and signed to confirm that they have?	least 24 hours before the trip	
Have all volunteers been briefed about the potential risks and signed to confirm that they have?	least 24 hours before the trip	

<b>On the Day</b>	
<b>Action</b>	<b>Completed?</b>
Have all volunteers been given the Information Sheet for on-Staff Volunteers? E.g. Trip leader phone number.	
Has the trip leader taken a mobile phone and is it fully charged?	
Does the trip leader know the emergency procedures? Eg. Headteacher contact number, CEO contact number.	
Have all children been assigned to groups, and does each group leader know who their assigned children are, including any particular needs for that child?	
Have the First Aid Kits been taken out?	
Have the medicines for specific children been collected? E.g prescribed medication/ travel sickness tablets.	
Have dietary needs been catered for?	
Have the following documents been given to the office? You will need to take a copy all of your documents with you including:	
<ul style="list-style-type: none"> <li>• Risk Assessments? (Including Covid RA's)</li> </ul>	
<ul style="list-style-type: none"> <li>• Risk Assessment check and sign sheet signed by all accompanying adults?</li> </ul>	
<ul style="list-style-type: none"> <li>• Emergency Contacts.</li> </ul>	
<ul style="list-style-type: none"> <li>• Itinerary for the trip with expected timings?</li> </ul>	
<ul style="list-style-type: none"> <li>• A copy of the registers detailing all accompanying children and adults?</li> </ul>	
<ul style="list-style-type: none"> <li>• Group lists and room lists</li> </ul>	
<ul style="list-style-type: none"> <li>• Key Information for all Staff check and sign sheet?</li> </ul>	
Complete the Evolve register for children present to actually go on the trip. This should be done before you leave.	

<b>After the Trip</b>	
<b>Action</b>	<b>Completed?</b>
Please complete the evaluation on Evolve to give feedback as to whether the trip was successful or not. Report any concerns you may have which would affect future visits e.g. seat belts not working on the bus, inadequate toilet facilities	



## Appendix 4: Risk Assessment Template

# School Trip Risk Assessment Form

Organisation:		Trip Leader:	
Trip Venue: (Plus description of activities)		Date(s) of Trip:	
Assessor: (Signature)		Date Assessment Completed:	
Checked By: (Signature)		Date Assessment Checked:	

Significant Hazards List what could cause harm	Who Might be Harmed e.g. staff, children, certain groups	Likelihood of Harm Remote, Very Unlikely, Unlikely, Possible, Very Likely	Control Measures How will the risk be minimised?	Residual Risk After controls are implemented, (Remote to Very Likely scale)





## Appendix 5: Learn-AT Schools Emergency Procedures for Trips

# Emergency Procedures for Trips

Important: This document must be taken on all school trips

### HEALTH AND SAFETY INFORMATION FOR STAFF PROCEDURE FOR ACCIDENT OR ILLNESS

If a pupil has been injured or becomes ill, the following points should be considered: -

- The School cannot administer medicines unless written permission has been obtained from the parents in advance. If a pupil self-administers medication please ensure that they record their name, the time, type of medication, dose and amount taken.
- One of the School's qualified First-Aiders should be called to stabilise the child's condition and give advice. Care should be taken to avoid contact with blood etc. In such cases gloves must be used.
- Parents must be informed as soon as possible, even if the injury does not seem serious. This is particularly true of head injuries. Proper arrangements should be made to get the child home, if necessary. Parents must be contacted directly to inform them that their child has had a head or other significant injury or illness. All pupils must be given a copy of the First-Aid/Accident form to take home.
- In case of accident, details of the incident should be recorded as soon as possible e.g. members of staff present, pupils involved, potential witnesses; an accident report form must be completed and given to the Headteacher a.s.a.p.
- Pupils are not always the best people to judge if they are 'alright'. If in doubt an ambulance must be called. Teachers are in loco parentis and they will take a decision on treatment, rather than the pupil.

#### Activity/Visit leader's action card in the event of a major incident or accident whilst on a school visit

Immediate action in an emergency	Tick
Establish yourself as the person in charge. Assess the situation and take immediate action to ensure the safety of pupils and staff.	
Inform staff, volunteers and pupils that you will be responsible for communications. Staff, volunteers and pupils should be told to avoid talking to the media or spreading the story unnecessarily (particularly via use of mobile phones).	
Establish if anyone is injured and how. Administer any required First-Aid where possible.	
Call the emergency services if necessary. Try and get support so that you are not dealing with the incident on your own.	
Account for all members of the group. Ensure non-casualties stay together in a safe location.	
Be aware that you and others may be suffering from shock.	

Next steps	Tick
Contact the Headteacher or EVC.	
Please refer to attached emergency contact sheet in the event of any difficulty.	
Travel or allocate a suitable person to travel with any casualties to the hospital. Establish a contact point, if possible a member of staff should remain at incident site to liaise with emergency services.	
Give clear details of what has happened and who is involved. Please see attached sheet to assist you.	
Discuss with the Headteacher or EVC who should inform parents and next-of-kin or pupils and staff.	
The Headteacher or EVC should contact the Trust CEO on your behalf.	
Do not discuss the legal liability.	
Avoid speaking to the media – if necessary direct them to the EVC/Headteacher.	
Arrange or liaise with EVC/Headteacher for non-casualties to return to school.	
Make notes of what has happened and your actions. Obtain facts and clear information. Keep a record of witnesses. There is a log sheet attached to assist you.	
Keep in contact with the Headteacher or EVC and complete any required paperwork such as accident forms. In the event of a serious incident the EVC/Headteacher will need to report to HSE.	

### INCIDENT LOG SHEET FOR TRIP LEADERS

NATURE OF INCIDENT: \_\_\_\_\_

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

SHEET NO: \_\_\_\_\_

Time line of events to include: Time, Emergency Services, EVC/Headteacher contacted if required.

Witnesses (names, addresses, phone contacts)

First-Aid given

--

Actions to find safe environment for rest of party
--

General notes
---------------

On the reverse of this document, please draw diagrams of scene e.g. road position (it may be appropriate to take photos).

LOG SHEET FOR TELEPHONE CALLS				
No.	Time	Name	Information	Action Required
		From /To		
		From /To		
		From /To		
		From /To		

# Trips – Health and Safety

## **CONFIDENTIAL: EMERGENCY TELEPHONE NUMBERS DIRECTORY**

CONTACT		PHONE NUMBER	
		IN SCHOOL HOURS	OUT OF SCHOOL HOURS
School Name:		SEE BELOW	
Headteacher			
Deputy Headteachers / Assistant Headteachers			
Office Manager			
Site Manager / P.O			
Trust CEO			
DSAT Central Team			
Foreign and Commonwealth Office		UK ONLY: 020 7008 1500	ABROAD: +44 20 7008 1500



## Appendix 6: Guidance on Ratios

Ratios are very difficult to prescribe and in reality, will be determined by the risk assessment.

When considering staffing of an activity or visit, it is essential to recognise that the following guidance represents the minimum level of staffing only. Adequate consideration must be given for the maintenance and welfare of the whole party in the event of one or more adults having to leave the group for any length of time.

### DAY VISITS

The following ratios should be considered the minimum for off-site day visits: For example visits to local historical sites and museums or for local walks in normal circumstances.

- Years 1 to 3 a ratio of 1:8 (1 adult to 8 children)
- Years 4 to 6 a ratio of 1:10 - 15 (1 adult to 10 - 15 children)

### RESIDENTIAL VISITS

- For all residential visits, at home or abroad, a good rule of thumb is 1 adult to 10 young persons.
- All residential visits must be accompanied by at least two adults.
- There must be a member of staff of each sex for mixed groups. In the case of a single sex group there must be at least 1 member of staff of the appropriate sex

Where children are of infant school age (less than 7 years old) it is desirable to have mixed gender supervision. However, if this is not possible then reasonable care should be exercised at all times, e.g. boys being taken into the female toilet by female staff. If this is the case and the school cannot arrange mixed gender supervision for mixed gender parties of under sevens, parents should be informed of this and their views taken into consideration. Parents should agree to single sex supervision of a party on the permission form.

Headteachers/Director of Education Education must take single sex supervision into consideration as part of risk assessment and must take the safety of all pupils at all times as an overriding factor when deciding whether or not the visit should take place. The safety of the supervising staff and the recent trend towards litigation should also be considered, especially in the case of single sex supervision of a mixed gender party.

- On residential visits at least one of the adults must hold a valid first aid certificate.



## Appendix 7 – Provider Form

### Notes for the Visit Leader

- You should complete Part 1 and then send the form to the provider for completion.
- You should not send this form to a provider that holds a valid Learning Outside the Classroom Quality Badge, unless you require confirmation of the questions in Section A. Details of the badge and its holders can be found at [lotcqualitybadge.org.uk](http://lotcqualitybadge.org.uk).
- If you need advice on the interpretation of information given by the provider on this form, you should contact your establishment's Educational Visits Coordinator (EVC).

### Notes for the Provider

- Thank you for completing this form. It is designed to help the Visit Leader confirm that you meet required standards.
- Please complete Part 2 and return it to the Visit Leader at the establishment named below.
- You can find out about the guidance that establishments and Visit Leaders should follow at [oeapng.info](http://oeapng.info)

### **PART 1: To be completed by the Visit Leader**

Name & address of establishment (school/service)	
Email	
Name of Visit Leader	
Name of provider	
Proposed date(s) of visit	

## PART 2: To be completed by the provider

Please give careful consideration to the following statements and respond with YES, NO or N/A, or give the specific information required. If you hold a valid Learning Outside the Classroom (LOtC) Quality Badge, you need complete only Section A and the Confirmation.

SECTION A		
To be completed for all types of visit		
1. Learning Outside the Classroom Quality Badge		
1.1	Do you hold a valid Learning Outside the Classroom Quality Badge?	
2. Data Protection		
2.1	Do you comply with the Data Protection Act 2018 and GDPR?	
2.2	Do you have a privacy policy that explains how any personal data the establishment shares with you will be shared, used, stored, secured and eventually deleted or returned?	
2.3	Do you undertake to ensure that no images of participants are taken or used for marketing purposes, or published in any way, without the specific written consent of the establishment and of the participants (or their parents if the participants are under 18)?	
3. Waivers / Disclaimers		
3.1	Do you guarantee that the establishment, the participants or their parents will not be required to agree any waiver or disclaimer which seeks to limit your liability for death or personal injury resulting from your negligence?	
4. Epidemic Infection Control		
4.1	Do you have measures in place to implement government guidelines and minimise the risk of infection?	

SECTION B		
To be completed for all types of visit		
5. Insurance		
5.1	Do you hold public liability insurance which will be current during the proposed visit and which covers all directly provided and sub-contracted activity?	
5.2	If Yes, what is its indemnity limit?	£ M
6. Health, Safety and Emergency Policies		
6.1	Do you comply with relevant health and safety regulations, including the Health and Safety at Work etc. Act 1974 and associated Regulations, and have a written health and safety policy and recorded risk assessments which are available for inspection?	
7. Vehicles		
7.1	Are all vehicles to be used roadworthy, and do they meet the requirements of regulations in the country in which they will be used and regulations on passenger seats and seat restraints?	
8. Staffing		

8.1	Do you have a robust recruitment and engagement process to ensure that staff are suitable to work with young people, including enhanced DBS check and barred list check for any staff engaged in regulated activity?	
8.2	Are there regular opportunities for liaison between your staff and establishment staff?	
8.3	Is there sufficient flexibility to make radical changes to the programme if necessary, and will the reasons for any such changes be made known to establishment staff?	

9. Accommodation		
9.1	Does UK accommodation comply with current fire regulation requirements (Regulatory Reform, (Fire Safety) Order 2005)?	
9.2	Have you inspected all overseas accommodation to be used to confirm that it meets legal requirements of the country concerned and that it has fire safety and security arrangements equivalent to those required in the UK, and are records of these inspections available?	
9.3	Are there security arrangements in place to prevent unauthorised persons entering the accommodation?	
9.4	Are separate male and female sleeping accommodation and washing facilities provided?	
9.5	Is staff accommodation sufficiently close to young people's accommodation for adequate supervision?	
10. Sub-contracting		
10.1	Will you sub-contract any services (e.g. activity instruction, transport, accommodation)?	
10.2	Where any element of provision is subcontracted, do you ensure that each sub-contractor meets the relevant specifications outlined in the other sections of this form, and are records of checks of sub-contractors available for inspection?	
10.3	Do you have procedures for accidents & emergencies, and for reporting incidents and accidents?	

SECTION C		
To be completed if the visit includes activities or field studies		
11. Adventure Activities Licensing Authority (AALA) Licence to be completed if any activities are within the scope of the licensing regulations		
11.1	AALA Reference number	
	Date of expiry	
11.2	Does the Licence held cover all planned activities, which are in the scope of AALA licensing?	
12. Activity Management to be completed about all activities		
12.1	Do you have a policy for staff recruitment, training and assessment, which ensures that all staff with a responsibility for participants are competent to undertake their duties?	
12.2	Do you maintain a written code of practice for activities, which is consistent with any relevant National Governing Body (NGB) (or equivalent organisation) guidelines and, if overseas, the relevant regulations of the country concerned?	
12.3	Do you confirm staff competence by appropriate AALA-recognised qualifications for any adventure activities to be undertaken, or have staff had	

	their competence confirmed by an appropriately qualified and experienced technical adviser?	
12.4	Where there is no NGB or equivalent organisation for an activity, are operating procedures, staff training & assessment requirements explained in a code of practice?	
12.5	Will participants at all times have access to a person with a current first aid qualification, and are staff practised & competent in accident & emergency procedures?	
12.6	Do you make clear your expectations of how responsibilities for the supervision and welfare of participants are shared between your staff and visiting staff?	
12.7	Is all equipment used in activities suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks as necessary?	

SECTION D	
To be completed by Tour Operators	
13. Tour Operators	
13.1	Do you comply with the Package Holidays and Package Tours Regulations 1992, the Foreign Package Holidays (Tour Operators and Travel Agents) Order 2001 and the Package Travel and Linked Travel Arrangements Regulations 2018 including bonding to safeguard customers' monies?
13.2	Details of bonding (ATOL, ABTA, etc.)

SECTION E	
To be completed if the visit includes an overseas expedition as defined in National Guidance document 7q "Overseas Expeditions" at <a href="https://oeapng.info">https://oeapng.info</a>	
14. Overseas Expeditions	
14.1	Do you comply with British Standard BS8848:2014?

SECTION F – ACCREDITATION	
15. Details of any accreditations held by the Provider	

PROVIDER CONFIRMATION			
I confirm that the details given above are correct, and that our organisation will give prior notification of any significant changes that might affect the safety and wellbeing of user groups.			
Signed		Date	
Name		Position	
Name of Provider			
Address of Provider			
Telephone		Website	
Email			

## Appendix 8 – Adventure Activities: additional guidance

### Introduction

This Appendix (Appendix 8) includes specific information relating to the adventure activities. 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).

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 school.**

Suggested Staff/student ratios are included - but ratios should always be reviewed as part of the risk assessment.

Where national or local coaching awards exist, they provide a useful benchmark for levels of technical competence, but managers/Headteachers **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, Headteacher must ensure that any employees or volunteers running activities produce evidence of their qualification (original certificates and logbooks must be produced).**

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. Headteachers must ensure that proposed activities do not breach licensing regulations. Advice is available from the Health, Safety and Wellbeing Team.

### Specific Activities (listed alphabetically):

#### 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 provide useful training and experience of camping:

- The Basic Expedition Leaders award (BEL)
- The Walking Group Leaders Award (WGL)
- The Summer Mountain Training England Scheme (ML)
- Level 2 Basic Food Hygiene Award – If staff are preparing food for pupils

**It is particularly important that a 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.

## Canoeing and Kayaking

**National Governing Body:** The British Canoe Union

**Relevant Qualifications:** Coach Level 1-5

These qualifications are available in 3 basic types of craft (Kayaks, Open Canoes and Placid Water Open Cockpit Kayak). They are also split between inland and sea for kayaks. Advice is available from the BCU.

**Canoeing activities must be run by staff/instructors with appropriate B.C.U. qualifications.** They must be operating within the remit of their award: advice is available from the BCU.

## 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' available from HSE - Publications: Free Leaflets - Entertainment and Leisure

[www.hse.gov.uk](http://www.hse.gov.uk).



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.

Where combined water/rock activities are planned, ample advanced notice should be given to the EVC/Headteacher to ensure that these requirements have been met.

## 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 school 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 2014)?
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 please contact the Regional Office;

(T): 01213089470

(F): 01213085561

(E) [centralengland@DofE.org](mailto:centralengland@DofE.org) .

## Mountain Biking (and Off Road Cycling)

**National Governing Body:** There is no one body nationally recognised as the "Governing Body" for mountain biking.

**Relevant Qualifications:** Organisations such as [CTC](#) and [MIAS](#) offer training and assessment, which have wide recognition.

The British Cycling Federation offers advice on touring, etc.

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.

Helmets are required at all times.

Bikes should be maintained in good condition and checked before use.

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.

## Orienteering

**National Governing Body:** British Orienteering Federation (BOF)

**Relevant Qualifications:** BOF Teacher/Leader Level 1/2, BOF Instructor

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).

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.

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

## Open Water Swimming

**No Open Water Swimming can take place without prior school approval.**

Hotel (and other) Swimming Pools without lifeguards

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

## Rock Climbing (including climbing walls and abseiling)

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

**Relevant Qualifications:**

- **Climbing Wall Award (CWA)**  
Remit is artificial climbing walls, with separate endorsements for teaching abseiling and lead climbing.
- **Single Pitch Award (SPA: formerly SPSA)**  
Nationally recognised qualification for instructing rock climbing on climbing walls and suitable single pitch crags.
- **Mountain Instructor Award (MIA)**  
This requires the summer ML Award as a prerequisite. It includes lead climbing and multi-pitch climbing as well as top roping.
- **Mountain Instructor Certificate (MIC)**  
This requires the Summer and Winter ML Awards and involves lead climbing, top roping, and winter snow and ice climbing.

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

## Abseiling

Staff supervising abseiling should be qualified to the standards outlined above (Abseil module required for CWA).

## Sailing

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

**Relevant Qualifications:** Instructor, Senior Instructor, There are separate qualifications for tidal areas. Staff running sailing activities must hold current RYA qualification(s). They must be operating within the remit of their award: advice is available from the RYA.

## Snowsports

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities.

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.

### **Relevant Qualifications:**

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 Snow sport Course Organiser Award (SCO), administered by Snow Sport England [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) and must have previously accompanied at least one educational snow sports visit. It is good practice for staffing to include one or more Alpine Ski leader.

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 staff intending to lead skiing or snowboarding (i.e. not using a ski school instructor) must be qualified as below and have been approved.

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

- The Alpine Ski Course Leader Award (ASCL) [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) or
- The Alpine Ski Leader Award (ASL) [www.snowsportscotland.org](http://www.snowsportscotland.org) or
- BASI Level 2 Alpine Instructor or higher [www.basi.org.uk](http://www.basi.org.uk)

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

- The Snowboard Leader Award (SBL) administered [www.snowsportscotland.org](http://www.snowsportscotland.org) or
- BASI Level 2 Snowboard Instructor or higher [www.basi.org.uk](http://www.basi.org.uk)
- NOTE: A skiing qualification is not appropriate for instructing or supervising snowboarding and vice versa.
- Young people must not participate in off-piste activities except when under the instruction of a ski school.

### **Helmets**

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

- All participants and staff should consider wearing approved snow sport helmets.
- 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. All ski companies should be requested to fill in and sign the Provider Form – 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 (minimum qualification Club instructor). Instructors can normally be booked in advance at most slopes. The maximum group size should be 10.

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. The maximum number of students in such a group should be 5.

Students should not be allowed to ski alone.

## **Walking in Open Country/Remote Terrain (including Hill Walking, Fell Walking, Rambling, etc.)**

For the purposes of school approval, 'open-country remote terrain' is normally defined as terrain, which is moorland or more than 300m above sea-level, and from which it would take more than 30 minutes travelling time to reach any accessible road or refuge. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate.

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

The responsibility for the safety of participants in an adventurous activity will rest with either: an external provider or a member of your establishment's staff - see requirements below. This person must be specifically approved by the school to lead the activity.

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

**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:**

- **SLUK Basic Expedition Leader (BEL, previously BELA: formerly BETA!)**

A basic qualification for Leaders wishing to take groups walking or camping in rural areas, in summer conditions (NB. does not include hill walking). The BEL award is a suitable training programme for staff wishing to lead groups in the low level areas, using well marked footpaths without technical difficulties.

- **Walking Group Leaders Award (WGL)**

Nationally recognised fell walking award for leaders of walking groups in summer conditions, in non-mountainous hilly terrain (Known variously as upland, moor, bog, hill, fell or down), with well-defined obvious boundaries, such as roads and coastlines, where any hazards within it are identifiable and avoidable and where wild camping or movement on steep ground is not involved.

- **Mountain Leader Award (ML)**

This award is intended for those who take groups walking and camping in hills and mountains during the summer months, where the use of ropes is not envisaged. Includes movement on steep ground, and leadership on this terrain.

- **Winter Mountain Leader Assessment**

This is a separate course, which assesses leaders in the more arduous conditions which can be found in winter, including movement on snow and ice.

- **Mountain Instructor Assessment (MIA), Mountain Instructor Certificate (MIC)**

These awards both have the summer ML as a prerequisite, but they require additional rock climbing and mountaineering skills. The latter award also requires the winter "ML" and includes winter climbing on snow and ice.

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

## Appendix 9: Categories Of Activity And Levels Of Approval

CATEGORY	LEVEL OF APPROVAL	ACTIVITY	ENVIRONMENT / LOCATION
A	Headteacher	<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. Bradgate Park, Swithland Woods, Leicester 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	Headteacher	<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 'non-remote' country</li> <li>• Non-remote Country – enclosed farmland, fields, low land forest – not moorland, mountain (above 300m) 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	LTS must check and advise before Headteacher & Director of Education sign off	<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 300m)</li> <li>• Near cliffs or steep terrain</li> </ul>



			<ul style="list-style-type: none"><li>• Areas subject to extremes of weather or environmental change</li><li>• Swimming in non-lifeguarded pools or open water</li></ul>
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