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North East Lincolnshire Council Educational and Off-Site Visits Inc. Adventurous Activities Policy & Framework

It should be noted that this document has been designed to be used electronically so that all the links and references can be accessed. It is also updated on an on-going basis. Please ensure that the latest version is being used which is available from Educational Visits. (Check the version reference number which can be found at the bottom of each page.)

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Significant Updates

The following updates listed below represent some of the more significant changes with the 'Approval and notification' section in red being of particular significance. If you click on any of the sections listed below it will take you straight to that section.

- **About this guidance**
- **National Guidance**
- **Role of the EVC**
- **Other Roles and Responsibilities**
- **Reducing Bureaucracy**
- Error! Reference source not found.
- **What information is required and how to manage it**
- **Risk Management**
-
- **Learning Outside the Classroom (LOtC) Quality Badge**
-
- **Minibuses**
- **Insurance**
- **Approval of establishment staff to lead Adventurous Activities**
- **Open country activities (when does a simple walk become adventurous?)**
- **Snowsports**
- **Emergency Procedures & Critical Incident Planning**

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Importance of Off-site Visits and Adventurous Activities

North East Lincolnshire Council (NELC) recognises the value of off-site visits and adventurous activities and fully supports and encourages those that are well planned and managed effectively. NELC promotes such positive learning experiences and encourages children and young people to take advantage of the fantastic opportunities provided by our various establishments and services. Supporting Off-site visits and Adventurous Activities across the Borough is a key driver in engaging, inspiring and enthusing young people, enabling learning and development through real life experiences and helping all our young people to realise their potential.

0 About this guidance

0.1 Employer Guidance

This guidance, 'NELC Requirements for Off-site Visits and Adventurous Activities', is the employer guidance for staff employed by NELC and all non-NELC staff whose employer has adopted this guidance.

Staff must follow their employer's guidance. It will be against the employer guidance that staff will be judged in the event of an incident. This guidance (NELC Requirements for Off-site Visits & Adventurous Activities) is based on recognised good practice and underpinned by [National Guidance](#).

0.2 Purpose

This document provides concise and supportive guidance for the planning and management of off-site visits and adventurous activities. It supports a common sense and proportionate approach to health and safety and risk management in line with the Government's drive to reduce wasteful bureaucracy whilst promoting the safety and wellbeing of all participants.

0.3 Status

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

It is a legal requirement that employees follow their employer's guidance. Therefore NELC employees must follow this guidance document.

This guidance recognises and refers to the [OEAP National Guidance for Off-Site Visits](#) as the current National Guidance for Off-site Visits and Outdoor Learning – see Section [National Guidance](#) for further details.

Where another employer (such as the Governing Body of a Voluntary Aided, Foundation, Academy or Free school) wishes to adopt the NELC Requirements for Off-Site Visits and Adventurous Activities, along with the LA's systems and processes for supporting and monitoring Off-Site Visits and Adventurous Activities, they should produce a policy statement that makes this clear.

When a NELC employee commissions a third party to provide any Off-Site Visits or Adventurous Activities, they must ensure that the commissioned agent has either:

- adopted the NELC Requirements for Off-Site Visits and Adventurous Activities **or**
- systems and procedures in place where the standards are not less than those required by NELC as stipulated in this guidance.

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0.4 The Local Authority/Employer

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 guidance document.

For voluntary aided schools, foundation schools, academies and free schools, the employer is usually the governing/managing body. 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 guidance and systems in place meet or exceed the standards set by the LA.

Where the LA is the employer, the Governors should not normally be expected to approve visits, although they should have an overview of the visits that take place and should confirm that appropriate policies and procedures are in place. Where the Governing body is the employer, the governors' responsibilities will be the same as those of the LA. In this case the establishment's educational visits policy must make it clear if the establishment is following LA guidance.

Please also refer to the following OEAP documents:

- [Requirements and Recommendations for Employers](#)
- [Requirements and Recommendations for Establishments](#)
- [Underpinning Legal Framework and Duty of Care](#)
- [Member of a Management Board or Governing Body Responsibilities](#)

0.5 Remit

This guidance applies to all NELC employees (and any employees whose employer has adopted this guidance) whose work involves any of the following:

- Employees who directly supervise, facilitate or oversee young people undertaking experiences beyond the boundary of their normal operational base
- Employees who directly supervise, facilitate or oversee young people undertaking Adventurous Activities.

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

0.6 Statutory Responsibilities of the Local Authority/ Employer

As an employer, NELC is required to ensure that its employees are provided with:

- appropriate guidance relating to Off-Site Visits and Adventurous Activities
- employer-led training courses to support the guidance to ensure that it is understood (eg EVC training, Visit Leader training)
- suitable systems and processes that encourage good practice, help to monitor and ensure that those trained are kept updated
- access to advice, support and further training from an adviser that has proven expertise and experience, as well as a professional understanding of the guidance, the training and expectations set by current good practice.

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0.7 How to use this document

This document has been designed to be used electronically so that all the links and references can be accessed. It is also updated on an on-going basis. Please ensure that the latest version is being used which is available from [Educational Visits](#). (Check the version reference number which can be found at the bottom of each page.)

All the sections highlighted in blue text (except for the section headings) are either internal or external links. If any of the links don't work then it would be very helpful if the [Educational Visits Officer](#) could be contacted by email so that all links can be maintained.

1 National Guidance

This guidance (see [Employer Guidance](#)) recognises and is underpinned by the following National Guidance outlined in Sections 3.1 and 3.2 .

1.1 DfE Advice on Health and Safety for Schools

The [DfE Advice on Health and Safety for Schools \(Jun 2013\)](#) is eleven pages of general health and safety advice for schools, including advice on Educational Visits.

1.2 OEAP NG – National Guidance for Off-site Visits and Outdoor Learning

This is web based guidance that replaces HASPEV (Health & Safety of Pupils on Educational Visits) and is now the recognised National Guidance for Off-site Visits, endorsed by a number of bodies including the NAHT (National Association of Head Teachers) and the NUT (National Union of Teachers).

There is a wealth of information and guidance on the OEAPNG website which is designed to support staff, managers, governors, employers and parents in the provision of high quality Off-site visits and Outdoor Learning.

There are 3 ways of navigating the site and finding what you want:

- i. Select your role from the list on the right hand side (eg Visit Leader, EVC or Head/Manager) which will provide a list of relevant documents for your role.
- ii. Select the 'Content' tab at the top of the page to get a full list of documents organised by categories.
- iii. Use the search option to find documents relating to a specific topic (eg. Ratios)

Follow the link below to explore how to use the site and sample the content available.

[Outdoor Education Advisers Panel - National Guidance for the Management of Outdoor Learning, Off-site visits and Learning Outside the Classroom \(www.oeapng.info\)](#)

It is strongly recommended that all staff involved in leading, managing and overseeing Off-site visits familiarise themselves with the OEAPNG website so that the relevant guidance can be accessed when needed.

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2 Role of the EVC

All establishments must appoint an Educational Visits Coordinator (EVC) who will support the Head of Establishment and help to fulfil the health and safety obligations for Off-Site Visits and Adventurous Activities. In small establishments the EVC may also be the Headteacher or manager.

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 from the senior management of the establishment.

The EVC should attend a full NELC EVC training day, and thereafter attend EVC update training at least once every 3 years. Training records will be held on Evolve.

The EVC should support the head of establishment in ensuring that competent staff are assigned to lead and accompany visits, see section on [Competence to lead](#), as well as providing support for approvals and other decisions.

The EVC should oversee the management of the EVOLVE website for the establishment and ensure that all staff leading or accompanying visits have their own EVOLVE account.

The EVC should ensure that staff leading and accompanying visits receive appropriate training and support.

For full EVC responsibilities and further information refer to the OEAP National Guidance website. See the section [OEAP NG – National Guidance for Off-site Visits and Outdoor Learning](#) for further details regarding the OEAPNG website.

All EVCs must be familiar with the ‘Specific guidance for your role’ (for EVCs) which can be found by accessing the [OEAPNG website](#) and selecting the EVC role on the right hand side of the page. This will bring up all relevant documents for the role of EVC.

In particular EVCs should be familiar with the following OEAP documents:

- EVC Responsibilities
- EVC Checklist
- Requirements and Recommendations for Establishments

2.1 Admin support for the EVC

Admin support for the EVC is sometimes provided in some establishments by non-teaching staff. Where such support is used it is important that it is the specifically competent and experienced EVC (normally a member of the senior leadership/ management team with significant experience of leading visits) that makes the important decisions such as competence to lead, appropriate ratios and effective supervision and submits the visit form to the Head/Manager for approval.

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3 Other Roles and Responsibilities

3.1 All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place. Follow the links below to see the 'Specific Guidance for Your Role' on the OEAPNG (National Guidance) website. See the section of this guidance on [OEAP NG – National Guidance for Off-site Visits and Outdoor Learning](#) for further details regarding the OEAPNG website. All staff taking part in the visit should be involved in the planning and preparation including the risk management process. It is also good practice to involve young people in these processes wherever possible. Staff must be clear about their specific roles and responsibilities on any visit eg are they there to supervise young people while travelling to the venue? At the venue? Or are they to take part in an activity? If there is an element of the activity they are not required to do and if they did so, would in effect not be acting as an employee, this must be made clear to staff.

Visit Leader
All Visit Leaders should be familiar with the 'Specific guidance for your role' (for Visit Leaders) which can be found by accessing the [OEAPNG website](#) and selecting the Visit Leader role on the right hand side of the page. This will bring up all relevant documents for the role of Visit Leader.

The following OEAP documents may be of particular interest and can be found in the 'Specific guidance for your role' section on the OEAPNG website.

- Visit or Activity Leader Responsibilities
- Visit Leader Checklist
- Group Management and Supervision
- Good Practice Basics
- Ratios and Effective Supervision

3.2 Assistant Leader

All Assistant Leaders should be familiar with the 'Specific guidance for your role' (for Assistant Leaders) which can be found by accessing the [OEAPNG website](#) and selecting the Assistant Leader role on the right hand side of the page. This will bring up all relevant documents for the role of Assistant Leader.

The following OEAP documents may be of particular interest and can be found in the 'Specific guidance for your role' section on the OEAPNG website.

- Assistant Leader Responsibilities

3.3 Head/manager

All Heads/Managers should be familiar with the 'Specific guidance for your role' (for Head/Manager) which can be found by accessing the [OEAPNG website](#) and selecting the Head/Manager role on the right hand side of the page. This will bring up all relevant documents for the role of Head/Manager.

The following OEAP documents may be of particular interest and can be found in the 'Specific guidance for your role' section on the OEAPNG website.

- Requirements and Recommendations for Establishments
- Requirements and Recommendations for Employers
- Head teacher responsibilities
- Manager of an establishment other than a school

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- Head or Manager's Checklist

3.4 Governors/ Management

All Governors/Management Boards should be familiar with the 'Specific guidance for your role' (for Governors) which can be found by accessing the [OEAPNG website](#) and selecting the Governors role on the right hand side of the page. This will bring up all relevant documents for the role of Governor/Management Board.

The following OEAP documents may be of particular interest and can be found in the 'Specific guidance for your role' section on the OEAPNG website.

- Requirements and Recommendations for Establishment
- Requirements and Recommendations for Employer
- Member of a Management Board or Governing Body Responsibilities
- Management Board and Governor Check List

3.5 Employers

All Employers should be familiar with the 'Specific guidance for your role' (for Employers) which can be found by accessing the [OEAPNG website](#) and selecting the Employers role on the right hand side of the page. This will bring up all relevant documents for the role of Employer.

The following OEAP documents may be of particular interest and can be found in the 'Specific guidance for your role' section on the OEAPNG website.

- Requirements and Recommendations for Employers
- Requirements and Recommendations for Establishments
- Underpinning Framework and Duty of Care
- Monitoring

3.6 Parents/guardians

Parents may wish to familiarise themselves with the 'Specific guidance for your role' (for Parents) which can be found by accessing the [OEAPNG website](#) and selecting the Parents role on the right hand side of the page. This will bring up all relevant documents for the role of Parent.

The following OEAP documents may be of particular interest and can be found in the 'Specific guidance for your role' section on the OEAPNG website.

- Guidance for those in a position of Parental Authority

4 Reducing Bureaucracy

NELC is committed to reducing unnecessary bureaucracy and paper work. Planning and recording for Off-site Visits and Adventurous Activities should be proportionate to the level of risk involved.

Local, routine, low risk visits are likely to require minimal planning whereas an expedition abroad will need considerable and detailed planning over an extended period of time.

See sections on:

- [Making effective use of generic risk assessments](#)
- [What information is required and how to manage it](#)

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The following documents may also be of interest:

- [Writing Policies to Reduce Bureaucracy \(OEAP\)](#)
- [HSE School trips and outdoor learning activities: Tackling the health and safety myths](#)

5 Establishment Off-site visits policy

Each establishment must have an Off-site Visits policy. It should be readily available to staff and regularly reviewed. It must be uploaded on to EVOLVE.

When writing an Establishment Off-site Visits Policy it should be understood that all staff must follow their [Employer Guidance](#).

The establishment policy should make reference to the *NELC Requirements for Off-site Visits and Adventurous Activities* ([Employer Guidance](#)) and the [National Guidance](#). It should seek to clarify the arrangements, procedures and responsibilities within the establishment but it should not repeat what has already been detailed in the LA or National guidance.

The EVC should be responsible for ensuring an appropriate Off-site visits policy is in place and regularly maintained and that it is shared with staff along with any subsequent updates.

It is strongly recommended that the section on [Reducing Bureaucracy](#) is considered when writing or reviewing the Establishment Off-site Visits Policy.

The OEAP document [How to write an establishment visits policy](#) should be referred to when writing or updating an establishment Off-site visit policy. An example policy is available at [Educational Visits](#) in the Forms section. A further OEAP document [Writing policies to reduce bureaucracy](#) may also be of interest.

6 EVOLVE visits website

NELC uses the web-based system 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits.

All staff that lead or accompany visits should have their own EVOLVE account, which is set up by their establishment's Educational Visits Coordinator (EVC).

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

This guidance is written to work hand in hand with the Evolve web-based system.

EVOLVE: [Evolve off site reporting system](#)

Please contact your EVC in the first instance or the [NELC Educational Visits Officer](#) for further support and training with EVOLVE.

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7 Approval and notification

Certain categories of visits will require either *Approval* by or *Notification* to the Local Authority (LA). For visits where approval is not required by the LA then the approval is delegated to the Head/Manager.

ALL visits must be approved by the LA/Employer **or** the Head/Manager in advance of the visit in accordance with this guidance.

The approval and notification process within the establishment should be clearly detailed in the Establishment's Off-site Visits Policy.

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7.1 This section at a glance

Level/ Category	Definition of visit	Do these visits need to be recorded on EVOLVE?	Approval process
Level 1	Local, routine, low risk	<p>Yes</p> <p>Recommended:</p> <ul style="list-style-type: none"> One-off 'whole time at establishment consent' (or at least annual consent) generic risk assessment (Reducing paper work while maintaining a proportionate level of planning) 	<ul style="list-style-type: none"> Information provided and recorded by Visit Leader (On EVOLVE) Checked and submitted by EVC Approved by Head/Manager (delegated approval from LA) (Head/manager may delegate approval of Level 1 visits to a suitably competent and experienced member of the senior leadership team – although the Head/Manager still carries the responsibility. Where this arrangement exists it should be clearly stated in the establishments Off-site Visits Policy)
Level 2	<p>Out-of-borough (Any visit involving travel outside North East Lincolnshire)</p> <p>Or</p> <p>In-borough trips that are of a more complex nature (eg large scale sponsored walk; night time theatre visit; involvement in a large scale public event/gathering)</p>	Yes	<ul style="list-style-type: none"> Visit Form completed on EVOLVE by Visit Leader Checked and submitted by EVC Approved by Head/Manager (delegated approval from LA)
Level 3	<p>Overseas</p> <p>Residential</p> <p>Adventurous</p> <p>Student Exchange</p>	Yes	<ul style="list-style-type: none"> Visit Form completed on EVOLVE by Visit Leader Checked and submitted by EVC Authorised by Head/Manager Approved or processed by Local Authority

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7.2 Categories of visits

All visits must be placed in to one of three categories so that proportionate planning can be put in place for the visit relative to the complexity and the level of risk involved.

See the table above for the categories of visits and descriptions.

7.3 Approval Times Required

Where possible visits should be submitted for approval in good time. Staff should be aware that EVCs, Heads/Managers and the LA have other responsibilities as well as visit approvals and that staff should not place undue pressure on colleagues or the LA with regard to visit approvals. The amount of time required to process and approve a visit will depend on the level of complexity. Time must be allowed to consider each visit in detail and request further information or clarification where necessary so that informed decisions and judgements can be made by those responsible for approving visits.

To ensure that visits can be managed effectively the following lead in times should be adhered to:

Level 3 Visits It is recommended that Level 3 visits should be submitted to the EVC by the Visit Leader (via EVOLVE) **at least 6 weeks** prior to the visit date.

The visit should then be Authorised by the Head/Manager and submitted to the Local Authority for approval **at least 28 days** prior to the visit date.

Level 2 Visits It is recommended that Level 2 visits should be submitted to the EVC by the Visit Leader (via EVOLVE) **at least 14 days** prior to the visit date. Establishments may wish to amend this to reflect their circumstances.

Level 1 Visits It is recommended that Level 1 visits should be submitted to the EVC by the Visit Leader (via the Evolve system, along with any other relevant information) **7 days** prior to the visit date. Establishments may wish to amend this to reflect their circumstances.

Establishments should decide what is appropriate for their setting and then include the required approval times in the Establishment Off-site Visits Policy. (Please allow 28 days for LA approval of Level 3 visits.)

Some flexibility will be required to accommodate a degree of spontaneity and pupil/young people led activities, especially with Level 1 visits. Also, although Off-site Visits should normally be part of a planned programme, where opportunities arise at short notice, please contact your EVC as visit approval can usually be fast-tracked so that young people don't miss out on such opportunities.

8 Retention of documents

All Off-site visits planning documentation must be retained until the participants' 25th birthday. The EVOLVE website fulfils these retention requirements. School held records must meet the same retention requirements.

Consent /medical/emergency contact forms should be shredded after the visit unless there has been an incident on the visit, in which case the forms for the whole group are subject to the same retention requirements as the planning documentation.

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9 Planning

9.1 Planning visits

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

The extent of planning required is related to the complexity of the visit. See the following documents for further information:

- [EVC Check list \(OEAP\)](#)
- [Visit Leader Checklist \(OEAP\)](#)
- [Good Practice Basics \(OEAP\)](#)
- [Planning basics \(OEAP\)](#)
- [The Radar Model \(OEAP\)](#)
- [Planning with EVOLVE diagram \(EVOLVE\)](#)
- [Learning Outcomes mindmap](#)

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

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

9.2 What information is required and how to manage it

All establishments must have a clear and robust system for recording visits and visit planning. This should be detailed in the establishments Off-site Visits Policy. Systems should also be manageable and proportionate. (See section [Reducing Bureaucracy](#))

An adequate risk assessment must be in place for all Off-site visits and Adventurous Activities.

Planning and recording for Off-site Visits and Adventurous Activities should be proportionate to the level of risk involved. Local, routine, low risk visits are likely to require minimal planning whereas an expedition abroad will need considerable and detailed planning over an extended period of time.

See sections on:

- [Risk Management](#)
- [Making effective use of generic risk assessments](#)

Level 1 Visits - Information required and how to manage it

It is recommended that Level 1 visits (Local, routine, low risk) are managed in the following way:

- Visit entered on EVOLVE
- One-off 'whole time at establishment consent' (or at least annual consent) – ensuring that blanket parental consent is in place for Level 1 visits
- Generic risk assessment/ standard operating procedures (included within establishments Off-site Visits Policy and uploaded on to EVOLVE or attached to the visit form)
- Event-specific Risk Assessment may be required to record any additional significant issues (eg relating to variables such as the group or the weather). This must be attached to the visit form.

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- Visit Leader holds the following:
 - List of staff and young people on visit
 - Emergency card (including 24hr Emergency Contact details where appropriate)
 - Any other relevant documentation (eg medical/ contact details where appropriate)
 - First Aid kit
 - Any other relevant documentation/items (eg medication/ contact details where appropriate)
- Emergency contact (at the base) holds the following:
 - List of staff and young people on visit
 - Emergency cards (Including Visit Leader contact details while on the visit)
 - Any other relevant documentation (eg medical/ contact details where appropriate)
 - And should have 24/7 access to all Visit details and documentation

All the relevant information must be held on EVOLVE. This may be done in one of the following ways:

- Entering the information on the EVOLVE Visit Form
- Adding a note to the EVOLVE Visit Form
- Attaching documents to the EVOLVE Visit Form

Level 2 & Level 3 Visits - Information required and how to manage it (what must go on EVOLVE)

All Level 2 and Level 3 visits must be entered on EVOLVE. See [‘This section at a glance’](#) for further details.

Please note that the questionnaire completed when adding a visit on the EVOLVE website and the associated one page summary that is seen when a visit is viewed on EVOLVE are referred to as the ‘Visit Form’.

For Level 2 and Level 3 visits all planning details should be recorded electronically and attached to the associated EVOLVE Visit Form. There is no need to keep paper copies of any visit planning. All the documentation will be retained on EVOLVE for the required period of time. (See section [Retention of documents](#)). Establishments should review their procedures in the light of the updated guidance and, in the interests of reducing paper work, any duplication should be avoided.

All relevant information must be included. The following (where applicable) must be attached to the EVOLVE Visit Form:

- Itinerary
- Generic Risk Assessment (**except** where there is a Generic Risk Assessment included in the Establishment Visits Policy which has been upload on to EVOLVE)
- Event-specific Risk Assessment/s (as required)
- Information provided to parents/pupils
- Any other relevant information

This information must be available to view on EVOLVE before approval is granted.

In addition:

- Group list, First Aid kit and mobile phone must be taken on every visit along with medical information and contact details where appropriate.
- The Emergency Contact back at base should hold a Group list including all contact details and the and have 24/7 access to all Visit details and documentation.

9.3 Risk Management

Risk - Benefit Assessment

The starting point of any risk assessment should be the consideration of the benefits and learning outcomes of the visit/ activity. It is important to ensure there is a sensible balance between the benefits and any risks involved. See [Managing Risk in Play Provision](#).

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Three Types of Risk Assessment

Generic Risk Assessment

This is a general risk assessment that covers the significant risks common to all Off-site visits. It should be included in the Establishments Off-site Visits Policy which should be uploaded on to EVOLVE. It is likely that for many Level 1 Visits the establishments Generic Risk Assessment will be sufficient.

Event-specific Risk Assessment

This considers any additional significant issues that are not covered by the Generic Risk Assessment.

On-going Risk Assessment

This is what the staff do on a visit to keep the group safe – ‘*active risk management*’. It involves continuously assessing situations as they unfold and adjusting your response to effectively manage any issues/risks that may arise. This is not a written risk assessment.

Risk management - what is required?

Employers have a legal duty to manage risk and ensure that proportionate (suitable and sufficient) risk management systems are in place.

Staff should have access to appropriate guidance, training and resources specific to the risk management of Off-site Visits.

An adequate risk assessment is required which identifies any significant risks and the control measures required to reduce these risks to an acceptable level.

All risks do not need to be eliminated, indeed low level residual risks are to be expected. Exposure to well managed risk helps children and young people learn important life skills including how to manage risk for themselves. This is endorsed by HSE in [Principles of Sensible Risk Management](#).

It is not always necessary to produce a separate risk assessment for every visit. It is likely that routine, low risk visits will be covered by the establishment's generic risk assessment where as more complex visits will require an additional event-specific risk assessment.

Risk assessments should be:

- Proportionate to the complexity of the visit and the level of risk
- Focused on significant risks
- Carried out by the staff team involved in the visit
- Shared - Relevant information should be shared with those involved, including young people
- Reviewed annually (or after an incident)
- Recorded – the format should be consistent across the establishment

Making effective use of generic risk assessments

In order to help to reduce bureaucracy and encourage consistent good practice it is strongly recommended that a comprehensive generic risk assessment or standard operating procedure is included in the Establishment Off-site Visits Policy. This must then be uploaded on to EVOLVE and made available to all staff.

All staff should be familiar with the Establishment Off-site Visits Policy including the generic risk assessment/standard operating procedures.

Level 1 Visits

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It is expected that routine, low risk visits (Level 1 visits) will be managed using the **establishment's generic risk assessment** which should be included in the Establishment Off-site Visits Policy and uploaded on to EVOLVE.

For Level 1 visits, a routine check of the generic risk assessment to make sure the precautions remain suitable and sufficient is all that may be required. Where additional factors apply such as a group with unusually challenging behaviour; extreme weather; an inexperienced leader; then an event-specific risk assessment may be required to cover any additional issues.

Level 2 & Level 3 Visits

For more complex visits a generic risk assessment from the establishment or the Local Authority may be used as a starting point/prompt sheet with any additional significant issues specific to the visit being recorded on the event-specific risk assessment.

Event-specific risk assessments

It is likely that for many Level 1 Visits the establishments Generic Risk Assessment will be sufficient, however, an event-specific risk assessment may also be required for Level 1 visits where there are additional significant issues to consider that are not covered by the generic risk assessment or where the visit is being undertaken for the first time.

For Level 2 and Level 3 (more complex) visits an event-specific risk assessment must be considered. Any additional significant issues must be recorded along with appropriate control measures. There is no need to repeat any issues already covered adequately on the generic risk assessment.

Please note: Level 3 visits require an appropriate risk assessment to be attached to the EVOLVE visit form before approval can be given.

On-going Risk Assessments

It is what staff do on the visit that keeps the group safe. All staff are responsible for carrying out effective on-going risk assessments based on competence, experience and common sense. Staff teams must be suitably competent and experienced so that they are able to effectively manage any situations they are likely to encounter on the visit.

See section:

[Three Types of Risk Assessment](#),
[Risk assessment forms](#)

It is recommended that the [BPS 4.3.1.F6- Offsite and Educational Visits Risk Assessment Form](#) (this links to the page where the form can be found) is used for recording risk assessments for Off-site Visits. Where alternative formats are used establishments should review them to ensure that they are fit for purpose, simple and easy to use. There is no requirement to record risk assessments in a particular format, however, each establishment should have a set format which is used for all Off-site Visits. This makes it much easier to share risk assessments with staff and also makes it much easier for the EVC and the Head/Manager to monitor visit planning.

Numerical systems and scoring grids should be avoided as they are not fit for purpose when carrying out a risk-benefit assessment. They also overcomplicate what should be a very simple process and take the staffs focus away from the important question of 'What are the really important things we need to do to keep us safe?'

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External Provider Risk Assessments

Visits that include adventurous activities commonly involve delivery by an external provider 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, does not need to be requested from the provider, and does not need to be attached to EVOLVE.

What to consider when carrying out an Off-site visit risk assessment

When considering whether there are any significant risks that need managing it is recommended that staff use the following model:

STAGED:

S taffing	(Including competence, experience, ratios, effective supervision)
T imings	(Timings, itinerary, downtime)
A ctivities	(Programme, activities to be undertaken. Who will lead? Adventurous?)
G roup	(Additional needs: learning, behaviour, disabilities, medical. Challenging group?)
E nvironment	(Venue, accommodation, weather, water levels, crowds, other users, culture)
D istance from base	(Including transport arrangements, support systems, residential visits, visits abroad)

Reviewing risk assessments

Risk assessments should be reviewed and updated in response to any issues that may arise. Where there have been no issues reported, risk assessments should be reviewed on an annual basis with the review date recorded.

Any lessons learned should inform future planning across the establishment. Systems should be in place for sharing any relevant information with colleagues and with the Local Authority where appropriate so that colleagues from other establishments can also benefit.

Risk management checklist for EVCs and Heads/Managers

- Are all staff given training on risk management and risk assessment for Off-site visits?
- Is such training kept up to date (and included in the school induction programme)?
- Is Off-site visit planning, including risk assessments, monitored by the EVC and Head/Manager with appropriate rigour?
- Is there a requirement that the visit leader involves other staff (and young people where appropriate) in the planning and preparation of the visit, including the risk management and the recording of risk-benefit assessments?
- Is there a standardised format for recording risk assessments?
- Are staff encouraged to only record significant risks?
- Are risk assessments proportionate, simple and easy to use?
- Is the bureaucracy minimised by having generic risk assessments in place which are included in the Establishment Off-site Visits Policy as well as making good use of any exemplar risk assessments?
- Are all adults and young people briefed regarding the risk management plan prior to the visit taking place?

For further information on Risk Management see the following documents:

- [Risk Management \(OEAP\)](#)
- [Principles of Sensible Risk Management \(HSE\)](#)

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9.4 Plan B

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.

9.5 Safety during the visit

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

Monitoring of the visit must be on-going, and this contributes towards both enjoyment and safety.

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

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

- [Visit or Activity Leader Responsibilities](#)
- [Visit Leader Checklist \(OEAP\)](#)
- [Good Practice Basics \(OEAP\)](#)
- [Planning basics \(OEAP\)](#)

9.6 Emergency Procedures & Critical Incident Planning

All Establishments should have an Emergency Procedures & Critical Incident Plan **covering off-site visits made by its Establishment**. This should be issued to all relevant senior managers and establishment heads/managers. It should comprise an action plan that can be adapted to deal with any given Critical Incident. The procedures within the action plan should be pre-planned, fully documented and supported by an appropriate training regime, specifically designed to ensure that it is properly understood by the key decision makers. It is good practice to test the system regularly and rigorously.

The Critical Incident Plan should be comprehensive, clarifying the roles and responsibilities required to respond effectively to a Critical Incident. It should explain the roles to be filled rather than assign named staff to a particular role (as individual staff may be unavailable at the time of the incident). Guidance for each role should allow any suitable staff to pick up the task and be effective.

The plan must include a clear point of contact to allow any Visit Leadership Team or Establishment to alert the Employer to a Critical Incident. This Emergency Contact must be able to relay the alert to an appropriate senior manager without delay, who should immediately take charge as Incident Controller until able to pass on this role to a more appropriate person. There must then be an effective communication system to allow the Incident Controller to contact colleagues and initiate the Critical Incident Plan for Off-Site Visits. The Incident Controller will need to be able to swiftly create a support group - a Critical Incident Response Team (CIRT). This response team will need the following capabilities, or access to such capabilities:

- decision making
- resource and logistics deployment and planning
- administrative assistance including record keeping
- communications
- media management.

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Depending on the nature of the incident, the CIRT will need to be able to:

- gain direct and immediate access to an effective communication system/network that will enable contact with the establishment/setting/group affected as well as with other colleagues and external agencies.
- call upon support and resources at corporate level and possibly among external agencies.
- despatch a Travelling Team with the resources to provide direct support, both at the establishment and at the venue of the group in crisis.

The Critical Incident Plan should include contact details for all of the people who may be needed when a Critical Incident occurs.

All Establishments should be familiar with the ‘Specific guidance for Emergencies’ which can be found by accessing the [OEAPNG website](#)

9.7 Staffing, ratios and effective supervision

Early Years Groups

Ratios for Early Years are specified and must be adhered to, see [Statutory Framework for the Early Years Foundation Stage](#). However, staff should be aware that the specified ratios may not be adequate to provide effective supervision on Off-site visits.

All establishments

Visits must have ‘**effective supervision**’ in place that has been approved by the EVC and Head/Manager.

For all visits the visit leader, EVC and Head of establishment will 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 and requirements of individuals within the group, including those with additional needs
- the experience and competence of staff and other adults
- the venue, time of year and prevailing/predicted conditions
- the contingency, or ‘Plan B’ options

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

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

Refer to OEAP documents: [Ratios and effective supervision \(OEAP\)](#)
[Underpinning Legal Framework and Duty of Care](#)

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.

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 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’

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Refer to OEAP documents: [Group management and supervision](#)
[Vetting and DBS Checks](#)

9.8 Remote Supervision

Young people must be supervised **throughout** all visits. At times they may be unaccompanied by a member of staff or other responsible adult, eg. DofE expeditions, 'down time' in a shopping mall, etc. This is known as 'remote' supervision.

'Remotely supervised' activities can bring purposeful educational benefits, and the progression from dependence to independence is to be encouraged.

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

The decision to allow remote supervision should be based on professional 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

Refer to OEAP documents:

- [Group Management and Supervision](#)
- [Remote Supervision and Downtime FAQ](#)

9.9 Competence to lead

The competence of the visit leader is the single most important factor in keeping the group safe.

The EVC and/or Head of Establishment must therefore consider the following when assessing the competence of a member of staff to lead a visit:

- What experience has the leader in leading or accompanying similar or other visits? (check Visit History on EVOLVE).
- Is the leader competent in planning and managing visits?
- What are the leader's reasons for undertaking the visit?
- Is the leader an employee of the local authority?
- Does the leader have the ability to manage the pastoral welfare of participants?
- Does the leader exhibit sound decision making abilities?
- What experience has the leader of the participants he/she intends to supervise?
- What experience has the leader of the environment and geographical area chosen?
- Is the leader fully aware of their abilities and limitations?
- Does the leader possess appropriate qualifications?
- If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- If leading adventurous activities, has the leader been 'approved' by the LA?
- Is the leader aware of all relevant guidelines and able to act on these?

Refer to OEAP document: [Assessment of Competence](#)

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Refer to diagram: [Planning with EVOLVE](#)

9.10 Learning Outcomes / Purpose of visit

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 can make a positive impact in helping to raise attainment, attendance and behaviour. Learning Outside the Classroom can also provide opportunities for development in other areas, including:

- Environmental
- Cross curricular
- Emotional & spiritual
- Relationships
- Communication
- Independence
- Resilience
- Self confidence
- Teamwork

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 OEAP documents: [Rigorous Evaluation of LOtC meeting Ofsted expectations](#)
[Planning Basics for Outdoor Learning, Off Site Visits and Learning Outside the Classroom](#)
[Learning Outcomes Mind Map](#)

[High Quality Outdoor Education](#) can be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place.

9.11 Evaluating visits

Visits should be evaluated with the outcomes informing future planning. All stakeholders should be considered when carrying out evaluations. There is the opportunity to use the evaluation tool on EVOLVE which enables staff to comment on the learning outcomes identified on the EVOLVE visit form.

Refer to OEAP document: [Rigorous Evaluation of LOtC meeting Ofsted expectations](#)

9.12 Pre-visit

A pre-visit is recommended wherever possible and in some instances may be considered essential. Where a pre-visit is not practicable it may still be possible to manage visits effectively. It may also be acceptable to manage visits without a pre-visit if a Tour Operator is providing a guide or has someone in place who can offer support, advice and local knowledge.

A pre-visit can promote the provision of a high quality learning experience allowing staff to focus on the young people and their learning rather than having to focus on issues such as where to cross the road or where to eat lunch if it's raining.

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By gathering information and seeing things on the ground, a pre-visit can help to ensure that factors such as the venue, activity and the provider are appropriate and that the provision meets the needs of the group.

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

9.13 External Provider/ Tour Operator

When choosing a new provider first-hand experience or word of mouth is often the best approach. Staff may wish to contact the [NELC Educational Visits Officer](#) for advice or search on EVOLVE for other schools who have used the same provider and contact the visit leaders for their views.

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

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

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

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc
- Campsite
- Museums, galleries, etc
- Tourist attractions
- Theme Parks
- Farms
- Coach, Train, or Airline company
- Swimming Pool
- Climbing Wall where instruction is provided by a member of your establishment's own establishment staff with an approved Activity Leader Form (ALF) (adventurous)

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.

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

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
- b) A [Provider Form](#) Form/EVC/Prov has been satisfactorily completed by the provider

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

Learning Outside the Classroom (LOtC) Quality Badge

Using a provider holding the LOfC Quality Badge helps schools to reduce red tape because “*possession of a LOfC Quality Badge shows that the organisation has been externally validated and that their health and safety has been checked. This removes the need for the leader to carry out additional checks*”. For providers who do not hold a LOfC Quality Badge, the visit leader must complete an additional checklist, checking with the provider on issues such as verification of staff qualifications, etc. Details of the badge and a list of holders can be found at www.lotcqualitybadge.org.uk.

Provider Form

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

Procedure:

- Download an **Provider Form** Form/EVC/Prov.
- Complete the top section.
- Send Provider Form to the provider (email, fax, post).
- On its return check that it has been satisfactorily completed.
- Keep Provider Form on file together with all other relevant documentation – preferably attached to the visit form on EVOLVE.

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

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.

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

Refer to OEAP documents:

[Inclusion](#)

[Special Educational Needs and Disabilities](#)

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9.15 Parental Consent

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'.

To help reduce paperwork, comply with best practice and maintain parental confidence NELC strongly recommends that establishments adopt the following criteria:

- **Regular, routine off-site visits/activities in normal curriculum/programme time**
Regular, routine off-site visits/activities in normal curriculum/programme time do not require parental consent, however, most schools continue to seek blanket consent for Level 1 visits (regular, routine off-site visits/activities).
The following two options are recommended for obtaining 'Blanket consent' for Level 1 visits:
 - Annual consent OR
 - One-off consent on enrolment to cover the time at the establishment
- **Regular, routine off-site visits/activities out of normal curriculum/programme time**
Consent is required where Level 1 visits take place out of normal curriculum/programme time. This may be blanket consent or individual visit consent depending on the nature of the visit and the procedures outlined in the establishment's visits policy.
- **Other visits**
For other visits (including residential, adventurous, those involving significant distance from base and activities for which a charge is made) 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 visits - establishments should send parents information about each visit or activity before it takes place.** This may be a useful opportunity to remind them if they have given consent and to give them an opportunity to withdraw it.

All establishments must have systems in place to gather and update any relevant personal, medical and emergency contact details. Such systems should be separate from blanket consent forms as such information is likely to change and need updating over time. Any such information that is relevant to visits/activities must be made available to visit leaders. Relevant information may still be requested on one-off consent forms to ensure that visit leaders have up to date information.

Refer to OEAP document: [Consent](#)

9.16 Transport

General considerations and effective supervision during journeys

Care should be taken to assess the maturity and the needs of the group, the competence and experience of the staff, as well as the distance from base so that the Visit Leader, EVC and Head/Manager can be confident that 'effective supervision' is in place.

Refer to OEAP documents: [Transport General Considerations](#)
[Transport in minibuses](#)
[Transport in private cars](#)
[Supervising passengers - minibuses and cars FAQs](#)

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Seat belts

Seat belts must be worn at all times on all vehicles where seat belts would normally be expected, including cars, minibuses, coaches and buses – with the exception of public transport. Establishments should only commission vehicles with appropriate seat belts fitted.

Minibuses

Minibus Training

NELC requires that all drivers of minibuses successfully complete training recognised by the Local Authority such as MIDAS. Any training must be kept up to date.

Establishments should consider staff maturity/age and any penalty points held before allowing staff to drive the minibus.

Legal Requirements and Supervision

Drivers must ensure that all relevant legal requirements are met and that appropriate supervision is in place. Please refer to [Transport in minibuses \(OEAP\)](#) for further details.

Establishments that own or hire a minibus must have a minibus policy in place that covers:

- roles and responsibilities
- driver requirements
- insurance
- accident/ breakdown procedures
- emergency procedures
- maintenance schedules
- supervision
- operational procedures.

Section 19 Permit (Minibus Permit)/ Public Service Vehicle (PSV) Operator's Licence

All establishments **must** operate under a section 19 Permit which allows vehicles to be operated for hire or reward without a full Public Service Vehicle Operator's licence and allows category B licence holders to drive minibuses. A Section 19 Permit is required for each minibus in service.

Otherwise establishments will need a full Public Service Vehicle (PSV) operator's licence.

Please refer to section 4 of [DVLA Driving a minibus \(INF28\)](#) for further details.

To drive a vehicle under a Section 19 permit:

- Staff must have passed a car test before 1st January 1997 and hold licence category D1 with code 101
- or**
- Staff must have passed a car test (category B entitlement) after 1st January 1997 **and** meet the following conditions for driving a minibus on a voluntary basis:
 - Drivers are over 21
 - Category B licence has been held for at least 2 years
 - The minibus is being used by a non-commercial body for social purposes
 - Drivers are providing their service on a voluntary basis – they are not paid specifically to drive the minibus, other than out of pocket expenses, and cannot be compelled to drive by their employer (check contracts and job descriptions)
 - The minibus does not exceed 3.5 tonnes Maximum Authorised Mass (or 4.25 tonnes with specialist equipment for the carriage of disabled passengers)
 - No trailer is towed
 - The vehicle is within the UK

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If any of the above provisions are not met then D1 Passenger Carrying Vehicle (PCV) entitlement is required (obtained by taking an additional PCV test).

Further Information

For further information please refer to the following:

OEAP document:	Transport in minibuses (OEAP)
DVLA information leaflet:	Quick Guide to Driving a minibus (INF241)
DVLA information leaflet:	DfT/ DVLA Driving a minibus (INF28)
ROSPA document:	ROSPA Minibus Safety: A Code of Practice 2008
Useful website:	Community Transport Association UK (www.ctauk.org)

Coaches/ minibuses with drivers

There is no approved list of coach companies. Establishments must take steps to ensure that only reputable companies are used and that the vehicles provided appear to be in good order and fit for purpose. Drivers should be competent with DBS checks in place.

Refer to OEAP document: [Transport General Considerations](#)

Buses - private hire

Buses (eg double/single decker buses) should be avoided where possible and if used then they should be fitted with seat belts and only used for short, local, urban journeys where speed limits are low. They are **not** suitable for longer journeys or where motorways or faster roads are used.

Staff should also consider the age/ size of the children and young people. Smaller children (eg Early Years and Infants in particular) may have faces level with the metal bar/handrail on the back of the seat in front which if lap belts are fitted may present serious issues in the event of an emergency stop or accident.

Public transport

Public transport can reduce the cost of visits. It can also be a learning experience in itself, especially where young people are involved in planning the journey themselves.

When planning to use public transport staff should contact the company involved to pre-book tickets or if no tickets are needed (eg on a bus) to ensure that the transport provider is happy with the intended arrangements and the numbers traveling in the group.

Staff/ pupil ratios may need considering when using public transport to ensure that effective supervision is maintained at all times. A higher staff ratio may be required to manage this mode of transport.

A pre-visit would normally be expected so that the visit leader is familiar with the route and where to get on and off.

Refer to OEAP document: [Transport General Considerations](#)

9.17 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).

A course such as the Emergency First Aid at work (1 day) course may be suitable for routine urban visits, however the nature of the visit may indicate that a higher level qualification is appropriate (eg a 2 or 3 day

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qualification), 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 Visit Leader/EVC/Head should make a professional judgement regarding the level of first aid required. However any residential visit or adventurous activity should be accompanied by, or have access to, a qualified first aider. For residential visits the first aid cover must be available 24/7.

A first aid kit appropriate to the visit should be carried, and there should always be someone who is nominated to deal with first aid issues.

The first aid requirements relating to EYFS settings are specified and must be adhered to, see [Statutory Framework for the Early Years Foundation Stage](#)

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

9.18 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.

9.19 Insurance

It is the Head's/Manager's responsibility (on behalf of the employer) to ensure that appropriate insurance cover is in place to cover staff, volunteers and children participating in Educational Visits.

School Journey/Travel Insurance

A 'blanket' annual policy is now available to schools where a one off payment covers all visits. It is strongly recommended that this is taken out. Contact the NELC Insurance Department for further details.

Where the 'blanket' policy is not taken out then the School Journey Insurance must be applied for on a visit by visit basis. Where this is the case the following criteria apply:

- Must be taken out for all overseas/foreign visits.

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- Recommended where:
 - visits involve significant financial commitment
 - visit are more complex or higher risk

For example:

- Residential
- Significant distance from base
- Heads/Managers may choose to cover other types of visits as well where they feel this maybe appropriate.
- Please note that where School Journey/Travel Insurance has not been taken out then establishments would have to cover the costs of any financial losses or additional costs.

Public Liability Insurance

Public Liability insurance indemnifies the employer against all claims for compensation for bodily injury from persons not in its employ and 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 should cover activities such as off-site activities and visits organised by all establishments and setting for which the employer is responsible.

This covers children/young people and staff on visits in the same way as it does in the establishment. For example with school groups they have the same insurance cover out on a visit as they do in school. However consideration should be given as to whether additional insurance is required when groups are out on visits.

9.20 Charging for activities/ visits

Refer to OEAP document: [Charges for Off Site Activity](#)

10 Monitoring

Refer to OEAP document: [Monitoring](#)

11 Adventurous Activities

11.1 Definition of Adventurous Activities for the purpose of this document

Adventurous Activities include activities which are considered to have a higher potential level of risk associated with them and would normally require a specifically competent/ trained/ experienced person to lead the activity.

11.2 Exemplar list of Adventurous Activities

Please note that this is not a definitive list. If you are unsure whether or not your activity is adventurous then please contact the [NELC Educational Visits Officer](#) for further clarification and advice.

Activities regarded as 'adventurous' and requiring LA approval include:

- All activities in 'open country'. See section on [Walking – Adventurous or non-adventurous?](#)
 - Swimming (all forms, excluding publicly lifeguarded pools)
 - Camping

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- 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 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
- Other activities (eg. initiative exercises) involving skills inherent in any of the above

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

a) **An external provider** - see the section on [External Provider/ Tour Operator](#)

or

b) **A member of your establishment's staff** - see the section on [Approval of establishment staff to lead Adventurous Activities](#). This person must be specifically approved by the LA to lead the activity, via EVOLVE.

12 Approval of establishment staff to lead Adventurous Activities

Staff who wish to **lead** (ie. supervise or instruct) an adventurous activity, as defined in the section [Exemplar list of Adventurous Activities](#), 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.

12.1 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**

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- 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.

13 Walking – Adventurous or non-adventurous?

Walks in parks or on non-remote country paths below 300m are not regarded as adventurous and therefore do not require approval by the Local Authority.

13.1 Open country activities (when does a simple walk become adventurous?)

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.

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

Self-led walks to local venues, such as walking the Viking way, are to be encouraged by those with walking experience and previous knowledge of the route. There are some issues that need to be covered, such as remote nature of the routes (no ambulance access) and the required level of First Aid. Also the group kit carried by the leader and the possibility of poor weather and poor visibility. Group members clothing and footwear also need considering. Please contact the [NELC Educational Visits Officer](#) for further details or enter the visit details on EVOLVE as an 'Adventurous' visit led by establishment staff.

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

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

- For leaders of walking groups in mountainous terrain within the UK and Ireland**
 - Mountain Leader Award (Summer or Winter as appropriate) www.mltuk.org and a

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- A written statement of competence by an appropriate technical adviser - see the section on [Approval of establishment staff to lead Adventurous Activities](#)
- 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 **and a**
 - A written statement of competence by an appropriate technical adviser - see the section on [Approval of establishment staff to lead Adventurous Activities](#)
- 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:
 - Lowland Leader Scheme
 - Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL). This is appropriate for leading groups in lowland areas, and for organising base and mobile camps. See www.bst.org.uk
 - Completion of a 'Leader Training' Course such as Country Side Leader Award
 - A written statement of competence by an appropriate technical adviser see the section on [Approval of establishment staff to lead Adventurous Activities](#)
 - Evidence of recent, relevant experience, appropriately corroborated.

14 Swimming

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

Particular consideration should be given to the following factors:

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

Young people must be supervised by a competent adult at all times whilst undertaking swimming activities.

14.1 Swimming pools - lifeguarded (non-adventurous)

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.

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14.2 All other swimming pools – including hotel pools(adventurous)

Establishments should check the lifeguarding position in advance.

LA Approval is not required for this activity if qualified lifeguarding is provided at the pool.

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 (NRSTAC) or equivalent. See www.lifesavers.org.uk **or**
- A valid RLSS UK National Water Safety Management Programme (NWSMP), with appropriate endorsement. See www.lifesavers.org.uk

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 LA establishment's staff.

14.3 Open water swimming eg. river, lake, sea (adventurous)

LA Approval is required via EVOLVE.

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**

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For structured or programmed activity:

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

15 Activities near or in water

15.1 Water margin activities – activities near/next to water (non-adventurous)

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.

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

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

At the outset the establishment must decide whether the activity:

- a) Falls **within** the definition in bold above - in which case the below guidance applies,
- b) **Exceeds** the definition in bold above - in which case this is a [Water based activities – activities in/on water \(adventurous\)](#).

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

As with all visits, where appropriate there should be an approved alternative 'Plan B' that could be used where conditions dictate (eg water levels too high), 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.

15.2 Water based activities – activities in/on water (adventurous)

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

- Swimming in publicly lifeguarded pools – see the section on [Swimming pools - lifeguarded \(non-adventurous\)](#)
- Water-margin activities as defined in the section - [Water margin activities](#) – activities near/next to water (non-adventurous)
- 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.

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Any establishment staff wishing to lead Water Based activities 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:

- 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.

16 Snowsports

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

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.

There are advantages to snowsports taking place during term time as opposed to during the establishment holiday period. These include: greater choice, 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 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.

16.1 Supervision on the slopes

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

When considering supervision on the slopes the following points must be taken in to account:

- All participants must receive instruction from qualified instructors. This should be for at least 4 hours a day split between the morning and the afternoon. The instructors must be able to communicate effectively with the group and should have good English unless MFL development is a particular aim of the visit.

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Where participants are to receive instruction from any instructors that are **not** provided by the registered local ski school then the EVC/Visit Leader should contact the **NELC Educational Visits Officer** to confirm that any instructors to be used are competent, appropriately qualified and carry adequate insurance cover.

- Although the instruction will be in the hands of the ski school instructor, the visit leader and the other accompanying staff retain responsibility for monitoring the organisation of the lessons, the quality of instruction and the behaviour and wellbeing of the young people.
- The visit leader or another member of staff on the visit should accompany (ski with) each of the lesson groups. This should include being directly involved in supervising the groups during lunch times/breaks.

Where this is not possible all groups must be effectively monitored on a frequent and regular basis. Where any such alternative arrangements are necessary (except where they are imposed during the visit eg due to illness/injury) they should be discussed with the **NELC Educational Visits Officer** prior to departure.

- Any staff intending to lead groups on the snow must hold an appropriate qualification (eg The Alpine Ski Course Leader Award (ASCL) www.snowsportengland.org.uk), a 2 day Outdoor First Aid qualification and have been approved by the LA via EVOLVE - see the section on [Approval of establishment staff to lead Adventurous Activities](#). Staff must always operate within the remit of their qualification. Any such activities must be in addition to the instruction provided by the ski school instructors. This would normally involve an appropriately qualified member of establishment staff leading a small group of young people for an extra hours skiing after their session with the ski instructor has finished.
- Young people must not participate in off-piste activities.
- If there are any problems with lessons or equipment the visit leader or accompanying staff should raise the issue(s) with the instructor, ski school, ski hire shop or tour operator's representative immediately.

16.2 Helmets

All participants including staff should wear a helmet while taking part in snowsports. In some countries this is a legal requirement for young people.

16.3 Preparation

A course of ski/snowboard lessons and fitness training is highly recommended prior to the trip, if possible using an indoor snow slope or a dry ski slope. This will help to familiarise the group with the equipment and provide the opportunity to learn some of the basics (or rediscover their ski legs), helping the young people to get the most out of the visit.

16.4 Clothing

Good clothing and equipment are fundamental to the safety and enjoyment of a ski course. It is recommended that appropriate spare equipment is carried within each sub-group.

16.5 USA & Canada

Important: Owing to unacceptable liability waiver requirements, currently LA establishments should 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 OEAP document: [Snow Sports Visits](#)

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17 Other Visits

17.1 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.

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

Refer to OEAP document: [Residential Visits Mindmap](#)

17.2 Farm Visits

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

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

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

17.3 Duke of Edinburgh (DofE) Expeditions and Training

DofE training and expeditions must be entered on EVOLVE like any other visit. On EVOLVE they must be categorised as 'Adventurous led by establishment staff' and will require approval by the Local Authority. This is in addition to any paper work submitted to the NELC Operating Authority and any Wild Country Panels.

Refer to OEAP document: [DofE Award expeditions](#)

17.4 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.

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

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

- 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.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: www.fco.gov.uk ('Home' page, 'Travel & Living Abroad', 'Travel Information by Country'). 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). See www.dh.gov.uk

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

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Refer to NELC: [Alcohol & Drugs policy](#).

17.5 Exchange Visits

For exchange visits:

- The LA has adopted the Outdoor Education Advisers' Panel guidance document: [Young People's Exchange Visits](#) LA establishments are required to adhere to all relevant aspects of this guidance.
- Refer to the British Council (Learning) www.britishcouncil.org
- Refer to OEAP document: [Exchanges & home-stays](#)

17.6 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.

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

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

There are stringent requirements on Overseas Expedition providers, and establishments may therefore need to allow up to 18 months for 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.

There is a British Standard BS8848 against which an expedition provision can be benchmarked, either by the client or by the provider. The non-statutory Council for Learning Outside the Classroom (LOtC) Quality Badge for Overseas Expeditions gives an assurance for both safety and quality of provision. Overseas expedition providers are required to comply with the minimum standards specified in this document.

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 British Standard BS8848

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.

Establishment staff accompanying the expedition should ensure that they fully understand their role before any contracts are signed. **Regardless of any terms or conditions, it is the establishment staff who will retain the overarching duty of care for the young people.** Establishment staff should attend the expedition as employees of their local authority or establishment. They should **not** sign a separate contract with the provider.

The contract establishing the booking should be between the establishment and the provider. The establishment should ensure that they retain financial control of the contract by collecting monies due. Where parents make any direct payments to the provider, there should be a separate written statement or 'Memorandum of Understanding' between the provider and the establishment that ensures the establishment retains control of the venture.

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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

Please ensure that the following OEAP documents are also used by all staff planning overseas expeditions:
[Overseas Expeditions](#)

It should be noted that this document has been designed to be used electronically so that all the links and references can be accessed. It is also updated on an on-going basis. Please ensure that the latest version is being used which is available from [Educational Visits](#). (Check the version reference number which can be found at the bottom of each page.)