# Further Guidance for Offsite Activities

## Outcomes

1.1 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.

1.2 Experiential learning can also provide opportunities for development in other areas, including:

* **R**elationships
* **E**motional & spiritual
* **C**ross curricular
* **I**ndividual
* **T**eamwork
* **E**nvironmental.

1.3 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: ‘[Evaluation](http://oeapng.info/downloads/policies-planning-and-evaluation/)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

1.4 [High Quality Outdoor Education](http://www.national-library.info/download.asp?fileid=483) can be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. It can also help the leader in providing clarity to a provider when designing a programme.

1.5 Evaluation - Refer to: ‘[Evaluation](http://oeapng.info/downloads/policies-planning-and-evaluation/)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/). It is recommended that schools set up a clear process for evaluating all visits once they have been concluded from the planning through to the visit itself. Schools should keep a record of any incidents, accidents and near misses. This will help the school:

* evaluate whether its planning has worked
* learn from any incidents which took place.

## Inclusion

2.1 Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. You are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Equality Act does not require responsible bodies to place employees or participants at greater risk if a health and safety concern 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.

2.2 Refer to: ‘[Inclusion’](https://oeapng.info/download/1086/) in National Guidance [OEAP National Guidance.](http://www.oeapng.info/)

## Planning

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

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

* [Planning with EVOLVE](http://www.national-library.info/download.asp?fileid=1093) diagram.
* RADAR model: based on STAGED: Staffing, Timings, Activity, Group, Environment, Distance. - [The Radar Introduction](https://oeapng.info/downloads/download-info/1d-the-radar-introduction/)

3.3 Sometimes an establishment may need to review current plans or arrangements that were successful on previous trips. All trips will need risk assessments, details planning and informed approval of headteachers or governing boards. The person given the role of managing this should:

* have the [skills, status and competence needed for the job](https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits#educationalvisistscoorindator)
* understand the risks involved
* be familiar with the activity.

3.4 Plans should be proportionate and sensible, focusing on how to manage the risks.

Risks are expected to be reduced to an acceptable or tolerable level, and not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity. See [Managing Risk in Play Provision](http://www.national-library.info/download.asp?fileid=1345).

3.5 Many aspects of planning will normally already be in place in the form of existing policies and guidance, such as the establishment’s own 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.

3.7 Due to the complex nature of off-site visits, conventional ‘risk assessment’ as a stand-alone tool is not particularly useful and can on occasion be misleading. It is of greater benefit to consider the overall ‘risk management’ of visits by taking all aspects of visit planning and management into account. This can be achieved effectively through a combination of the EVOLVE Visit Form itself, and any appended notes and/or attachments.

3.8 Visit planning includes consideration of the question: ‘What are the really important things that we need to do to keep us safe?’ It should focus on those issues that are individual to the specific event, taking into account the needs of the group (including special and medical needs), the experience and competency of the staff team, and the leader in the context of the event. Significant issues should be recorded on EVOLVE, either in Notes or as an attachment, and shared with all relevant parties.

3.9 Planning that includes adventurous activity commonly involves delivery by an external provider and the provider will have responsibility for 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 uploaded to EVOLVE.

3.10 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.

3.11 Schools using an outside organisation to provide an activity must check they have appropriate safety standards, safeguarding procedures and liability insurance. The Council for Learning Outside the Classroom (LOtC) awards the [Learning Outside the Classroom Quality Badge](http://lotcqualitybadge.org.uk/) to organisations who meet nationally recognised standards. Schools can [check if an organisation holds the LOtC Quality Badge](http://lotcqualitybadge.org.uk/search).

3.12 If an organisation does not hold the badge, the school must check that they’re an appropriate organisation to use. This could include checking and collating evidence of:

* their insurance
* that they meet legal requirements
* their health and safety and emergency policies
* their risk assessments
* their control measures
* their use of vehicles
* staff competence
* safeguarding arrangements
* accommodation suitability and standards
* any sub-contracting arrangements they have
* that they have a license where needed.

The school should have an agreement with them that makes it clear what everyone is responsible for. This is especially important if they’ll be taking over supervision of the children. This information should be included in details of any trip put on the EVOLVE Provider Form or evidenced by a separate note on the visit form. A template Provider Form is located under “Resources” on EVOLVE.

3.13 It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions and will become more ‘risk aware’ and hence at less risk. They will also have greater ownership of the event.

3.14 Examples of generic offsite risk assessments can be found in EVOLVE Resources. The Risk Assessment Code of Practice can also be found in EVOLVE Resources - this is endorsed by HSE in [Principles of Sensible Risk Management](http://www.national-library.info/download.asp?fileid=1335). An example [Alcohol & Drugs](http://www.national-library.info/download.asp?fileid=1563) policy is in EVOLVE Resources; establishments may wish to adapt and/or adopt this if appropriate.

3.15 Refer to:‘[Responsibilities of the Visit Leader](http://oeapng.info/visit-leader/)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/) DfE document: [A Handbook for Group Leaders](http://www.national-library.info/download.asp?fileid=465).

## Safety During a Visit

4.1 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.

4.2 Monitoring of the visit must be ongoing; this contributes towards enjoyment, safety, and learning.

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

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

4.5 Refer to:‘[Responsibilities of the Visit Leader](http://oeapng.info/visit-leader/)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/) DfE document: [A Handbook for Group Leaders](http://www.national-library.info/download.asp?fileid=465).

## Parent/Carer Consent

### 5.1 When is parental consent necessary?

Written parental consent must be obtained for all official activities which take pupils off the school site and in particular:

* Extended day visits
* Journeys and visits lasting more than twenty four hours
* Visits involving an overnight stay
* A journey by air or sea
* Any journey outside the UK
* All visits involving hazardous activities.

### 5.2 Day activities within the locality

In the case of activities within the locality or are less than twenty-four hours duration and not involving hazardous activities but where the pupils will be off the school site for a considerable part of the school day it is still recommended that parental consent should be obtained. It is also recommended that parental consent should be obtained for any activity which parents might regard as unusual.

### 5.3 Repeated activities - consent

Where a series of short visits are to be made over a period of weeks e.g. swimming lessons or community work, one consent should be sufficient for the whole series. Such consent should not be allowed to extend over more than one year and may be required over a shorter period such as every term. It might be necessary to ensure that medical information is kept updated in such cases.

### 5.4 Parental consent and medical form

The Parental Consent should be used in all cases where full consent is to be obtained including any medical information and medicines. It must have all necessary information attached to it when it is given to parents.

More information can be found in Supporting Pupils with Medical Conditions Policy in EVOLVE Resources.

Consent for school trips and other off-site activities - GOV.UK (www.gov.uk)

[OEAP National Guidance Good Practice](https://oeapng.info/downloads/good-practice/)

### 5.5 Medical Consent

This should form part of the parental consent form. Parents should be asked to agree to the pupil’s receiving emergency treatment, including anaesthetic and or transfusion of blood or blood associated products as considered necessary by the medical authorities.

Doctors can be expected to carry out necessary emergency treatment without parental consent, but it is possible that a surgeon in another country might be reluctant to operate on a pupil unless assured that the group leader had authorisation to agree to such treatment. When travelling abroad it is sensible to include a transaction of the medical consent in the relevant foreign language.

Where parents withhold medical consent for a pupil participating on an activity it **must be** agreed with parents that any of its establishments or employees or volunteers assisting in the execution of its statutory duties cannot be held responsible for circumstances that might arise through not receiving medical care.

Furthermore, parents **must** undertake to be contactable at all times in the event of an emergency so that any responsibility for decisions affecting their child can be made by them and not the school staff.

Refer to: ‘[Parental Consent](https://www.google.com/url?q=http://oeapng.info/download/1264/&sa=U&ei=uQN6UpTXH)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

## Competence to Lead

6.1 The competence of the visit leader is the single most important contributory factor in the safety of participants.

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

a) What experience has the leader in leading or accompanying similar or other visits? (check Staff History on EVOLVE).

b) Is the leader competent in planning and managing visits?

c) What are the leader’s reasons for undertaking the visit?

d) Is the leader an employee of the local authority?

e) Does the leader have the ability to manage the pastoral welfare of participants?

f) Does the leader exhibit sound decision making abilities?

g) What experience has the leader of the participants he/she intends to supervise?

h) What experience has the leader of the environment and geographical area chosen?

i) Does the leader possess appropriate qualifications?

j) If appropriate, what is the leader’s personal level of skill in the activity, and fitness level?

k) If leading Adventurous Residential and Overseas activities, has this been ‘approved’ by the LA?

l) Is the leader aware of all relevant guidelines and able to act on these?

m) Is the leader good in dealing with emergency situations? Does he or she have any experience and is able to remain calm in such a situation?

Refer to:‘[Assessment of Competence](https://www.google.com/url?q=http://oeapng.info/download/1084/&sa=U&ei=BQR6UqCqENPw0gWGkICACw)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

Diagram: [Planning with EVOLVE](http://www.national-library.info/download.asp?fileid=1093).

## Staff and Supervision

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

7.2 The Statutory Framework for the Early Years Foundation Stage (available on EVOLVE) no longer differentiates between outings and on-site settings as regards to minimum specified ratios.

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

* the type, level, and duration of activity;
* the nature 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, if applicable;
* the contingency, or ‘Plan B’ options.

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

7.5 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. See Underpinning Framework on National Guidance [OEAP National Guidance](http://www.oeapng.info/).

7.6 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.

7.7 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.

7.8 Vetting and Disclosure and Barring (DBS) Checks

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

7.8.2 - ‘frequently’ is defined as ‘once a week or more’.

7.8.3 - ‘intensively’ is defined as ‘four or more days in a month, or overnight’.

7.8.4 Headteachers need to ensure that they are satisfied with the Safeguarding arrangements of the provider and follow their Safeguarding Policy.

7.8.5 Refer to: ‘[Vetting and DBS Checks](https://www.google.com/url?q=http://oeapng.info/download/1090/&sa=U&ei=LAR6UpWZHO)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

7.9 Direct, Indirect and Remote Supervision

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

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

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

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

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

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

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

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

Refer to the following documents in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

‘[Ratios and Effective Supervision](https://www.google.com/url?q=http://oeapng.info/download/1142/&sa=U&ei=WgR6Ut)’

‘[Group Management and Supervision](https://www.google.com/url?q=http://oeapng.info/download/1138/&sa=U&ei=dAR6Us-REeKt0QXtzYGwAw&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNGe_HyMu7CUoHe4dpMVrtBn04wp0Q)’

‘[Vetting and DBS Checks](https://www.google.com/url?q=http://oeapng.info/download/1090/&sa=U&ei=LAR6UpWZHO).’

## First Aid

8.1 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).

8.2 It is recommended that someone with ’Appointed persons first aid training’, that includes pediatric considerations, be present on a trip as a minimum.

8.3 However, the nature of the visit may indicate that a higher-level qualification is appropriate, especially in circumstances where it is likely that access by the emergency services may be delayed. This should be determined through the risk assessment process.

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

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

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

Refer to: ‘[First Aid](https://www.google.com/url?q=http://oeapng.info/download/1148/&sa=U&ei=wAR6Uob_I-Kc0AWgh4DADg&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNGfjM2yAQjCLciH5l8NdZpJVBJyGw)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

[Statutory Framework for the Early Years Foundation Stage](http://www.national-library.info/download.asp?fileid=1273)

First Aid Code of Practice EVOLVE Resources

## Insurance

9.1 Schools which purchase their insurance through the Council's Insurance School Service Agreement are automatically insured for Personal Accident and Travel insurance. Also, employers and public liability policies are fully operative to indemnify the school in the event of personal injury claim being brought against the school. Schools should be aware that the Council's personal accident and travel policy does not cover winter sports or any aerial activity (other than as a passenger on a commercial airline) and schools should purchase appropriate insurance or such activities. Further information regarding insurance can be obtained from:

Name: Philip Watkins

Position: Risk and Insurance Manager

Telephone: 07411810934

E-mail: [Philip.Watkins@slough.gov.uk](mailto:Philip.Watkins@slough.gov.uk).

9.2 This insurance is only available to schools that buy the insurance service from the Council. Schools that place their insurance arrangements elsewhere will need to ensure that those arrangements include school journey cover.

9.3 For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See Department of Health and Social Care - GOV.UK (www.gov.uk).

9.4 Fair Presentation of Risk

9.4.1 Under the Insurance Act 2015 the council (as policyholder) has a duty to make a fair presentation of the risk, and to disclose all material circumstances. It is necessary to disclose all information which would influence the judgement of a prudent insurer in determining whether or not to accept a risk, and upon what terms.  Failure to comply with this duty may give the insurer the right to void the policy from its inception, or to impose different terms, or to reduce the amount paid on any claim.

9.4.2 Due to Brexit EHIC (European Health Insurance Card) are only valid until their expiry date. After this date you can no longer use them. However, individuals can apply for, the GHIC (Global Health Insurance Card). The government plans that the GHIC will slowly replace the EHIC card. See [Applying for healthcare cover abroad (GHIC and EHIC)](https://www.nhs.uk/using-the-nhs/healthcare-abroad/apply-for-a-free-uk-global-health-insurance-card-ghic/).

9.4.3 Schools should check the cards of their pupils/staff and ensure they are in date. See 15. Transport

Refer to: ‘[Transport general considerations](https://www.google.com/url?q=http://oeapng.info/download/1162/&sa=U&ei=lgZ6UpbsBqib0QXPxoGYDg&ved=0CAgQFjAB&client=internal-uds-cse&usg=AFQjCNHYl--6DmybAWKMByqVlsoFSlgjnQ)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

Refer to: ‘[Insurance](https://www.google.com/url?q=http://oeapng.info/download/1150/&sa=U&ei=qAV6UsHjAurR0QW67oCoCA&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNFSpHEGL600vXD42g8yeBrogEusAw)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

## 10. Transport

10.1 Refer to: ‘[Transport general considerations](https://www.google.com/url?q=http://oeapng.info/download/1162/&sa=U&ei=lgZ6UpbsBqib0QXPxoGYDg&ved=0CAgQFjAB&client=internal-uds-cse&usg=AFQjCNHYl--6DmybAWKMByqVlsoFSlgjnQ)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

### 10.2 Private Cars

10.2.1 Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Head of Establishment, and a [PRIVATE CAR](#PrivateCarForm) see page 34 Form must be completed and retained by the establishment on an annual basis.

10.2.2 Refer to: ‘[Transport in private cars](https://www.google.com/url?q=http://oeapng.info/download/1168/&sa=U&ei=6AZ6Uon8N4HJ0AW_yYGIBg&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNEPntQHf1gHoQzhU0skVgQ81oyc1w)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

10.2.3 Refer to: ‘[FAQ6 Use of private cars](https://www.google.com/url?q=http://oeapng.info/download/1192/&sa=U&ei=6AZ6Uon8N4HJ0AW_yYGIBg&ved=0CAoQFjAD&client=internal-uds-cse&usg=AFQjCNEpAzuJk_FeSScMH6Bp5OZLhBvrOg)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

### 10.3 Coaches

10.3.1 The LA does not ‘approve’ coach companies. Whilst UK legislation ensures that coach companies are fit for public use, the facilities available on coaches may vary. Liaising with other establishments within the LA that have used a particular company (via a search on EVOLVE) will help to determine the level of service that may be provided.

### 10.4 Minibuses

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

10.4.2 Refer to: ‘[Transport in minibuses](https://www.google.com/url?q=http://oeapng.info/download/1164/&sa=U&ei=6AZ6Uon8N4HJ0AW_yYGIBg&ved=0CAkQFjAC&client=internal-uds-cse&usg=AFQjCNGRgN2yUOUWKvkxuWyz4MFb9d5usw)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

### 10.5 Public Transport in London

10.5.1 For public transport within the Greater London area contact ‘Transport for London’, who offer free travel for establishment parties on London buses, Underground, Tram link, and Docklands Light Railway, to cultural destinations. See [Transport for London](http://tfl.gov.uk/tickets/14311.aspx) Tel. 020 7918 3954.

## 11. Farm Visits

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

11.2 Refer to EVOLVE National Library: ‘[Preventing or controlling ill health from animal contact at visitor attractions - Advice to Teachers](http://national-library.info/download.asp?fileid=1562)’ and associated documents.

11.3 Refer to: Farming & Countryside Education: [Farming & Countryside Education](http://www.face-online.org.uk/) ‘[Farm Visits](https://www.google.com/url?q=http://oeapng.info/download/1214/&sa=U&ei=hgh6Uub-KYLM0QXdnoAo&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNFQNN25vo5gfDM85a3_m7UsWHc0GQ)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

## 12 Water Margin Activities

12.1 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.

12.1.1 \* ‘gentle’ means hardly moving at all.

12.1.2 \* ‘shallow’ typically means up to the knees of the participants.

12.2 Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions. At the outset the leader must decide whether the activity:

12.2.1 Falls within the definition in bold above - in which case the below guidance applies,

or

12.2.2 Exceeds the definition in bold above - in which case this is a water-based adventurous activity.

12.3 All staff involved in water-margin activities should be conversant with the guidance contained within [Group Safety at Water Margins](http://www.national-library.info/download.asp?fileid=423) This document must be made available to all supervising adults in advance of the visit.

12.4 As with all visits, where appropriate there should be an approved alternative ‘Plan B’ that could be used where conditions dictate, and for which parental consent has been obtained if necessary.

12.5 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.

12.6 Refer to ‘[Natural Water Bathing](https://www.google.com/url?q=http://oeapng.info/download/1224/&sa=U&ei=sgh6UsO_G6Tt0gXg2oCQCw&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNEEqqPTNvDpX5WRv5RiqHvehWJHjg)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

## 13 Residential Visits

13.1 Refer to: ‘[Residential Visits](https://www.google.com/url?q=http://oeapng.info/download/1180/&sa=U&ei=4Qh6UrHYE-mX1AW6wYCgAQ&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNGylH6Zf28Qn2eHVjnUy1lDHt4Qhg)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

## 14. Overseas Visits

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

14.1.1 Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.

14.1.2 Accommodation: checked for suitability, security, safety precautions and emergency evacuation.

14.1.3 Transport systems have been assessed as safe for use.

14.2 The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: [Foreign & Commonwealth Office - GOV.UK (www.gov.uk)](https://www.gov.uk/government/organisations/foreign-commonwealth-office) (from the home page select ‘Travel Advice’). All relevant FCO information should be circulated amongst the staff team.

14.3 Due to Brexit EHIC (European Health Insurance Card) are only valid until their expiry date. After this date you can no longer use them. However, individuals can apply for, the GHIC (Global Health Insurance Card). The government plans that the GHIC will slowly replace the EHIC card.See [Applying for healthcare cover abroad (GHIC and EHIC)](https://www.nhs.uk/using-the-nhs/healthcare-abroad/apply-for-a-free-uk-global-health-insurance-card-ghic/). Schools should check the cards of their pupils/staff and ensure they are in date. For any questions involving visas refer to British Council List of Travelers Scheme; [[School and teacher resources | British Council](https://www.britishcouncil.org/school-resources)](%20https:/schoolsonline.britishcouncil.org/partner-school/list-travellers-visa-scheme).

14.4 For exchange visits:

14.4.1 The LA has adopted the Outdoor Education Advisers’ Panel guidance document: [Young People’s Exchange Visits](http://www.national-library.info/download.asp?fileid=695) LA establishments are required to adhere to all relevant aspects of this guidance.

14.4.2 Refer to the British Council (Learning) [British Council | The UK’s international culture and education organisation](https://www.britishcouncil.org/).

14.5 For Overseas Expeditions Refer to: ‘[Overseas Visits](https://www.google.com/url?q=http://oeapng.info/download/1228/&sa=U&ei=FQl6Ur-tFseb0wWbnIHoDg&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNGkh-hAoKbCxR98nifXiKtOOONUQg)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

## 15. Weather, Clothing & Survival

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

15.1.1 The time of year, prevailing weather conditions, altitude and exposure to elements;

15.1.2 Likely changes in weather;

15.1.3 The experience and strength of the party;

15.1.4 The nature of the visit and environment.

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

15.2.1 Comfort, insulation and shelter for a casualty;

15.2.2 Comfort, insulation and shelter for the whole group;

15.2.3 Provision of emergency food and drink;

15.2.4 Torch;

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

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

## Swimming

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

16.2 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.

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

### 16.3.1 Swimming pools (lifeguarded)

LA Approval is not required

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

Refer to: ‘[Swimming in a Swimming Pool](https://www.google.com/url?q=http://oeapng.info/download/1234/&sa=U&ei=Tgl6Up-bMejA0QWG3YHoDw&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNFPaitXctAzgBEIi1EHXHiTV3Wp4A)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

### 16.3.2 Hotel (and other) swimming pools

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:

### 16.3.3 For free swimming activity

* A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see [The Royal Life Saving Society UK (RLSS UK)](https://www.rlss.org.uk/)

### 16.3.4 For structured or programmed activity

* A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see [The Royal Life Saving Society UK (RLSS UK)](https://www.rlss.org.uk/) **or**
* A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. - see [The Royal Life Saving Society UK (RLSS UK)](https://www.rlss.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 (e.g., no diving, running, etc.).
* To communicate effectively with pool users.
* To anticipate problems and prevent accidents.
* To intervene to prevent behaviour which is unsafe.
* To carry out a rescue from the water.
* To give immediate first aid to any casualty.

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

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

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

Refer to: ‘[Swimming in a Swimming Pool](https://www.google.com/url?q=http://oeapng.info/download/1234/&sa=U&ei=Tgl6Up-bMejA0QWG3YHoDw&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNFPaitXctAzgBEIi1EHXHiTV3Wp4A)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

### 16.3.5 Open water swimming (i.e., not in a swimming pool and not a ‘water-margin’ activity)

LA Approval is required via EVOLVE.

Particular consideration should be given to the following factors:

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

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

### 16.3.5 For free swimming activity

* A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see [The Royal Life Saving Society UK (RLSS UK)](https://www.rlss.org.uk/) Note: this is for beach/sea only, not inland water. **or**

### 16.3.6 For structured or programmed activity

* A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see [The Royal Life Saving Society UK (RLSS UK)](https://www.rlss.org.uk/) **or**
* A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. (available from 2013) see [The Royal Life Saving Society UK (RLSS UK)](https://www.rlss.org.uk/).

Refer to ‘[Natural Water Bathing](https://www.google.com/url?q=http://oeapng.info/download/1224/&sa=U&ei=sgh6UsO_G6Tt0gXg2oCQCw&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNEEqqPTNvDpX5WRv5RiqHvehWJHjg)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

## 17. Definition of an ‘Adventurous activity

17.1 The following activities are regarded as ‘adventurous’ and require LA approval:

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

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

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

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

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

17.5 Please note that all London activities also require LA approval.

## 18. Adventurous Activities

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

* Water-based activities
* Open country activities
* Snowsports
* Overseas expeditions.

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

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

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

a) **An external provider**

The provider must hold an [LOtC Quality Badge](http://www.lotcqualitybadge.org.uk/home) or complete a [Provider Form](#ProviderForm)

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

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

**or**

b) **A member of your establishment’s staff** -

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

## 19 Water-Based Activities

For clarification between water-margin and water-based activities.

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

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

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

* Swimming in publicly lifeguarded pools
* Water-margin activities
* Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

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

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

### a) An external provider

The provider must hold an [LOtC Quality Badge](http://www.lotcqualitybadge.org.uk/home) or complete a [Provider Form](#ProviderForm).

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

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

**or**

### b) A member of your establishment’s staff

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

19.6 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, control measures in place 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.

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

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

a) takes place in a swimming pool, or

b) is ‘swimming’, or

c) is an activity for which personal buoyancy would not normally be worn by young people.

## Open-country activities (Adventurous)

20.1 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.

20.2 Open-country activities are regarded as ‘adventurous’ and therefore these visits require LA approval.

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

### a) An external provider

The provider must hold an [LOtC Quality Badge](http://www.lotcqualitybadge.org.uk/home) or complete a [Provider Form](#ProviderForm).

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

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

**or**

### b) A member of your establishment’s staff

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

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

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

b) For leaders of walking groups in mountainous terrain within the UK and Ireland

* Mountain Leader Award (Summer or Winter as appropriate) Mountain Training (mountain-training.org) **or**
* A written statement of competence by an appropriate technical adviser.

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 [Mountain Training (mountain-training.org)](https://www.mountain-training.org/) or
* A written statement of competence by an appropriate technical adviser.

d) For leaders of walking groups in terrain ‘easier’ than that defined in c).

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

* Countryside Leader Award. See [Home | CLA (countrysideleaderaward.org)](http://www.countrysideleaderaward.org/)
* Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL).
* See [Sports Leaders UK Level 3 Certificate in Basic Expedition Leadership (BEL) (altadv.co.uk)](https://www.altadv.co.uk/index.php/qualifications/sports-leaders-uk-level-3-certificate-in-basic-expedition-leadership-bel)
* Completion of a suitable ‘Leader Training’ Course.
* A written statement of competence by an appropriate technical adviser.
* Evidence of recent, relevant experience, appropriately corroborated.
* An assessment of competence (written or implied) by the Head of Establishment.

## 21. Snow Sports (Adventurous)

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

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

21.3 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 [Home Page - Snowsport England](https://www.snowsportengland.org.uk/) and must have previously accompanied at least one educational snowsports visit.

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

21.5 A member of staff intending to lead skiing or snowboarding (i.e., not using a ski school instructor) must be qualified as below and have been approved by the LA via EVOLVE

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

* The Alpine Ski Course Leader Award (ASCL) [Snow Sport England](http://www.snowsportengland.org.uk/) or
* The Alpine Ski Leader Award (ASL) [Home Page - Snowsport England](https://www.snowsportengland.org.uk/) or
* A statement of competence by an appropriate ‘technical adviser’.

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

* The Snowboard Leader Award (SBL) administered [Snowsport Scotland](https://www.snowsportscotland.org/) or
* A statement of competence by an appropriate ‘technical adviser’.

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

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

a) under the direction of a suitably qualified local instructor, AND

b) they will remain within the designated controlled areas, AND

c) off-piste activities are specifically included within the visit insurance policy, AND

d) a NOTE is added to EVOLVE in advance of the visit, confirming that the above criteria are/will be complied with.

21.8 Important: the establishment must check the liability position prior to making a commitment.

21.9 Refer to ‘[Snowsport visits](https://www.google.com/url?q=http://oeapng.info/download/1232/&sa=U&ei=0gl6UqLJFoPP0QWo14GYDg&ved=0CAgQFjAA&client=internal-uds-cse&usg=AFQjCNFzpt0NHBS5Zom9Gd8nblQsptx-0w)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

## 22. Overseas Expeditions

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

22.2 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.

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

a) Holds an LOtC Quality Badge [LOtC Quality Badge - Council for Learning Outside the Classroom](https://www.lotc.org.uk/providers/lotc-quality-badge-2/) **or**

b) Provides a statement of compliance with Guidance for Overseas Expedition Edition 4 (2014) [Guidance for Overseas Expedition Edition 4](http://www.national-library.info/download.asp?fileid=1585).

22.4 For providers that do not hold an LOtC Quality Badge, ‘Guidance for Overseas Expeditions, Edition 3’ should be referred to when the proposal is initiated. This document contains information for both establishments and providers and includes a checklist of vital aspects that must be considered prior to the establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

22.5 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.

22.6 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 [Royal Geographical Society - Royal Geographical Society (with IBG) (rgs.org)](https://www.rgs.org/).

22.7 Refer to: ‘[Overseas Expeditions](https://www.google.com/url?q=http://oeapng.info/download/1226/&sa=U&ei=Ogp6UvsogcbiBJCtgOAJ&ved=0CAcQFjAA&client=internal-uds-cse&usg=AFQjCNFUrOnTnawc-zftkyVs5LXohrJPrA)’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/).

## 23. Emergency Procedures

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

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

23.3 For visits that take place outside normal establishment hours:

23.3.1 A completed Emergency Card – Visit Leader (or equivalent) must be with the Visit Leader at all times, and

23.3.2 A completed Emergency Card – Home Contacts (to be held by the school refer to pg. 37-40) or equivalent) must be with the emergency home contact(s) at all times, where access to EVOLVE is not possible.

23.4 In an emergency, if it is not possible to reach any of the designated establishment emergency contacts, the leader should call the LA 24-hour emergency number - see Contacts.

23.5 For visits that take place outside normal establishment hours:

23.5.1 A completed Emergency Card – Visit Leader (or equivalent) must be with the Visit Leader at all times, and

23.5.2 A completed Emergency Card – Home Contacts (or equivalent) must be with the emergency home contact(s) at all times, where access to EVOLVE is not possible. (To minimise the risk of a data breach, please store hard copies in a double sealed (2 envelopes one within the other) stamped addressed envelope marked addressee only, with the home contacts name and address on). The Evolve Go App can be downloaded on smartphones and tablets.

23.6 In an emergency, if it is not possible to reach any of the designated establishment emergency contacts, the leader should call the LA 24 hour emergency number - see Contacts.

23.7 There should be a clear audit trail of responsibilities, with agreed processes to put in place an appointed Lead Manager (LM) to take charge of any given incident on a 24/7 basis. They will need to have effective access to a support group that is seconded from within a group of designated staff that have been delegated the responsibility to coordinate the employer’s central response, supported by other departments and/or agencies under Slough Borough Council’s Accident/Incident Policy “which can be accessed through the following links;

23.8 Refer to: ‘Critical incident management’ in National Guidance [OEAP National Guidance](http://www.oeapng.info/)

23.9 Refer to: ‘Emergency planning establishment’ in National Guidance [OEAP National Guidance.](http://www.oeapng.info/)

23.10 Refer to: ‘Emergency procedures for visit leaders’ in National Guidance [OEAP National Guidance.](http://www.oeapng.info/)

23.11 Refer to: FAQs – Visits and threat of terrorism Contents | (oeapng.info).

## 24. Approval of staff to lead an adventurous activity

### 24.1 Procedure for obtaining approval

24.1.1 Staff who wish to lead (i.e., supervise or instruct) an adventurous activity, must first upload details and scanned copies of all relevant qualifications (e.g., instructor certificates, first aid, etc) to the ‘My Details’ section of their EVOLVE account.

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

24.1.3 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.

24.1.4 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.

### 24.2 Criteria for approval

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

a) is appropriately qualified through the relevant National Governing Body, or

b) has a ‘Statement of Competence’ from an appropriate ‘technical adviser’ – see below.

24.2.2 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.

24.2.3 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.

24.2.4 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.

24.2.5 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.

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

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

### 24.3 **Using an External Provider**

24.3.1 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.

24.3.2 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
* staff with an approved Activity Leader Form (ALF)
* 'Volunteer' instructor of adventurous activities (see below).

24.3.3 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.

24.3.4 Establishments should consider the requirements under ‘best value’ when selecting an external provider.

24.3.5 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 [LOtC Quality Badge - Council for Learning Outside the Classroom](https://www.lotc.org.uk/providers/lotc-quality-badge-2/) or [Kaddi - Places to go and things to do!](http://www.kaddi.com/)

**or**

b) A ‘Provider Form has been satisfactorily completed by the provider.

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

24.3.6 Note: from 2014, EVOLVE will automatically identify providers that hold an LOtC Quality Badge, via the search tool Kaddi [Kaddi - Places to go and things to do!](http://www.kaddi.com/)

24.3.7 For Providers that hold an LOtC Quality Badge [LOtC Quality Badge - Council for Learning Outside the Classroom](https://www.lotc.org.uk/providers/lotc-quality-badge-2/) or [Kaddi - Places to go and things to do!](http://www.kaddi.com/)

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

24.3.9 For Providers that do not hold an LOtC Quality Badge [LOtC Quality Badge - Council for Learning Outside the Classroom](https://www.lotc.org.uk/providers/lotc-quality-badge-2/) or [Kaddi - Places to go and things to do!](http://www.kaddi.com/)

## 25. PROCEDURE

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

25.1.1 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.

25.1.2 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.

25.1.3 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.

25.1.4 In some instances, for example where an establishment intends to use an ‘external’, voluntary individual for services, then this person may be regarded as a temporary member of staff and the procedure outlined in Approval of staff to lead an adventurous activity may be appropriate.

25.1.5 The above procedure is not sufficient for Overseas Expeditions (i.e., those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and must be complied.