

Warwickshire County Council Educational Visits Policy

Guidance for Off-Site Visits and Related Activities with National Guidance & EVOLVE

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*Working for
Warwickshire*

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1 General

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

Warwickshire County Council - Educational Visits Support (the LA) acknowledges the immense value of off-site visits and related activities to young people, and fully supports and encourages those that are well planned and managed.

The LA adopts the Outdoor Education Advisers' Panel 'National Guidance' (NG): www.oeapng.info NG references in this document hyperlink to specific sections of NG.

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

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

This guidance document, plus all forms and other resources can be downloaded from EVOLVE:

EVOLVE

2 Responsibilities

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

For community schools, community special schools, voluntary controlled schools, maintained nursery schools, pupil referral units, and statutory youth groups, the employer is the local authority. These establishments must adhere to this requirements document. Where any of the above schools has chosen not to access this area of support from the local authority, then they must ensure that their systems and procedures are equally as robust as would be the case if they were accessing this support. This would include ensuring that National Guidance www.oeapng.info is followed, that your Educational Visits Coordinator has attended an EVC course, and that you have access to competent technical advice, for example, via an Educational Visits Adviser.

The LA monitors these visits on a sample basis via EVOLVE. The LA does not have the capacity to undertake 'field observation' of visits, and this task is therefore delegated to the head of establishment and/or EVC.

For academies, foundation, independent, and voluntary aided schools, the employer is usually the governing body or proprietor. Although welcome to do so, these establishments are not obliged to use the guidance of the LA. If using LA guidance, this should be clearly stated. If not using LA guidance, establishments are advised to ensure that the systems in place are equally as robust as those of the LA.

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

Refer to National Guidance documents 5.2b [Planning Basics](#) and [Checklists](#)

3 Role of the Educational Visits Coordinator

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

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

The EVC should attend initial EVC training as soon as possible after appointment. Subsequent update training every 3 years is a requirement or a repeat full course is recommended for those who are involved in the role infrequently.

The EVC should support the head of establishment in ensuring that competent staff are assigned to lead and accompany visits, see [Section 11](#), and with approval and other decisions.

The EVC must ensure that a policy is in place for educational and off-site visits, and that this is updated as necessary. This should be readily available to staff via their establishment's own EVOLVE Resources section. (Establishments may wish to consider adapting the sample 'Educational Visits Checklist' in EVOLVE Resources to suit their own particular circumstances).

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

4 Recording Visits & the 'Local Learning Area'

It is recommended that all visits are recorded, approved and evaluated via EVOLVE, as this reduces bureaucracy, ensures that a robust audit trail exists, and evidences learning outcomes.

Local Learning Area (if designated)

This refers to specified visits/activities within a designated geographical area that are part of the normal curriculum and take place during the normal school day. If the school has designated a Local Learning Area, for example by adapting the template document in EVOLVE/ Resources/Forms, then these activities should follow the Standard Operating Procedures set out and should not normally need additional risk assessments or notes added. These activities can be recorded via the EVOLVE Local Visits module (if used), or via a 'Signing Out' sheet containing relevant information and left with the school office before departure.

See 'Local Learning Area Policy template' in EVOLVE Resources.

See 'Example signing-out sheet' in EVOLVE Resources

5 Approval of Visits

Final approval is delegated to the Headteacher for all visits, with the exception of Overseas visits or Residential visits and Adventurous activity visits where the provider does not hold an LOfC quality Badge. For LA Maintained schools, these visits may then require Local Authority approval. These visits should be submitted to the LA at least 10 days in advance. In approving visits, the Head and EVC should ensure that the visit leader has been appropriately inducted/trained, and is competent to lead the visit, see [Section 11](#)

What does 'Visit Approved by LA' mean?

When the Headteacher authorises a visit on EVOLVE, he/she confirms that the visit complies with school and local authority policy, and that in their opinion the visit leader and any accompanying staff are competent to supervise the visit.

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

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

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

The local authority operates on the basis that the Headteacher should not submit the visit for LA approval if he/she is not satisfied with the intended arrangements. 'Approved by LA' therefore confirms that the school appears to have followed the local authority's stated procedures.

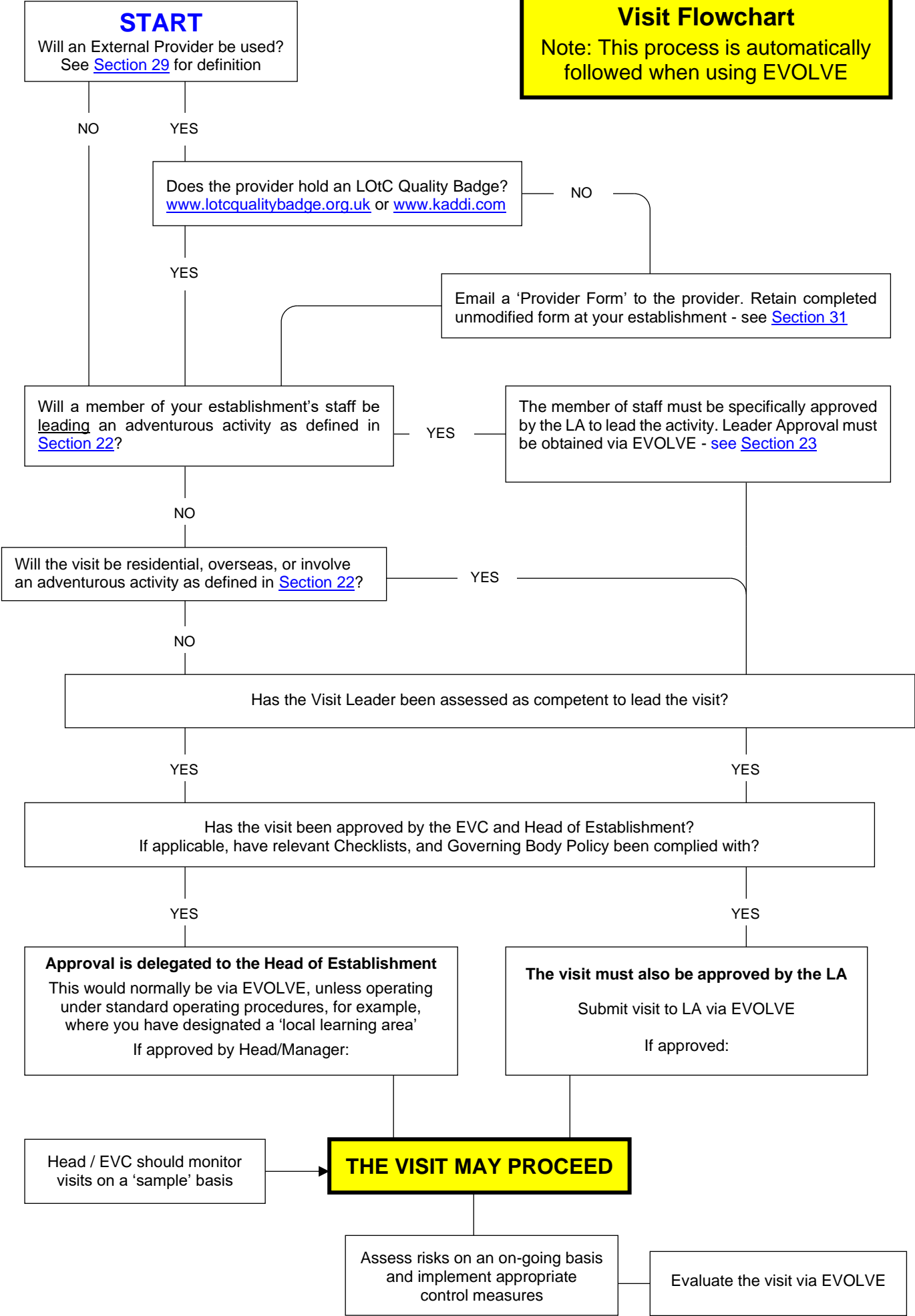
Although all visits requiring local authority approval are viewed, it is not feasible for the LA to scrutinise in detail all information and attachments, and so this is undertaken on a 'sample' basis.

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

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

Where school staff lead 'Adventurous Activity – Notification to LA should be sought to evidence qualified staff. See [Section 21](#)

Visit Flowchart
 Note: This process is automatically followed when using EVOLVE



START
 Will an External Provider be used?
 See [Section 29](#) for definition

NO YES

Does the provider hold an LOTC Quality Badge?
www.lotcqualitybadge.org.uk or www.kaddi.com

NO

YES

Email a 'Provider Form' to the provider. Retain completed unmodified form at your establishment - see [Section 31](#)

Will a member of your establishment's staff be leading an adventurous activity as defined in [Section 22](#)?

YES

The member of staff must be specifically approved by the LA to lead the activity. Leader Approval must be obtained via EVOLVE - see [Section 23](#)

NO

Will the visit be residential, overseas, or involve an adventurous activity as defined in [Section 22](#)?

YES

NO

Has the Visit Leader been assessed as competent to lead the visit?

YES

YES

Has the visit been approved by the EVC and Head of Establishment?
 If applicable, have relevant Checklists, and Governing Body Policy been complied with?

YES

YES

Approval is delegated to the Head of Establishment
 This would normally be via EVOLVE, unless operating under standard operating procedures, for example, where you have designated a 'local learning area'
 If approved by Head/Manager:

The visit must also be approved by the LA
 Submit visit to LA via EVOLVE
 If approved:

Head / EVC should monitor visits on a 'sample' basis

THE VISIT MAY PROCEED

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

Evaluate the visit via EVOLVE

6 Outcomes

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

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

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

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

Refer to NG: [Learning Outside and Off-site visits: self evaluation using the Ofsted framework](#)

[High Quality Outdoor Learning](#) and [A Guide to High Quality Outdoor Learning and Residential Experiences](#) can be used as tools by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. It can also help the leader in providing clarity to a provider when designing a programme.

To assist in the monitoring and evaluation of visits the following outcomes could be considered:

1. Enjoyment
2. Confidence
3. Social Awareness
4. Environmental Awareness
5. Personal Qualities
6. Key Skills
7. Health and Fitness
8. Increased Motivation
9. Broadened Horizons

7 Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. You are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage.

However, the Equality Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

Refer to NG: 3.2e [Inclusion](#)

8 Planning – risk management – What to Record and How?

Note: Risk management during visits is covered in Section 9 – Safety During the Visit

How much planning?

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

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

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

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

Two levels of documentation: Generic / Event Specific

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

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

Activities within the 'Local Learning Area' (if designated)

This refers to specified visits/activities within a designated geographical area that are part of the normal curriculum and take place during the normal school day. If the school has designated a Local Learning Area, then these activities should simply follow the Standard Operating Procedures stated, and do not normally need additional documentation. An example 'Local Learning Area' template for adaptation can be found in EVOLVE/Resources/Forms.

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

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

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

Activities outside the Local Learning Area

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

- Day visits that are more complex or further afield
- Overseas visits
- Residential visits
- Adventurous activities

Planning Meeting

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

What to record and how?

EVOLVE provides a means of recording planning during the planning phase, and enables the EVC and Headteacher/Manager to contribute to, support, and monitor the activity.

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

- Event Specific Plan on EVOLVE
- A mind-map or annotated illustrations (photographed and uploaded to EVOLVE)
- Handwritten notes (photographed or scanned and uploaded to EVOLVE)
- Audio or video files, eg. of a staff meeting (uploaded to EVOLVE)
- A traditional completed template/form (uploaded to EVOLVE)

Information recorded could include:

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

Additional notes on risk management

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

• It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions, will become more 'risk aware' and hence at less risk. They will also have greater ownership of the event. This is endorsed by HSE in [Principles of Sensible Risk Management](#)

• Alternative arrangements (Plan B) should be included within the planning process where appropriate, for example, where weather conditions or water levels might be critical, or where an overcrowded venue might necessitate an alternative option.

• Where an adventurous activity is to be delivered by an external provider, the provider will have responsibility for managing the activity (see Section 31). As such, the provider's risk assessments are not the concern of

the school leader, do not need to be requested from the provider, and do not need to be uploaded to EVOLVE. See National Guidance document [6a FAQ Asking for a provider's risk assessments](#)

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

See National Guidance documents:

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

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

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

9 Safety During the Visit / Ongoing Risk Management

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

The on-going monitoring of all aspects of the visit by the leader and other staff is the single most important aspect in the risk management of visits, and hence safety. This also contributes towards enjoyment and learning.

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

It is primarily to modify or curtail the visit or activity (eg Plan B) to suit changed or changing circumstances - for

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

Refer to National Guidance document 3.4k [Responsibilities of the Visit Leader](#)

An example [Alcohol & Drugs](#) policy is in EVOLVE Resources; establishments may wish to adapt and/or adopt this if appropriate.

10 Parent / Carer Consent

Schools:

Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, it is good practice to inform parents of 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. Parents must be informed of these activities in advance, and given the opportunity to withdraw their child from any particular visit or activity covered by the form. The school must have a robust means of ensuring that changes to parent / carer contact details and child medical details are up-to-date.

E-consent, via services such as EVOLVE+, ParentPay, etc, is an acceptable alternative to paper-based consent forms.

Other establishments:

Annual consent is appropriate for regular routine activities.

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

All: Refer to NG: [Parental Consent](#)

11 Competence to Lead

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

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

Refer to NG: 3.2d [Approval of leaders](#)

12 Staffing and Supervision

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

The [Statutory Framework for the Early Years Foundation Stage](#) no longer differentiates between outings and on-site settings as regards minimum specified ratios.

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

- The type, level, and duration of activity.
- The nature / requirements of individuals within the group, including those with additional needs.
- The experience and competence of staff and other adults.
- The venue, time of year and prevailing/predicted conditions, if applicable.
- The contingency, or 'Plan B' options.

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

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

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

Refer to NG: 4.2a [Group management and supervision](#)

Vetting and Disclosure and Barring (DBS) Checks

Staff and volunteers who work *frequently* or *intensively* with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check with barred list check as part of their recruitment process. For the purpose of this guidance:

- '*frequently*' is defined as 'once a week or more'.
- '*intensively*' is defined as 'four or more days in a month, or overnight'.

Refer to NG: 3.2g [Vetting and DBS Checks](#)

Direct, Indirect and Remote Supervision

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

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

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

Remote supervision is where young people are unaccompanied by a member of staff, and the supervising member of staff is not necessarily in the immediate vicinity, for example as might occur during D of E expeditions, or a 6th Form unaccompanied visit to university open day.

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

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

- prior knowledge of the individuals (including their maturity and levels of responsibility);
- venue and conditions;
- the activity taking place;
- preparatory training;
- the competence of the supervising staff;
- the emergency systems in place.

When recording a **remotely** supervised visit on EVOLVE, there must still be a named visit leader. This will be the member of staff that has made a professional judgement regarding the level of responsibility and maturity of the participants, and decided that in their opinion it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. A 'Note' should be added to EVOLVE specifying that remote supervision applies.

Refer to NG: 4.3b [Ratios and Effective Supervision](#)
4.2a [Group Management and Supervision](#)
3.2g [Vetting and DBS Checks](#)

13 First Aid

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

General 'life experience', or a 3 hour non-assessed 'Basic Skills' course is suitable for routine urban visits. However the nature of the visit may indicate that a higher level qualification is appropriate, especially in circumstances where it is likely that access by the emergency services may be delayed.

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

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

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

Refer to NG: 4.4b [First Aid](#)

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

14 Insurance

Insurance for off-site visits

Where the school subscribes to the WES Schools Insurance Service the following insurances apply to off-site visits to the same extent as they do on school premises:

- Employers' liability. Indemnifies the school in respect of claims for compensation for bodily injury suffered by any employee. For the purposes of this insurance, persons acting in a voluntary capacity as assistant supervisors are classed as employees
- Public liability. Indemnifies the school and employees in respect of claims for compensation for bodily injury and third party property damage
- Personal accident. Limited cover for teachers and volunteers

Cover is not provided for the following risks, whether off-site or on-site, and will require separate insurance cover, as required:

- Personal accident for pupils: provides specific benefits in the event of an accident and should not be confused with public liability insurance, which indemnifies the school should it be legally liable for damages
- Loss of, or damage to, personal effects
- Cancellation or curtailment: should be considered where significant non-refundable deposits or costs are incurred if the trip is cancelled or a pupil cannot travel.
- Medical expenses and repatriation costs: should be considered essential for non-UK trips
- Personal liability.

Visit and activity leaders should contact the Council's Insurance Team (tel: 01926 418160 email: rogerlinney@warwickshire.gov.uk) if they need clarification on any of the above or advice on any circumstances requiring early notification of specialist activities to the council's insurer.

Where insurance is not provided via the Council, those establishments should ensure they have appropriate insurance in place, similar to that outlined above.

For those establishments who make their own insurance arrangements, personal accident / travel insurance must be taken out for all visits abroad. For all other visits it is the responsibility of the Governing Body (where applicable), Head of Establishment, and Educational Visits Coordinator to determine whether additional insurance should be taken out. The establishment should particularly consider the need for additional insurance for residential activities, or those involving adventurous activities or hazardous environments.

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

- **Use of privately owned or hired vehicles**

Teachers, employees and voluntary helpers who use their own vehicles on behalf of the County Council, must ensure that their Motor Vehicle Insurance Policies specifically permit such use. Should an employee or volunteer fail to make such an arrangement and an accident occurs resulting in a claim, their insurers may declare the policy void. In addition, the teacher or volunteer may be prosecuted for failing to affect adequate cover. Similar care must be taken when hiring vehicles to ensure that adequate insurance is arranged.

Section 2 Alternative Travel Insurance arrangements

2.2.1 Travel Insurance Offered by Tour Operators and External Providers

In certain circumstances, a visit organiser may wish to insure participants other than through a Suffolk County Council policy. Commonly, this will be where a tour operator or external provider offers a package including travel insurance. The visit organiser or EVC must send details, with as much notice as possible, of the alternative insurance policy to the Insurance Team and gain approval before commencing the visit.

2.2.2 Insurance Offered through the Duke of Edinburgh's Award Scheme

The Duke of Edinburgh's Award Scheme automatically insures all participants and adult helpers, whilst participating in Award activities. However, the scale of benefits is low and the policy is not intended by the Award Scheme to offer primary cover. This policy is not an acceptable alternative to the County travel insurance policy.

3 Further Information

For further advice and information on insurance matters please contact :

Council's Insurance Team (tel: 01926 418160 email: rogerlinney@warwickshire.gov.uk)

Refer to NG: 4.4c [Insurance](#)

15 Transport

Refer to NG: 4.5a [Transport general considerations](#)

When planning offsite visits, establishments should give particular consideration to the transport activity. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it; therefore establishments **must** follow any relevant WCC policies and guidance. All national and local regulatory requirements **must** be followed.

A number of factors should be considered as part of your driving/ transport risk assessment including, but not limited to: driver competence, suitability/maintenance of vehicles, insurance, seat belts, weather conditions and driver fatigue.

The level of supervision necessary should be also considered - remember, the driver of a vehicle transporting children and/or young people cannot drive and supervise at the same time. Therefore a key judgement needs to be made about the likely behaviour and individual needs of the passengers. If any of the children and/or young people require close supervision, then another adult should travel in the vehicle, to ensure the driver is not distracted.

Note: in the interests of safeguarding, it is strongly recommended that a minimum of two adults travel in each vehicle.

PRIVATE CARS

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

Refer to NG: 4.5c [Transport in private cars](#) and 6.f [FAQ Use of private cars](#)

COACHES

The visit leader should ensure that coaches and buses are hired from a reputable company.

The LA may have a list of approved providers. If this is no longer available you should refer to the National guidance document 4.5e [Hiring a coach](#) Whilst UK legislation ensures that coach companies are fit for public use, the facilities available on coaches may vary. Liaising with other establishments within the LA that have used a particular company (via a search on EVOLVE) will help to determine the level of service that may be provided.

MINIBUSES

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

Refer to NG: 4.5e [Transport in minibuses](#)

PUBLIC TRANSPORT IN LONDON

For public transport within the Greater London area contact 'Transport for London', who offer free travel for establishment parties on London buses, Underground, Tramlink, and Docklands Light Railway, to cultural destinations.

See [Transport for London – School Parties](#) Tel. 0343 222 1000 Email. schoolparty@tfl.gov.uk

16 Farm Visits

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

Refer to NG: 7g [Farm Visits](#)

Refer to: EVOLVE National Library: '[Preventing or controlling ill health from animal contact at visitor attractions - Advice to Teachers](#)' and associated documents.

Refer to: Farming & Countryside Education: www.face-online.org.uk

17 Water-Margin Activities

This section applies to:

Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow water*. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment, or water-going craft.

* 'gentle' means hardly moving at all.

'shallow' typically means up to the knees of the participants.

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

At the outset the leader must decide whether the activity:

- a) Falls **within** the definition in bold above - in which case the below guidance applies,
or
- b) **Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and [Section 24](#) applies.

All staff involved in water-margin activities should be conversant with the guidance contained within National guidance document 7i [Group Safety at Water Margins](#). This document must be made available to all supervising adults in advance of the visit.

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.

LA approval is not required for water-margin activities, but the leader must have previous relevant experience, and must have been assessed as competent to lead the activity by the EVC and/or Head of Establishment.

Refer to NG: [Natural Water Bathing](#)

18 Residential Visits

The LA 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.

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

[A Guide to High Quality Outdoor Learning and Residential Experiences](#) can be used as tools by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. It can also help the leader in providing clarity to a provider when designing a programme.

Refer to NG: 4.2b [Residential Visits](#)

19 Overseas Visits

The LA 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.

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

For all visits it is essential that consideration is given to the following:

- a) Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- b) Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- c) Transport systems have been assessed as safe for use.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: www.fco.gov.uk (from the home page select 'Travel Advice'). All relevant FCO information should be circulated amongst the staff team.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card) or the new [GHIC card](#) (UK Global Health Insurance Card (GHIC)). For more details See <https://www.gov.uk/visit-europe-1-january-2021>

For Exchange Visits: Refer to NG: 7f [Exchanges and home stays](#)

For Overseas Expeditions See [Section 27](#)

20 Weather, Clothing & Survival

Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate to:

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

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

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

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

21 Swimming

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

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

All swimming activities and venues must be included within the visit plan, and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example, a hotel pool may be available.

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

Swimming pools (lifeguarded)

LA Approval is not required

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

Refer to NG: 7.x [Swimming pools](#)

Hotel (and other) swimming pools

Establishments should check the lifeguarding position in advance.

LA Approval is not required for this activity.

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

The following awards/qualifications apply:

For free swimming activity

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

For structured or programmed activity

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

The role of the lifeguard is:

- To directly supervise the pool and the pool users, exercising appropriate levels of control. (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)
- If necessary, brief pool users in advance regarding rules (eg. no diving, running, etc.).
- To communicate effectively with pool users.
- To anticipate problems and prevent accidents.
- To intervene to prevent behaviour which is unsafe.
- To carry out a rescue from the water.
- To give immediate first aid to any casualty.

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

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

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

Refer to NG: 7.x [Swimming pools](#)

Open water swimming (ie not in a swimming pool and not a 'water-margin' activity)

LA Approval is required via EVOLVE.

Particular consideration should be given to the following factors:

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

The designated lifeguard must be dedicated exclusively to the group, and the location used must fall within the RNLI/RLSS definition of a 'safer bathing area'. Local advice must always be sought.

For free swimming activity

- A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see www.lifesavers.org.uk Note: this is for beach/sea only, not inland water. **or**

For structured or programmed activity

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

Refer to NG: 7o [Natural Water Bathing](#)

22 Definition of an 'adventurous activity'

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

- 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 indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration
- Shooting / archery / paintballing
- 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
- 'Extreme' sports
- Other activities (eg. initiative exercises) involving skills inherent in any of the above

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

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

- Walking in parks or on non-remote country paths
- Physical Education activities and sports fixtures (other than the above)
- Field studies - unless in the environments stated in 'open country'
- Swimming in lifeguarded pools
- Theme parks, Tourist attractions
- Pedal go-karts
- Ice skating (rink)
- Farm visits
- Local traffic survey
- Museum, library, etc.
- Water-margin activities as defined in [Section 17](#)

Please contact the local authority if there is uncertainty over whether a particular activity requires LA approval.

23 Adventurous Activities

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

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

[Open country activities](#) - Section 25

[Snowsports](#) - Section 26

[Overseas expeditions](#) - Section 27

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

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

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

a) **An external provider** - see [Section 31](#)

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

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

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

or

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

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

24 Water-Based Activities

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

The LA 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.

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

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

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

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

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

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

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

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

or

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

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

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

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

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

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

25 Open-country activities

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

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

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

- a) **An external provider** - see [Section 29](#)
Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.
or
- b) **a member of your establishment's staff** - see below
This person must be specifically approved by the LA to lead the activity, via EVOLVE.

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

- a) For leaders of walking groups outside the UK or Ireland, please contact the LA for further guidance.
- b) For leaders of walking groups in mountainous terrain within the UK and Ireland
 - Mountain Leader Award (Summer or Winter as appropriate) www.mltuk.org **or**
 - A written statement of competence by an appropriate technical adviser - see [Section 28](#)
- c) For leaders of walking groups in summer conditions in non-mountainous hilly terrain (Known variously as upland, moor, bog, hill, fell or down), with well defined obvious boundaries, such as roads and coastlines, and where any hazards within it are identifiable and avoidable, and where wild camping or movement on steep ground is not involved.
 - Walking Group Leader Award www.mltuk.org **or**
 - A written statement of competence by an appropriate technical adviser - see [Section 28](#)
- d) For leaders of walking groups in terrain 'easier' than that defined in c)

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

 - Countryside Leader Award www.countrysideleaderaward.org
 - Lowland Leader Award www.mltuk.org
 - Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL) www.bst.org.uk
 - Completion of a suitable 'Leader Training' Course.
 - A written statement of competence by an appropriate technical adviser see [Section 28](#)
 - Evidence of recent, relevant experience, appropriately corroborated.
 - An assessment of competence (written or implied) by the Head of Establishment.

26 Snowsports

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

Snowsports (eg skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires LA approval.

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

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

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

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

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

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

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

- The Snowboard Leader Award (SBL) administered www.snowsportscotland.org **or**
- A statement of competence by an appropriate 'technical adviser' - see [Section 28](#)

See EVOLVE Resources for the current good practice guidance on helmets for snowsport activities.

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

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

Important: Owing to unacceptable liability waiver requirements, currently LA establishments must not use the following resorts: Vail, Beaver Creek, Breckenridge, Keystone and Heavenly Lake Tahoe, until further notice. For other resorts in USA or Canada, the establishment must check the liability position prior to making a commitment.

Refer to NG: [Snowsport visits](#)

27 Overseas Expeditions

The LA acknowledges the immense educational benefits that overseas expeditions can potentially bring to young people, and fully supports and encourages overseas expeditions that are correctly planned, managed, and conducted.

Overseas Expeditions (for the purposes of this document) are defined as those which typically involve journeying in remote areas of the world and/or in developing countries.

There are stringent requirements on Overseas Expedition providers, and establishments may therefore need to allow up to 18 months for LA approval to be granted. A 'Note' (for the attention of the LA) should be added to the EVOLVE Visit Form as soon as possible during the planning stages.

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

- a) Holds an LOtC Quality Badge www.lotcqualitybadge.org.uk **or**
- b) Provides a statement of compliance with [*Guidance for Overseas Expeditions, Edition 4*](#)

For providers that do not hold an LOtC Quality Badge, 'Guidance for Overseas Expeditions, Edn.4' should be referred to when the proposal is initiated. This document contains information for both establishments and providers, and includes a checklist of vital aspects that **must** be considered prior to the establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

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

Visit leaders may find it beneficial to attend the one day course entitled 'Overseas Expeditions and Fieldwork: a Course for Teachers and Youth Leaders' organised by the Royal Geographical Society www.rgs.org/eac

Refer to NG: [*Overseas Expeditions*](#)

28 Trampoline Parks

The Association for Physical Education (AfPE)'s view is that trampolining is suitable for teaching in secondary schools only. It is seen as one of the higher risk activities, and as such, those teaching it must have undertaken specific trampolining qualifications. AfPE currently recommends that schools do not arrange visits for pupils to Trampoline Parks.

There is currently no robust inspection/accreditation system in place for the supervision of Trampoline Parks, and until such time as this exists, schools should fully consider the National Guidance document 6n [*Visiting trampoline parks*](#)

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

Please note that the above does not apply to trampoline clubs or centres which are registered with British Gymnastics. These activities are not classified as 'adventurous', and schools intending to visit these facilities should comply with current AfPE guidance.

29 Emergency Procedures

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

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

For visits that take place outside normal establishment hours:

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

In an emergency, if it is not possible to reach any of the designated establishment emergency contacts, the leader should call the LA 24 hour emergency number - see [Contacts](#)

Refer to NG: [Emergencies and critical incidents](#)
[Emergencies – the establishment's role](#)
[Emergency procedures for visit leaders](#)

Emergency planning and critical incident support

A critical incident is defined when any member of a group undertaking a LOtC / OEV activity:

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

In November 2019, the Department for Education released a suite of documents to assist schools with planning for emergencies and business continuity issues. Click the link below to access these.

<https://www.gov.uk/government/publications/school-and-college-security>

The CSW Resilience Team have also created some supporting documents to assist in local planning arrangements. These can be accessed via the following link - <https://cswprepared.org.uk/be-prepared/schools-support-2/>

The Emergency Base Contact details will be issued to, and carried at all times, during the LOtC/ OEV activity, by the Visit Leader and supervisors.

If a critical incident does occur, the Visit Leader will contact their Emergency Base Contact. The Emergency Base Contact will then contact the CSW Resilience team for further support and advice, using the 24 hour duty telephone number. [CSW - Warwickshire Guidance & Advice](#)

30 Approval of staff to lead an adventurous activity

PROCEDURE FOR OBTAINING APPROVAL

Staff who wish to lead (ie. supervise or instruct) an adventurous activity, as defined in [Section 21](#), must first upload details and scanned copies of all relevant qualifications (eg instructor certificates, first aid, etc) to the 'My Details' section of their EVOLVE account.

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

On receipt of a Visit Form (and embedded ALF), the LA will view the proposed activity in the context of the leader's competencies and qualifications.

Where approval is not granted to lead the activity, the Visit Form will be returned to the EVC via EVOLVE, with an attached note. Where this is the case the activity must not take place.

CRITERIA FOR APPROVAL

Approval will normally be given where the leader of the activity has recent relevant experience, and:

- is appropriately qualified through the relevant National Governing Body, **or**
- has a 'Statement of Competence' from an appropriate 'technical adviser' – see below.

For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Body. For further clarification regarding a technical adviser 'Statement of Competence' please contact the LA.

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

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

Approval will always be subject to a requirement that the leader must act at all times within the remit of his/her qualifications, and in accordance with National Governing Body Guidelines where these exist. Approval may also be subject to other conditions which will be specified by the LA on the Visit Form.

Where there is insufficient information for the LA to make a decision regarding approval, then the applicant may be asked to provide further information (eg evidence of awards, experience, and log book details, etc). In some cases a meeting with the applicant may be requested by the LA.

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

31 Using an External Provider

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

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

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

- Leisure centre providing non-adventurous activities
- Swimming Pool
- Youth Hostel (where accommodation only is used)
- Hotel, B&B, Campsite, etc
- Museums, galleries, etc
- Tourist attractions
- Theme Parks
- Farms
- Coach, Train, Ferry, or Airline company
- Climbing Wall where instruction is provided by a member of your establishment's staff with an approved Activity Leader Form (ALF) ([Section 28](#) applies)
- 'Volunteer' instructor of adventurous activities (see below)

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Head of establishment. The LA does not 'approve' external providers or tour operators. Establishments will find it useful to 'Search by External Provider' on EVOLVE, and liaise with other LA establishments that have used a particular provider.

Establishments should consider the requirements under 'best value' when selecting an external provider.

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

- a) The Provider holds an LOtC Quality Badge www.lotcqualitybadge.org.uk or www.kaddi.com

or

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

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

Note: EVOLVE automatically identifies providers that hold an LOtC Quality Badge, via the linked search tool Kaddi www.kaddi.com

Procedure for Providers that hold an LOfC Quality Badge

www.lotcqualitybadge.org.uk or www.kaddi.com

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

Procedure for Providers that **do not** hold an LOfC Quality Badge

www.lotcqualitybadge.org.uk or www.kaddi.com

- Download a [Provider Form](#)
- Complete the top section.
- Send Provider Form to the provider (email or post).
- On its return check that it has been satisfactorily completed.
- Keep Provider Form on file together with all other relevant documentation.
- It is recommended that you attach the Provider Form to the EVOLVE Visit Form.

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

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

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

In some instances, for example where an establishment intends to use an 'external', **voluntary** individual for services, then this person may be regarded as a temporary member of staff and the procedure outlined in [Section 28](#) may be appropriate.

The above procedure is **not** sufficient for Overseas Expeditions (ie. 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 [Section 26](#)

For completion by 'external providers' used by
WCC for Schools establishments

Providers that do not hold an LOfC Quality Badge and that are to be used by establishments from Warwickshire County Council, are required to complete and return this form in advance of the establishment making a commitment.

Establishment..... Staff member in charge
 Date(s) of visit Name of provider

The provider or tour operator providing services to the establishment named above is asked to give careful consideration to the statements below and sign in the space at the end of the form to indicate that the standard of service will meet the conditions listed. Please tick all specifications you can meet, indicate by a cross any you cannot meet, and write N/A against any specifications which do not apply to your provision.

Section A should be completed for all visits. Sections B (adventure activities), C (tour operators) and D (expeditions) should also be completed if applicable.

SECTION A - ALL VISITS

Health, Safety, and Emergency Policy

- 1. The provider complies with relevant health and safety regulations, including the Health and Safety at Work Act 1974 and associated regulations for visits taking place in the UK, and has a health and safety policy and recorded risk assessments which are available for inspection.
- 2. Accident and emergency procedures are maintained and records are available for inspection.

Vehicles

- 3. All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used.

Staffing

- 4. All reasonable steps are taken to check staff who have access to young people for relevant criminal history and suitability to work with young people.
- 5. There are adequate and regular opportunities for liaison between establishment staff and the provider's staff and there is sufficient flexibility to make changes to the programme if necessary and the reasons for such changes will be made known to establishment staff.
- 6. The provider has never been dismissed from any employment or had a contract ended

Insurance

- 7. The provider has public liability insurance for at least £5 million with a clause giving 'indemnity to principal'.

Accommodation (if provided)

- 8. UK accommodation has a current Fire Risk Assessment and is safe from the hazards of fire.
- 9. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned.
- 10. There are appropriate security arrangements to prevent unauthorised persons entering the accommodation.
- 11. Separate male and female accommodation and washing facilities are provided and staff accommodation is close to participants' accommodation.

SECTION B - ADVENTURE ACTIVITIES AND FIELD STUDIES IN OUTDOOR ENVIRONMENTS

- 12. Adventure Activities Licensing Authority (AALA) Licence covering dates of visit YES OUT OF SCOPE
- 13. If YES, AALA Licence number R

For AALA licensable activities in the UK, the specifications in this section are checked as part of the AALA inspection. However, providers licensed with AALA are asked to consider these specifications with respect to any activities or aspects of provision not covered by the licence.

Activity management

- 14. The provider operates a policy for staff recruitment, training and assessment which ensures that all staff with a responsibility for participants are competent to undertake their duties.
- 15. The provider maintains a written code of practice for activities which is consistent with relevant National Governing Body guidelines and/or, if abroad, the relevant regulations of the country concerned.
- 16. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be undertaken, or staff have had their competencies confirmed in writing by an appropriately experienced and qualified technical adviser.
- 17. Where there is no National Governing Body for an activity, the provider has a Code of Conduct for that activity which is in line with current good practice within the UK, and this includes appropriate instructor competencies.
- 18. Participants will at all times have access to a person with an appropriate First Aid qualification. Staff are practiced and competent in accident and emergency procedures.
- 19. There is a clear definition of responsibilities between providers and visiting staff regarding supervision and welfare of participants.
- 20. All equipment used in activities is suited to task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary.

SECTION C - TOUR OPERATORS

Where a tour operator delivers services to establishments using other providers eg. ski establishments, transport operators or accommodation, the tour operator must ensure that each provider meets the relevant specifications outlined in Sections A and B of this form and that these providers operate to standards which meet the relevant regulations which apply to the country of operation.

- 22. Sections A and B of this form, as appropriate, have been completed to show that checks have been made. Records are available for inspection.
- 23. The Tour Operator complies with the package travel regulations, including bonding to safeguard customers' monies.
- 24. ATOL, ABTA or other bonding body name and numbers

SECTION D - OVERSEAS EXPEDITIONS

- 25. The provider complies with 'Guidance for Overseas Expeditions, Edition 4' (GOE4).

If any of the above specifications cannot be met or are not applicable, please give details:
Details of any other accreditation, eg with National Governing Bodies, tourist boards, etc.

DECLARATION

I hereby certify that I am an authorised signatory to enter into this Agreement and to bind the said company, firm, person or corporation to the terms and conditions herein.

Signed Date

Name (print) Position in organisation

Full name and address of company, firm, person or corporation.....

.....

Tel Fax..... E.mail

EVENT SPECIFIC NOTES

What are the really important things we need to do to keep ourselves safe?

Visit details..... Carried out by Date

ISSUE Consider SAGE: S taff – A ctivity – G roup – E nvironment	HOW TO MANAGE IT	WHO TO BE INFORMED		
		PARENTS	STAFF	PARTICIPANTS

Generic procedures do not need to be repeated here, but you must ensure that appropriate persons are aware of these.

Use of a private car to transport young people

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

2	Signed: _____ Print name: _____
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3	Address: _____ _____ _____ _____
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4	Date: _____
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The LA and the establishment reserve the right at any time to request copies of any relevant documentation i.e. Registration Document, MOT, Insurance, Driving Licence

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

Emergency Card Z card (Visit Leader)

This 'card' must remain with the Visit Leader at all times on a visit. The Educational Visits Team can supply additional Z cards : tel. 01245 221022

In the event of a significant incident or accident that does not involve serious injury or fatality, and/or is not likely to attract media attention, the Visit Leader should seek advice from their establishment emergency contact(s). This should normally include a member Senior Management of the establishment.

In the event of an incident that does involve serious injury or fatality, and/or is likely to attract media attention, the Visit Leader should adopt the following protocol:

1. Assess the situation;
2. Safeguard uninjured members of the group (including self);
3. Attend to any casualties;
4. Call emergency services, if appropriate.
(999 or appropriate local number if abroad, Europe 112, North America 911)
5. **Contact the LA Emergency Contact Number** to report the incident and request assistance.

Warwickshire County Council Emergency Contact

Be prepared to give: Your name and Establishment/Group
 Phone number & back up phone numbers
 Exact Location
 Nature of Incident
 Number in the Group

**EMERGENCY CARD
(HOME CONTACTS)**

Emergency Card (Home Contacts)

For visits that take place outside normal establishment hours.

This 'card' or equivalent must remain with the establishment emergency contact(s) at all times, if access to EVOLVE is not possible.

The establishment's Emergency Home Contact(s) should have all visit information, including itinerary, venue details, names, medical information and emergency contact details for all participants including staff.

First Contact Emergency Action Card

If an Establishment adopts this 'card', it should make it available to any staff likely to take incoming phone calls from a Visit Leadership Team.

It is recommended that the card is placed visibly in any office where such calls may be received. It may be laminated, or if used to record information directly, placed in a clear pocket with several back-up paper copies.

On receiving a call

In the event of receiving an emergency call from a group on a Visit, remember they will be very stressed. You need to remain calm to be able to take down some key information without missing anything. Carry out the actions below, as appropriate:

1. Take down the following information:

Who is calling?
If you have more than one Establishment, which one are they from?
What is their role in the group (Visit Leader, Assistant Leader, Helper, Participant)?
What number can they be called back on should you be disconnected?
What has happened? What is the nature of the emergency?
What is the number and status of any casualties?
What is their current location?
What is the total number of people in the party?
Are they staying where they are or moving? If they are moving where to?
What help do they require?
What time did the accident happen?
What time is it now? If the group is outside the UK, what is the time difference?

2. Reassure them and tell them they will be called back once you have contacted a senior manager (within 30 minutes).

3. Contact staff in the following priority order and give them the information you have noted.

The table below should be completed with names and numbers of those who should be informed, in order of priority.

Name	Telephone(s)	Mobile(s)

4. If you receive a call from the media or a Parent, refer them to a senior manager.

Establishment Management Emergency Action Card

This card may be used by the Establishment's Emergency Contact and managers, when called upon to take charge of managing an emergency on an off-site visit.

It is recommended that this card is carried by the Emergency Contact for any visit, and that it is printed, laminated, and a copy placed visibly in the Establishment's office.

On receiving a call

In the event of being alerted to an emergency on an off-site visit use the following to guide your actions:

- STAY CALM – consider the actions you need to take and the people you need to contact to help you. Decide what immediate help you need and contact these people.
- TAKE CHARGE of the incident until relieved by a more senior colleague. It is essential that one person is clearly designated as controller of the emergency response, and that it is clear to all who this is.
- CONTACT the group in difficulty to reassure them, get up to date information and keep them informed of your actions.
- RECORD all information you receive and actions you take.
- DELEGATE TASKS as and when possible/appropriate to allow you to manage the situation and allow for 'concurrent' activity.

Depending on the circumstances and the support required you may need to consider some or all of the following:

- Inform your own senior managers
- Establish an Emergency Support Team, which may need to include the following roles (combine if insufficient staff are available):
 - Overall Controller
 - Coordinator/contact with group (consider keeping the same person to always speak to the group leader)
 - Communications (could be a number of people dealing with different aspects)
 - Logistics – arranging transportation, accommodation etc for group and any travelling team
 - Resources – e.g. office space, reception for any visitors (parents, media etc), refreshments / food – Site Service Officer(s), Admin support
 - Record/log keeper
- Inform your Employer (e.g. the Local Authority), governors, and, if media interest is possible, your Employer's communications team. If necessary, your Employer should implement a Critical Incident Plan to give support to you, the party, and the parents.
- Keep a log of all actions, communications and decisions, including people involved and times.
- Arrange alternate and additional phone lines so that incoming calls do not swamp communications. Consider other means of communication such as internet, email and text.
- Liaise with your employer over provision of links with emergency services, media, tour operators, insurance companies etc. - as necessary.
- Carry out the actions required to support the Visit Leadership Team.
- Decide if a 'Travelling Team' is needed to provide support at the scene.
- Ensure the security of your site and ensure the access gates are staffed to control access (elements of the press may well seek to gain access wherever they can).
- Make arrangements for relatives etc. to be catered for on site or nearby, if possible, while they wait for news.
- Arrange for the return or onwards travel of the party, and/or arrange transport for parents to the scene/hospital
- Control communications and the flow of information to the affected group, parents, other Establishment staff (beware of other staff inadvertently starting rumours circulating).
- Control information to the media – use the expertise of your Employer's communications team and direct all media enquiries to them.
- Make arrangements for meeting the group back from the visit and returning children to parents.
- Consider the possible need for future emotional support and care for anyone involved (don't forget other staff, young people and the Emergency Support Team as well as those directly involved).

Contacts

EVOLVE	www.evolve.online Select: 'EES – Working for Warwickshire Schools'
Warwickshire Juniper Schools Educational Education Adviser	Beverley Jones-Leka Beberley.jones-leka@junipereducation.org Available for EVC or Heads to contact
Warwickshire Associate Educational visits Adviser	Jake Wiid jake@strongrootsgroup.com Avaiable for EVC or Heads to contact
Emergency support WCC	CSW - Warwickshire Guidance & Advice

National Guidance www.oeapng.info

National Library www.national-library.info

LOtC www.lotc.org.uk

LOtC Quality Badge www.lotcqualitybadge.org.uk

**Outdoor Education
Advisers' Panel** www.oeap.info