



# **Guidance for Educational Visits**

## **FEB 2026**

Document for:

Educational Visits Coordinators

Teachers

Headteachers

## Edsential Guidance for Educational Visits and Offsite Activity

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## 1. General

**The purpose of this document is to link the requirements of Edsential with National Guidance.**

Edsential acknowledges the immense value of outdoor learning and off-site visits and related activities to young people and fully supports and encourages those that are well planned and managed.

**Edsential adopts the Outdoor Education Advisers' Panel National Guidance which can be found at [www.oeapng.info](http://www.oeapng.info)**

This document is to support schools in meeting the requirements set out by the Department of Education [Health and safety on educational visits - GOV.UK](https://www.gov.uk/guidance/health-and-safety-on-educational-visits)

This document hyperlinks to the main National Guidance site. Hyperlinks are used throughout this document however as this guidance is updated regularly it is not possible to hyperlink to specific sections.

Edsential uses the web-based platform 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits. All staff that lead or accompany visits can access their own EVOLVE account which is set up by their Establishment's Educational Visits Coordinator (EVC). Other systems are available that schools may choose to work with and Edsential can support. For schools that choose alternative recording systems any references in this document to EVOLVE should refer to that system.

As well as being an efficient tool for planning and approving visits EVOLVE also contains a variety of features including search and report facilities, downloadable resources, a link to the National Library, staff records, visit history and gateway access for parents. Additional features are available for an extra cost including Evolve+ which allows integration with the school management system.

**EVOLVE:** <https://evolve.edufocus.co.uk/evco10/unknown.asp>

## 2. Role of the Educational Visits Coordinator

To help fulfil health and safety obligations for visits, the DfE recommends that an Educational Visits Coordinator (EVC) should be appointed who will support the Head of Establishment. In small Establishments the EVC may also be the Headteacher or Manager. Should the Establishment choose not to appoint an EVC those functions will automatically fall to the Head of Establishment.

The EVC should be specifically competent, with practical experience, in leading and managing a range of visits like those typically run by the Establishment. Commonly, but not exclusively, such competence will be identified in a person on the senior management of the Establishment. Further details can be found at the following link [Guidance by Role |](#)

The EVC must attend initial EVC training\* if a maintained school or purchasing into Edsential SLA (\*Trafford Recommended). Subsequent update training is available as a refresher and should be attended every three years. Training can be provided by Edsential.[Learning Outside the Classroom - Edsential](#)

The EVC should support the Head of Establishment in ensuring that competent and confident staff are assigned to lead and accompany visits with approval and other decisions, please refer to Section 10 for more information on competency.

The EVC should ensure that a policy is in place for educational and off-site visits and that this is updated, as necessary. This should be readily available to staff via their Establishment's own EVOLVE Resources section.

Establishments are advised to consider the merits of adapting the sample 'Educational Visits Checklist' National Guidance 3.3e (Word version in EVOLVE Resources) to suit their own circumstances and uploading this to their Establishment's own EVOLVE Resources section.

EVCs should make themselves familiar with OEAP (Outdoor Education Advisors Panel) National Guidance website refer to relevant section/s of [National Guidance](#) by using the search facility.

**It is imperative that EVCs ensure all documentation and risk assessments are uploaded and reviewed on EVOLVE before submission.**

Please see the Appendix 3 – The Educational visits flowchart

### 3. Approval of visits

In approving visits, the Head of Establishment and EVC should ensure that Visit Leaders have been appropriately inducted/trained and is competent to lead the visit. Refer to Section 10.

**Local Area Visits:** Where there are **local activities** that are a planned part of the curriculum but are dependent upon the right conditions on the day then the Visit Leader should record the event on EVOLVE. Such activities must be addressed in the school policy with a generic risk management plan in place. **These involve no more than an everyday level of risk and are covered by a school's current policies and procedures. They only need a little extra planning beyond the educational aspect of the trip. They can be considered as lessons in a different classroom.**

Visits/activities within the 'Local Learning Area' that are part of the normal curriculum and take place during the normal school day follow the Operating Procedure below.

These visits/activities:

- should be recorded on EVOLVE via the 'Local Area Visit' module.
- do not require parental consent. Your annual consent should cover these visits.
- do not normally need additional risk assessments.

**All other visits:** It is recommended that all other visits are entered onto EVOLVE to support Establishments with the planning, processing, and monitoring visits.

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

The following visit types are authorised within the Establishment and then checked and reviewed by Edsential via EVOLVE: ☐

A - Overseas

B - Residential

C - Involving an adventurous activity as defined in Section 21

Visits which are not in the visit categories highlighted A, B or C are reviewed at establishment level only via the EVC and Head Teacher.

## 4. Outcomes

Clarity regarding the intended outcomes and benefits of the visit will help to ensure that the potential benefits can be achieved. These outcomes can be used for subsequent evaluation.

Educational activity that takes place outside the classroom can provide a powerful means of developing learning in all curriculum areas and raise attainment.

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

Refer to relevant section/s of [National Guidance](#) by using the search facility.

## 5. Inclusion

The Equality Act 2010 defines several protected characteristics: disability; gender reassignment; pregnancy and maternity; race; religion or belief; sex; and sexual orientation. It is illegal to discriminate against someone because of these characteristics, and employers or establishments must make reasonable adjustments to their facilities or services to ensure inclusion.

Educational visits should be available and accessible to all, regardless of any special educational or medical needs or protected characteristics. The principles of inclusion and equality should be embedded in policy and practice, ensuring:

- entitlement to participate
- accessibility through adaptation or modification, including the provision of auxiliary aids and services
- integration through participation with peers

When planning a visit or activity for a group—such as a school year group or youth group—you must take reasonably practicable measures to include every member. This includes making reasonable efforts to select venues and activities that are suitable and accessible, and arranging provision that enables the whole group to participate fully and benefit from the experience. Care should be taken to avoid indirect discrimination.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

## 6. Responsibilities

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

- For Community, Community Special, Voluntary Controlled, Maintained Nursery schools, Pupil Referral Units and Statutory Youth Groups who are part of the Children and Young People’s Department the employer is the Local Authority.

For Trafford, Wirral and Cheshire West and Cheshire Local Authorities Edsential has been contracted to provide this service. Maintained schools in these local authorities must operate within Edsential’s Educational Visits Policy.

- For Voluntary Aided, Foundation, Academy, Independent and Free schools, the employer is usually the governing body or proprietor. As part of the service level agreement we firmly advise that you adhere to Edsentials Education Visits Policy Advice and Guidance.

All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place. The visit leader is responsible for allocating these responsibilities.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

## 7. Planning

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

The extent of planning required is related to the complexity of the visit. Please refer to:

*Appendix 3 The Educational visits flowchart.*

*Appendix 4 STAGER model:* 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](#)

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 and employer policy. 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.

Owing to the complex nature of residential and off-site visits often comprehensive planning and management needs to be considered. This can be achieved effectively through a combination of the EVOLVE Visit Form itself and any appended notes and/or attachments.

Visit planning includes consideration of the question: *'What are the really important things that we need to do to keep us safe?'* Visit planning should focus on those issues that are individual to the specific event, considering the needs of the group (including special and medical needs), the experience and competency of the leader and team of staff in the context of the event. Significant issues must be recorded on EVOLVE and shared with all parties.

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

Planning that includes adventurous activity commonly involves delivery by an external provider (see Section 29) and the provider will have responsibility for managing the activity.

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

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

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

Refer to relevant section/s of [National Guidance](#) by using the search facility.

## **8. 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 re-emphasised as appropriate during the visit.

Monitoring of the visit must be ongoing. This contributes towards both enjoyment and safety.

It is primarily the responsibility of the visit leaders to modify or curtail the visit or activity (e.g., Plan B) to suit changed or changing circumstances. For example, an over-busy lunch area, behaviour, rain, and rising water levels or unhappy with a provider or activity.

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

Refer to relevant section/s of [National Guidance](#) by using the search facility.

## 9. Parent / Guardian Consent

### In relation to schools:

Written consent from parents is not required for pupils to take part in most day-to-day off-site activities organised by a school (except for EYFS) as most of these activities take place during school hours and are a normal part of a child's education at school.

Written consent is usually only requested for activities that need a higher level of risk management or those that take place outside school hours.

### Informed Consent

Establishments must ensure that parents/guardians are clear about (a) how their consent will be sought when it is required and (b) how they will be given information on visits. Consent should be specific, informed, unambiguous and given freely with an affirmative action such as a tick or signature.

### For a Parent/Guardian Routine Visits Consent Form

Schools can ask legal guardian to sign when a child enrolls at the school and reviews at the commencement of every academic year. This will cover a child's participation in any of these types of routine activities (low risk local area visits including off site sports fixtures) throughout their time at the school.

### For Parent/Guardian for all other type of visits

The establishment must seek appropriate and informed consent from parents/guardians. These include adventurous activities, residential visits (including during school holidays or at the weekend) and all off-site activities **for nursery schools which take place at any time.**

Parent/guardians must be informed in advance of each activity and must be given the opportunity to withdraw their child from any school visit or activity covered by the form. The school must have a robust means of ensuring that changes to parent / guardian contact details and child medical details are up to date.

## 10. Competence to Lead

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

- What experience the leader has in leading or accompanying similar visits (Check visit history on EVOLVE).
- The competence of the leaders in planning and managing visits
- The leader's reasons for undertaking the visit
- Can the leaders manage the pastoral welfare of participants
- Do the leaders exhibit sound decision making abilities
- What experience the leader has of the participants he/she/they intend to supervise
- What experience does the leader has of the environment and geographical area chosen
- Do the leaders possess appropriate qualifications
- If appropriate, what is the leader's personal level of skill in the activity and fitness level
- If leading adventurous activities have the leaders been 'approved' by the establishment as being confident and competent
- Are the leaders aware of all relevant guidelines and are they able to act on these

Refer to diagram: Educational Visits flowchart appendix 3

Refer to relevant section/s of [National Guidance](#) by using the search facility.

## 11. Staffing, Supervision, and Ratios - STAGER MODEL

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.

Ratios for Early Years are specified and must be adhered to.

For all other visits the visit leader, EVC and Head of Establishment must make a professional judgment 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 of Establishments 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.

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.

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 a DBS check as part of their recruitment process. For the purpose of this guidance: Keeping Children Safe in Education 2025: [Keeping children safe in education - GOV.UK](#)

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

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

Refer to relevant section/s of [National Guidance](#) by using the search facility.

**Please see appendix 4 STAGER model.**

### **Ratios and Effective Supervision**

Ratios are a risk management issue and should be determined through the process of risk assessment. It is not possible to set down definitive staff/student ratios for a particular age group or activity, although the law does specify minimum ratios for Early Years.

Some guidance documents do set out ratios, but these should be regarded as starting points for consideration rather than being definitive, as they may only be appropriate where the activity is straightforward, and the group has no special requirements. For example, the DfES publication HASPEV (1998) suggested the following starting points. [Health and safety on educational visits - GOV.UK](#)

- School years 1-3, 1:6
- School years 4-6, 1:10/15
- School years 7 onwards, 1:15/20
- For visits abroad 1 adult to 10 pupils

Without special safeguards or control measures, these ratios will **not** be adequate to meet the needs of most residential or more complex visits.

The Early Years and Foundation Stage Statutory Framework [Early years foundation stage \(EYFS\) statutory framework - GOV.UK](#) sets out specific legal requirements for minimum ratios

in this age group, which apply both indoors and on outings. These are complex and include requirements about the qualifications of the staff.

For EYFS informed consent must be sought for all off site visits.

### **Remote Supervision**

Young people must be supervised throughout all visits. Where they are unaccompanied by a member of staff or another responsible adult, e.g., D of E expeditions, 'down time' in a shopping centre, etc. This downtime is known as 'remote supervision.'

Remotely supervised activities can bring purposeful educational benefits. 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, social skills, and decision making.

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 judgment considering such factors as:

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

When recording a remotely supervised visit on EVOLVE there must still be a named visit leader. This will be the member of staff that has made a professional judgment regarding the level of responsibility and maturity of the participants and where that member of staff has decided that it is reasonable for them to be undertaking the specific activity unaccompanied by an adult.

Refer to relevant section/s of [National Guidance](#) (remote supervision) by using the search facility.

## **12. First Aid**

**For all visits there should be a confident and competent nominated first aider with a good working knowledge of first aid appropriate to the environment (e.g., urban, remote, water, etc). This can be evidenced through obtaining a relevant first aid qualification.**

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

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

Refer to relevant section/s of [National Guidance](#) by using the search facility.

EYFS – it is a legal requirement when working with EYFS pupils that a member of staff hold a paediatric first aid certificate.

### **13. Insurance**

Advice regarding insurance may be sought from your establishment insurer.

For visits abroad, additional travel insurance (sometimes referred to as school journey insurance) **must** be obtained by the school/establishment if not already included.

For all other visits it is the responsibility of the Establishment to determine whether additional insurance should be taken out. The team should particularly consider the need for additional insurance for residential activities or those involving adventurous activities or hazardous environments.

Public Liability Insurance recommendations for maintained schools are as follows

Trafford £5 Million

Cheshire East £10 Million

Cheshire West £10 Million

Halton £10 Million

Wirral £10 Million

Where non maintained schools use providers/venues with a lower level insurance than that above, by submitting the form the Head Teacher has agreed with the level that the provider holds.

The responsibility for arranging adequate insurance cover rests with the Head Teacher/Senior Manager in conjunction with the Visit Leader.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland). All participants must hold a valid GHIC (European Health Insurance Card). See [Applying for healthcare cover abroad \(GHIC and EHIC\) - NHS](#)

Refer to: section of [National Guidance](#) by using the search facility.

**If trips require EMPLOYER approval this must be done via EVOLVE prior to the trip taking place. Failure to doing so may be considered a negligent act for the purposes of insurance and make any claim harder to defend.**

## **14. Transport**

The establishment Risk Assessment for Transport should be kept up to date and reviewed on a regular basis.

### **PRIVATE CARS**

Where a private (staff/parent) car is to be used to transport young people then this must be approved by the Head of Establishment. You must follow your Employers' policy, an example of a Form can be found in appendix 1.

### **COACHES**

Edsential does not approve coach companies. Whilst UK legislation ensures that coach companies are fit for public use the facilities available on coaches may vary.

### **MINIBUSES**

Establishments that own or hire a minibus must have an operational policy in place for this. If a maintained school or Youth service, please check your Local Authority details about minibuses and educational visits.

Refer to relevant section of EVOLVE by using the search facility. [Transport Guidance](#)

## **15. Farm Visits**

It is recommended that only LOTC (Learning Outside the Classroom) Quality Badge approved farms are used for educational visits.

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

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

Refer to relevant section by using the search facility. [Farm Visits](#)

## 16. Water-Margin Activities

This section applies to:

**Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds, canals 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 commercial watercraft.**

\* 'gentle' means hardly moving at all.

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

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

At the outset, the leader must decide whether the activity:

- a) Falls **within** the definition in bold above - in which case the guidance below applies.
- b) **Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and [Section 23](#) applies.

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

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

Edsential approval is required for water-margin activities where the students intend to enter the water. The leader must have previous relevant experience and must have been assessed as competent to lead the activity by the EVC and/or Head of Establishment.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

## 17. Residential visits

**It is strongly recommended that schools use providers with an LOTC Quality Badge, the LOTC Quality badge is a quality assurance scheme, ensuring that appropriate checks have been carried out in relation to risk management. It is recognised by the DfE and is an effective route to ensure that due diligence has been undertaken on the provider.**

For [Licensable activities](#) is a legal requirement for providers to hold an AALA (Adventure Activity Licensing Authority) Licence.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

## 18. Overseas visits

Edsential 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. Edsential should be included in the early planning of any overseas visits where you are not using a LOTC quality badge provider. Visa and passport requirements must be checked in the planning stages against the pupils planned to attend. Please note, a **minimum of 30 working days (term time only)** is required for the approval of any overseas visits using a LOTC Quality badge provider.

**We strongly recommend that schools use LOTC Accredited providers for overseas trips.**

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

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

- a) Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol, and drugs.
- b) Accommodation: checked for suitability, security, safety precautions, and emergency evacuation.
- c) Transport systems have been assessed as safe for use.
- d) Guidance is sort from Foreign Commonwealth office regarding entry requirements. [Foreign travel advice - GOV.UK](#)

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

**For exchange visits:**

- Edsential has adopted the Outdoor Education Advisers' Panel national guidance document: [Young People's Exchange Visits](#). LA Establishments are required to adhere to all relevant aspects of this guidance. This document is on Evolve in the resources section.
- Refer to the British Council (Learning) [www.britishcouncil.org](http://www.britishcouncil.org)

## 19. Weather, clothing, and survival

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

Participants should be adequately clothed appropriate for:

- 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
- A torch
- A need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas)

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

## 20. Swimming

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

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

All swimming activities and venues must be included within the visit plan and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad where for example a hotel pool may be available. Please seek advice from Edsential. Please note particular risk management must be carried out by school if a visit of this type is being planned.

**Young people must be always supervised by a competent adult whilst undertaking ANY swimming activities as well as having an appropriate lifeguard cover for the activity. The following criteria apply:**

**Swimming pools (lifeguarded)**

- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.
- For publicly lifeguarded pools abroad the Establishment’s staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
  - The Establishment’s staff should not have responsibility for lifeguarding, unless the Establishment have a member of staff who is suitably qualified. **However, they do always retain a pastoral role for participants through direct supervision.**
  - For swimming lessons, the Establishment should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines. Please see [Swim England Guidance a guide for swimming teachers.pdf](#)

### **Hotel (and other) swimming pools**

Approval to lead the activity will be required via EVOLVE.

Establishments must ensure they liaise with the Educational Visits Adviser before any visit is planned for hotel (and other) swimming pools.

Establishments should check the lifeguarding position in advance.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

### **For free swimming activity**

A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see [National Pool Lifeguard Qualification \(NPLQ\) | Lifeguard Course by RLSS UK](#)

### **For structured or programmed activity**

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see [National Rescue Award for Swimming Teachers and Coaches \(NRASTC\) | Royal Life Saving Society UK \( RLSS UK \)](#)

Normal Operating Procedures and the Emergency Plan for the pool should be considered before swimming takes place. Full familiarisation of the systems should be walked through at the pool.

Staff must be aware of the procedures in the event of an emergency and who will provide back up at the venue. 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.

**Open water swimming** (i.e., not in a swimming pool and not a 'water-margin' activity)

Essential Approval is required via EVOLVE.

Particular consideration should be given to the following factors:

- Unknown locations and hazards, especially overseas.
- Water quality
- 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 the location used must fall within the RNLI/RLSS definition of a 'safer bathing area'. Local advice must always be sought.

[Open Water Lifeguard \(OWL\) Qualification | RLSS UK](#)

### **Beach swimming activity**

- A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited. Note: this is for beach/sea only and not inland water.
  
- Tide times must be reviewed in planning stages

[National Vocational Beach Lifeguard Qualification \(NVBLQ\) | Provided by RLSS UK](#)

## 21. Definition of an 'adventurous activity'

Please contact Edsential if there is uncertainty over whether a particular activity requires approval. The following activities are regarded as adventurous and require employer approval:

All activities in open country (see below).

- Swimming (all forms, **except Primary & Secondary School curriculum Swimming Programme**).
- Water margin activities including pond/stream dipping [Group Safety at Water Margins](#)
- Rafting or improvised rafting
- Use of powered safety / rescue craft
- All other forms of boating (excluding commercial transport)
- All forms of water sports including improvised rafting
- Water skiing
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including climbing walls), Abseiling, Via ferata
- Mountain Biking
- Coasteering / coastal scrambling / sea level traversing
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- River / gorge walking or scrambling
- Camping
- Underground Exploration
- Air activities (excluding commercial flights).
- Horse riding.
- Motor sports- all forms
- Shooting and archery
- Theme Parks- where there is a range of water rides
- Off road cycling
- High level ropes courses AND Zip wires
- Trampoline Parks (LOTC QB only)
- Inflatable parks (LOTC QB only)
- Any activity where the provider requires a waiver or risk acknowledgement disclaimer form to be signed.
- Other activities (e.g., initiative exercises) involving skills inherent in any of the above.

**Currently Edsential do not approve the following Activities:**

- **Zorbing**
- **Paintballing**
- **Visits to the Crocky Trail, Manley Mere adventure trail or aqua parks**
- **Inflatable parks including water parks**
- **This is not a definitive list.**

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

**These are examples only:**

- Walking in parks or non-remote country paths
- Bowling
- Zoos
- Laser Quest
- Swimming – as part of the Primary & Secondary School Curriculum Swimming Programme
- Pedal go-karts
- Ice skating (rink)
- Local traffic survey
- Museum, library, etc
- Physical Education and sports fixtures (other than in the adventurous activities list)
- Football stadiums
- Theme Parks where there are no water rides

## **22. Adventurous Activities**

This section is applicable to all adventurous activities except the following four activities. Separate guidance applies for these four activities:

*Water-based activities - Section 23*

*Open country activities - Section 24*

*Snowsports - Section 25*

*Overseas expeditions - Section 26*

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

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

a)  An external provider - see Section 29

Edsential strongly recommends that schools use providers who hold an LOtC Quality Badge. LOtC QB holders can be found on the LOtC website - [Find a LOtC Quality Badge Holder - Council for Learning Outside the Classroom](#).

Alternatively, a Provider Form may be completed on Evolve for consideration.

Where activities are licensable, an AALA licence should **also** be held. AALA licence holders can be found on the HSE website - [Adventure Activities Licensing Scheme \(AALS\) - Looking for a provider? \(hse.gov.uk\)](https://www.hse.gov.uk/adventure-activities-licensing-scheme-aals-looking-for-a-provider/)

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

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

or

b) *A member of your Establishment's staff - see Section 28* This person must be specifically approved by your establishment to lead the activity. Competency to deliver the activity must be evidenced on EVOLVE and approved by the head of the establishment.

## 23. Water-Based Activities

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 documented 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 and other site users.

Personal buoyancy conforming to the appropriate National Governing Body guidelines must always be worn 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 as directed by the NGB

## 24. Open-Country Activity

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

For the purposes of Edsential and Employer 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 Edsentials' LOtC, Evolve and Educational Visits Team if you think this might apply.

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

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

The provider must hold a LOtC Quality Badge or complete a Provider Form

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

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

*or*

b) **A member of your Establishment's staff** - see below

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

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

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

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

- Mountain Leader Award (Summer or Winter as appropriate) [www.mltuk.org](http://www.mltuk.org) *or*

- A written statement of competence by an appropriate technical adviser - see [Section 28](#)

c) **For leaders of walking groups in summer conditions in non-mountainous hilly terrain**

(Known variously as upland, moor, bog, hill, fell or down), with well-defined obvious boundaries such as roads and coastlines. Where any hazards within it are identifiable and avoidable and where wild camping or movement on steep ground is not involved.

- Hill and Moorland Leader Award [www.mltuk.org](http://www.mltuk.org) *or*

- A written statement of competence by an appropriate technical adviser - see [Section 28](#)

d) **For leaders of walking groups in terrain 'easier' than that defined in c)**

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

– Countryside Leader Award. See [www.countrysideleaderaward.org](http://www.countrysideleaderaward.org)

– Lowland Leader or Walking Group Leader Award See [-Qualification](#)

– Completion of a suitable 'Leader Training' Course.

– A written statement of competence by an appropriate technical adviser see [Section 28](#)

– Evidence of recent and relevant experience which has been appropriately corroborated.

– An assessment of competence (written or implied) by the Head of Establishment

## 25. Snowsports

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

A member of staff intending to organise a Snowsport visit (but not instruct, lead, or supervise on snow) should hold the Snowsport Course Organiser Award (SCO), administered by Snowsport England [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) and must have previously accompanied at least one educational Snowsports visit. This course outlines the relevant qualifications needed to teach Snowsports within the visiting country.

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

A member of staff intending to lead skiing or snowboarding (i.e., not using a ski school instructor) must be qualified as below and follow the local requirements of the country.

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

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

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

- The Snowboard Leader Award (SBL) administered [www.snowsportsotland.org](http://www.snowsportsotland.org) *or*
- BASI Level 2 Snowboard Instructor [www.basi.org.uk](http://www.basi.org.uk) or equivalent

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

- a) The pupils are under the direction of a suitably qualified local instructor
- b) They remain within the designated controlled areas
- c) Insurance covers them to do so

## 26. Overseas Expeditions

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 12 months for Edsential approval to be granted. **For overseas expeditions you must contact your Educational Visits Advisor before contracts are signed with your provider.**

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

- a) Holds an LOTC Quality Badge [LOTC Quality Badge Check](#) *or*
- b) Completes a provider form and is evident in following National guidance for oversea expeditions

For guidance on overseas expedition please see the following link: [Overseas Expedition Guidance](#)

This should be referred to when the proposal is initiated. This document contains information for both Establishments and providers and includes a checklist (see [Checklist](#) ) of vital aspects that **must** be considered prior to the Establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

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

For further information and support please see:

[Resources for expeditions - RGS](#)

## **27. Emergency Procedures**

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

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

For visits that take place outside normal Establishment hours:

-Visit leader should take next of kin details for students and staff who are going on the visit.

In an emergency, if it is not possible to reach any of the designated Establishment emergency contacts, the leader should call their Employer or 24-hour emergency number. Please ensure these numbers are checked for accuracy.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

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

### PROCEDURE FOR OBTAINING APPROVAL

Staff who wish to lead (i.e., supervise or instruct) an adventurous activity, as defined in Section 21, must first upload details and copies of all relevant qualifications (e.g., 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 (e.g., dates, venues, numbers, etc), along with the leader's experience and qualifications. The ALF will then be embedded within the Visit Form for that visit.

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

By submitting the EVOLVE form the Head of the establishment is confirming the staff are competent and confident to lead the activity in line with National Guidance. Edsential will then view the visit form, if approval is not granted to lead the activity, the Visit Form will be returned to the EVC via EVOLVE, with an attached note identifying areas of concern. Where this is the case, the activity must not take place if it is a maintained school.

### CRITERIA FOR APPROVAL

Trips must be submitted to Edsential for review via EVOLVE a minimum of 20 working days prior to the trip commencing. Overseas trips must be submitted a minimum of 6 weeks prior to the trip commencing. Late submissions MAY be considered at the discretion of Edsential and subject to an administration fee.

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

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

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

In some cases, approval may be granted where no qualification is held, but the person concerned is deemed by the Employer to have a sufficient level of competence.

In cases where no qualification is in place, the Edsential LOtC Team will consider factors which may include technical advice, the leader's stated competence, observed competence, experience, and attendance at training courses. Edsential LOtC team will provide feedback based on the information provided only.

Approval will always be subject to a requirement that the leader must always act 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 Edsential LOTC Team on the EVOLVE Visit Form.

Where there is insufficient information for the Edsential LOTC Team 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 Edsential LOTC Team.

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

## 29. Guidelines for using an External Provider

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
- Freelance instructor of adventurous activities
- Youth Hostel only if activity instruction is provided
- Voluntary organisation (e.g., Scout Association), where instruction is provided
- Farms
- Trampoline Park
- 'Volunteer' instructor of adventurous activities

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

- Hotel, B&B, etc.
- Museums, galleries, etc.
- Theme Parks
- Youth Hostel (where accommodation only is used)
- Campsite
- Coach, Train, or Airline company
- Swimming Pool
- Leisure/Sport Centre

The decision about the use of an external provider is the responsibility of the visit leader, EVC, Headteacher and Head of Establishment.

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

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

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

*or*

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

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

**For Providers that hold an LOtC Quality Badge** [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

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 group.

**For Providers that do not hold an LOtC Quality Badge** [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

A provider form will need to be completed

**PROCEDURE:**

- When completing the EVOLVE form you will be provided with a link to an online Provider Form.
- Copy the link and send it to the provider to complete.
- Note on the EVOVLE form that the link has been sent to the provider.

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

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

In some instances, for example where a school/establishment intends to use an 'external,' **voluntary** individual or service, all due diligence must be carried out in the same way.

**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. Please contact the Edsential LOtC Team.

For Further assistance with LOtC and EVOLVE please contact

Edsential LOtC Team on 0151 541 2170 ext: 4 [Lotc@edsential.co.uk](mailto:Lotc@edsential.co.uk)

