

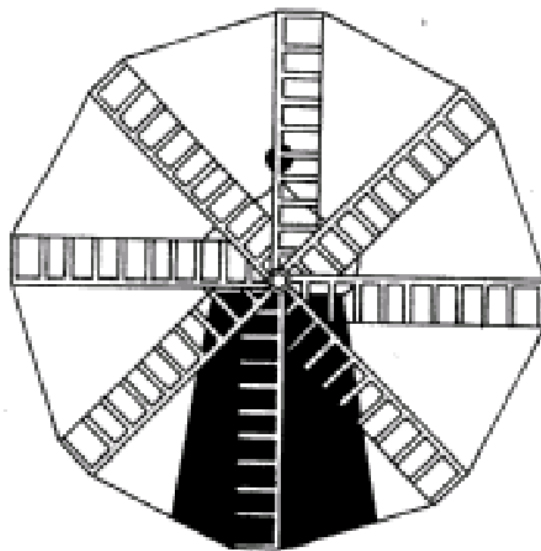
# Educational Visits Policy

## Heckington St. Andrew's C of E Primary School

**Respect + Responsibility + Relationships + Resilience + Reverence**

**Five Rs = Ready for Life**

**"I have come that they may have life, and have it to the full." John 10:10**



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## Contacts

## 1. General

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

Lincolnshire County Council (**the Lead Approver**) acknowledges the immense value of off-site visits and related activities to young people, and fully supports and encourages those that are well planned and managed.

The Lead Approver adopts the Outdoor Education Advisers' Panel 'National Guidance' (NG): [www.oeapng.info](http://www.oeapng.info) NG references in this document hyperlink to specific sections of NG.

In line with current good practice in over 28,000 educational establishments, the Lead Approver uses the robust web-based system 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits [www.evolve.online](http://www.evolve.online). All staff that lead or accompany visits have their own EVOLVE account, which is set up by their school's Educational Visits Coordinator (EVC). As well as a planning tool for staff, EVOLVE also includes additional features such as search and report facilities, downloadable resources, staff records and visit history, plus links to both National Guidance and the National Library [www.national-library.info](http://www.national-library.info).

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

The Lead Approver has commissioned EVOLVE Advice to provide advice, guidance, and support to its schools.

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

## 2. Responsibilities

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

**For community schools, community special schools, voluntary controlled schools, maintained nursery schools, and statutory youth groups**, the employer is the local authority. Establishments that buy into this area of local authority services must adhere to this requirements document.

Where any of the above schools has chosen not to access this area of support from the local authority, then they must ensure that their systems and procedures are equally as robust as would be the case if they were accessing this support. This would include ensuring that National Guidance [www.oeapng.info](http://www.oeapng.info) is followed, that your Educational Visits Coordinator has attended an Outdoor Education Advisers Panel (OEAP) members' EVC course, and that you have access to competent technical advice, for example, via an OEAP member.

The LA does not have the capacity to undertake 'field observation' of visits, and this task is therefore delegated to the head of establishment and/or EVC as part of their supervision responsibilities

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

Refer to National Guidance [Checklists](#)

### 3. Educational Visits Coordinator Training & Role

To help fulfil its health and safety obligations for visits and to comply with DfE Guidance, schools are encouraged to appoint an Educational Visits Coordinator (EVC) who will support the Headteacher. In small schools the Headteacher may be the EVC. Should the school choose not to appoint an EVC, those functions will automatically fall to the Headteacher.

The EVC should attend EVC training (minimum 6 hours) as soon as possible after appointment.

Training provided by a reputable provider is acceptable (such as the courses provided by [www.evolveadvice.co.uk](http://www.evolveadvice.co.uk)). Training may be face-to-face or 'blended', i.e. part e-learning, part webinar – e-learning alone is not sufficient.

Thereafter, update EVC Training or a repeat full course is recommended on a 3 yearly basis.

The EVC should ensure that a record of their training is logged on EVOLVE, as all Visit Forms link to this.

The EVC (or an 'EVC Admin Support') user is responsible for setting up and disabling all EVOLVE accounts (a requirement under UK GDPR). This process is automated via a direct MIS link for schools that subscribe to EVOLVE+ or Premium EVOLVE.

The EVC should support the Headteacher in ensuring that competent staff are assigned to lead and accompany visits, see Section 11, and with approval and other decisions.

The EVC must ensure that a policy is in place for educational and off-site visits, and that this is updated as necessary. This should be uploaded to EVOLVE resources.

Schools should ensure their trained EVCs are listed on the EVC Register.

Refer to National Guidance *Educational Visits Coordinator*

### 4. Visit Leader Training & Role

All leaders have a legal duty of care and must comply with the employer's policy and guidance.

The Visit Leader has overall responsibility for a visit. This includes the learning, development, supervision and welfare of the participants and the health and safety of all, including any other leaders and helpers.

In order to help ensure the safety of participants, and to maximise learning outcomes and enjoyment, it is recommended that visit leaders complete a Visit Leader Training Course.

Visit Leader Training provided by any reputable training provider is acceptable.

Training may be face-to-face, 'blended', or via e-Learning, such as the courses provided by <https://www.evolveadvice.co.uk/vl-training>.

### 5. Approval

Final approval rests with the Head of Establishment for all visits with the exception of:

- Overseas visits
- Residential visits
- Adventurous activity visits

which require The Lead Approver approval. These visits should be submitted to the Lead Approver at least 4 weeks in advance. In approving visits, the Head and EVC should ensure that the visit leader has been appropriately inducted/trained, and is competent to lead the visit, see Section 11.

### What does 'Visit Approved by the Lead Approver' mean?

When the Headteacher authorises a visit on EVOLVE, they are confirming that the visit complies with school and the Lead Approver policy, and that in their opinion the visit leader and any accompanying staff are competent to supervise the visit.

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

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

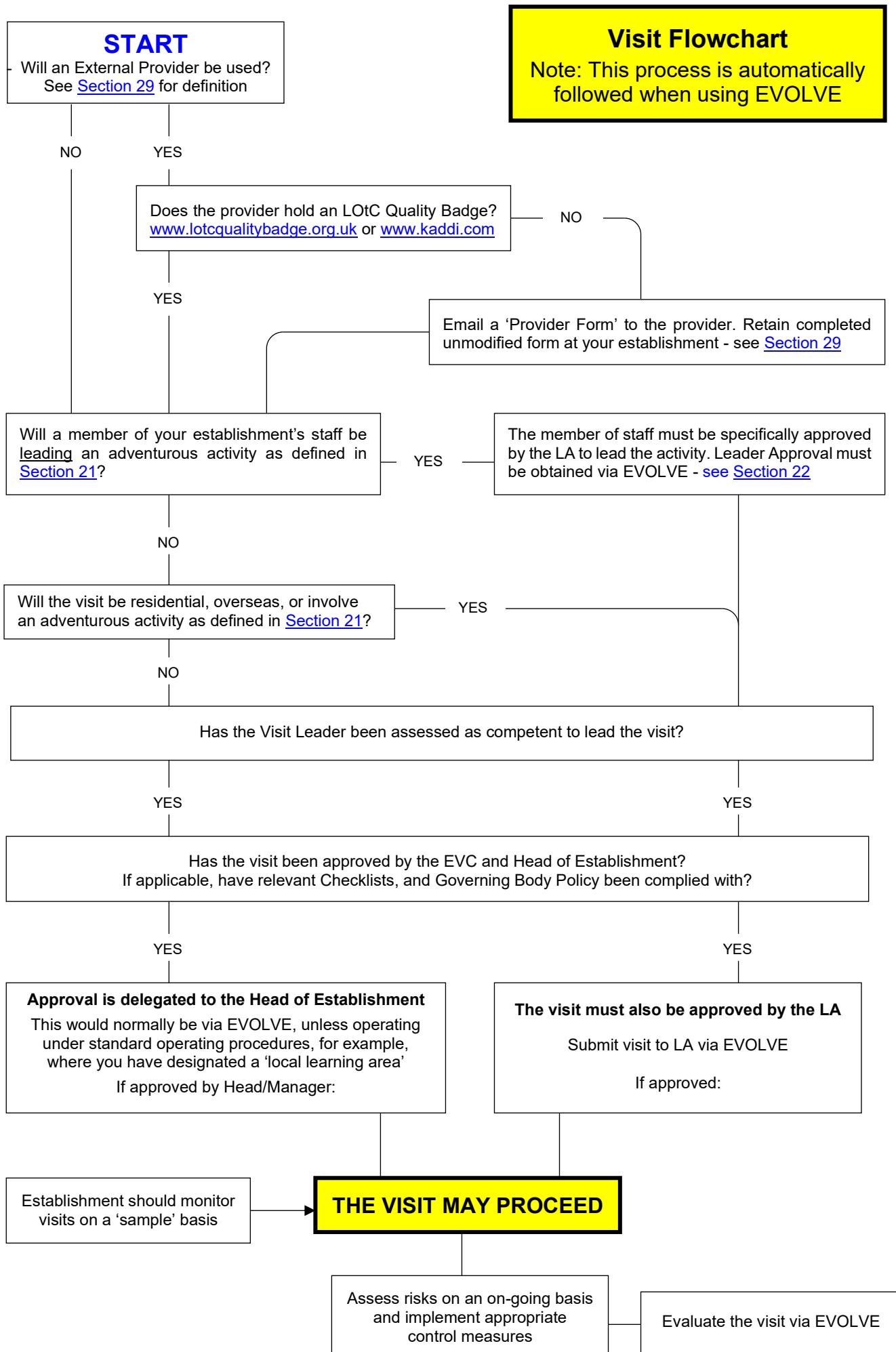
- The competence of the visit leader
- The competence of the accompanying staff
- The ages and level of maturity of pupils, including those with special needs
- The intended learning outcomes
- The proposed itinerary
- The contingency plans in place (eg. Plan B)

The Lead Approver assumes that the Headteacher would not submit the visit for LA approval if they were not satisfied with the intended arrangements.

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

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

Refer to National Guidance document 1b *Foundations*



## 6. Outcomes

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

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

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

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

Refer to National Guidance document 5.1c [Learning Outside and Off-site visits: self-evaluation using the Ofsted framework](#)

[High Quality Outdoor Learning](#) 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.

## 7. Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. You are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Equality Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

It is recommended that students have the opportunity to engage with visits in ways that affirm their identities. This guidance is based on best practice, and should be applied wherever possible, unless the legal context prohibits.

On overnight educational visits, children and young people should be allowed use of an overnight facility that aligns with their gender identity. Students should also have access to other facilities, such as restrooms and changing rooms, that align with their gender identity.

Transgender people may determine which facilities they feel safest and most comfortable using. Any person who is uncomfortable using a shared facility, regardless of the reason, should have access to a safe, practical, and non-stigmatizing alternative.

All students and parents/carers should be given the opportunity to express wishes around rooming on visits. Transgender students, in particular, should be consulted in the trip planning process, to address any potential concerns and needs for privacy. In all cases, student safety should be placed as a top priority.

Under no circumstances should an LGBTQ+ student be denied the opportunity to participate in overnight trips or other opportunities on the basis of their identity. The trip organisers should make all efforts to accommodate any student who desires greater privacy in overnight trips. If the context of a trip is inherently unsafe for LGBTQ+ people, it is recommended that the location or context be reconsidered to ensure safe travel for all participants.

Refer to National Guidance documents 3.2e *Inclusion and 4-4l transgender-young-people- and-visits*

## 8. Planning & Risk Management

### How much planning?

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

- EVOLVE Planning Chart (pdf)
- EVOLVE Planning Chart (video)
- National Guidance document 4.3c *Risk Management – an overview*

### Two levels of documentation: Generic/Event Specific

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

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

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

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

All visits are recorded on EVOLVE, as this reduces bureaucracy, ensures that a robust audit trail exists, and helps evidence learning outcomes.

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

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

EVOLVE: [www.evolve.online](http://www.evolve.online)

National Guidance: [www.oeapng.info](http://www.oeapng.info)

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

Information recorded could include:

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

Additional notes on risk management

- It is not possible to eliminate all risks, but they should be reduced to an *acceptable* or *tolerable* level. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity - see *Managing Risk in Play Provision*. An activity should only take place if, in the professional judgement of the leader, the residual risk following implementation of any control measures is deemed to be acceptable.
- Alternative arrangements (Plan B) should be included within the planning process where appropriate, for example, where weather conditions or water levels might be critical, or where an overcrowded venue might necessitate an alternative option.
- Where an adventurous activity is to be delivered by an external provider, the provider will have responsibility for managing the activity (see Section 31). As such, the provider's risk assessments are not the concern of the school leader, do not need to be requested from the provider, and do not need to be uploaded to EVOLVE. See National Guidance document 6a *FAQ Asking for a provider's risk assessments*

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

Refer to the STAGED approach booklet to support the planning

Refer to National Guidance documents:

- 4.3c *Risk Management – an overview*
- 4.3g *What to Record and How*
- 4.3c *Risk Management – some practical advice for leaders*

## 9. Safety During the Visit

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 emphasised as appropriate during the visit.

The on-going monitoring of all aspects of the visit by the leader and accompanying staff is an essential aspect in the risk management of visits, and hence the safety of participants. It also contributes towards enjoyment and learning.

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

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

Refer to National Guidance documents: 4.3c *Risk Management – an Overview* 3.4k *Responsibilities of the Visit Leader*

## 10. Parent / Carer Consent

### Schools:

Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, it is good practice to inform parents of where their child will be at all times and of any extra safety measures required.

Written consent is usually only requested for activities that need a higher level of risk management or those that take place outside school hours. Parents must be informed of these activities in advance, and given the opportunity to withdraw their child from any particular visit or activity covered by the form. The school must have a robust means of ensuring that changes to parent / carer contact details and child medical details are up-to-date.

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

Refer to National Guidance document 4.3d [Parental Consent](#)

## 11. Competence to Lead

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

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

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

EVOLVE: [www.evolve.online](http://www.evolve.online)

National Guidance: [www.oeapng.info](http://www.oeapng.info)

- g) What experience has the leader of the participants he/she intends to supervise?
- h) What experience has the leader of the environment and geographical area chosen?
- i) Does the leader possess appropriate qualifications?
- j) If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- k) If leading adventurous activities, has this been 'approved' by the LA?
- l) Is the leader aware of all relevant guidelines and able to act on these?

Refer to National Guidance document 3.2d [Approval of leaders](#)

## 12. Staffing and Supervision

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

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

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

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

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

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

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

Refer to National Guidance document 4.2a [Group management and supervision](#)

### Vetting and Disclosure and Barring (DBS) Checks

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

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

Refer to National Guidance document 3.2g [Vetting and DBS Checks](#)

### Direct, Indirect and Remote Supervision

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

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

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

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

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

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

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

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

Refer to National Guidance documents:     4.3b [\*Ratios and Effective Supervision\*](#)  
                                                                 4.2a [\*Group Management and Supervision\*](#)  
                                                                 3.2g [\*Vetting and DBS Checks\*](#)

## **13. First Aid**

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

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

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

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

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

There are many providers of training courses (e.g. [www.strongrootstraining.com](http://www.strongrootstraining.com))

Refer to National Guidance document 4.4b [First Aid](#)

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

## 14. Insurance

Advice regarding insurance may be sought from the Local Authority's Insurance and Risk Team. Contact: Insurance Service 01522 550734 or [insurance@lincolnshire.gov.uk](mailto:insurance@lincolnshire.gov.uk)

For visits abroad, travel insurance **must** be taken out.

The Council will provide worldwide travel insurance automatically to all schools for residential and non-residential trips which buy into the Local Authority's insurance arrangements. Contact the Insurance and Risk Team for further details as all administration is dealt with by the Insurance and Risk Team on behalf of the Insurers.

The responsibility for ensuring adequate insurance cover is in place rests with the Head of Establishment in conjunction with the organiser for each journey.

If alternative insurance arrangements are made, schools must ensure adequate travel insurance is arranged for the trip and the school must talk to their insurance provider to confirm cover at the early planning stage to ensure insurance protection for deposits.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid GHIC (Global Health Insurance Card). See [www.dh.gov.uk](http://www.dh.gov.uk)

Refer to National Guidance document 4.4c [Insurance](#)

## 15. Transport

Refer to National Guidance document 4.5a [Transport general considerations](#)

### PRIVATE CARS

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

Refer to National Guidance documents 4.5c [Transport in private cars](#) & 6.f [FAQ Use of private cars](#)

### COACHES

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.

Refer to National Guidance document 4.5e [Hiring a coach](#)

### MINIBUSES

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

Refer to National Guidance document 4.5b [Transport in minibuses](#)

## WALKING/CROSSING ROADS

This is undoubtedly one of the more dangerous activities leaders and groups will undertake. It should not be assumed that motorists understand or are aware of the needs of the group or of common practices.

Technically, only the police, traffic wardens and officially designated school crossing patrols have the right under law to control traffic. Liaison with the local police may well enable an agreement to be reached over a particular crossing strategy and the use of high-viz tabards or similar. This liaison is recommended where practical. Leaders should consider a progression of options for road crossings:

- Is it possible to plan a route which requires no road crossing at all?
- If roads must be crossed, is it possible to use formal crossing points (e.g. Bridges, Zebra, Pelican...)?
- If no formal point available, consider the 'Wave' approach (see below for operational practice)
- If none of the above are possible and having established that there is not a suitable alternative, it is important to have an agreed and understood procedure which you can apply as well as circumstances allow, as would a responsible person. Focus on a professional approach to Dynamic Risk management, taking account of the group, the leaders, the location and the conditions (traffic, weather, etc.) at the time
- NB: Other than at light controlled or Zebra crossings, cross only when the road is clear of traffic. Do not deliberately plan to physically stop traffic, and do not put adults in the way of moving vehicles. If using light controlled or Zebra crossings, ensure all vehicles have stopped and registered your presence and intentions before crossing. Try to gain eye contact with drivers and monitor all children and traffic throughout. If in doubt, do not proceed.

## 16. Farm Visits

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

Refer to National Guidance document 7g [Farm Visits](#)

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

Refer to: Farming & Countryside Education: [www.face-online.org.uk](http://www.face-online.org.uk)

## 17. Water-Margin Activities

This section applies to:

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

\* 'gentle' means hardly moving at all.

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

If the activity exceeds the above definition, then this is classed as a water-based adventurous activity needing the Lead Approver approval, and Section 24 applies.

If the activity falls within the above definition, this is classed as a 'water-margin' activity and the following applies:

- a) All staff involved in the activity should be conversant with, and adhere to the guidance contained within National Guidance document *7i Group Safety at Water Margins*. This document must be made available to all supervising adults in advance of the visit.
- b) Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.
- c) 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.
- d) Although LA approval is not required for water-margin activities, the leader must have previous relevant experience, and must have been assessed as competent to lead the activity by the EVC, Headteacher, and/or other competent person.

Refer to National Guidance document *7i Group Safety at Water Margins*. Refer to National Guidance document 7i [Group Safety at Water Margins](#)

## 18. Residential Visits

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

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

Refer to National Guidance document 4.2b [Residential Visits](#)

## 19. Overseas Visits

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

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

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

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

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

**For Exchange Visits:** Refer to National Guidance document 7.f [Exchanges and home stays](#)

**For Overseas Expeditions** See [Section 26](#)

## 20. Weather, Clothing & Survival

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

Participants should be adequately clothed appropriate to:

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

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

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

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

## 21. Swimming

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

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

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

### **Swimming pools (lifeguarded)**

LA Approval is not required

- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.

- For publicly lifeguarded pools abroad, the establishment’s staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
- Unless suitably qualified, the establishment’s staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or ‘remote’ supervision.
- For swimming lessons, the LA establishment should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

Refer to National Guidance document 7.x [Swimming pools](#)

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

Establishments should check the lifeguarding position in advance.

LA Approval is not required for this activity.

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

The following awards/qualifications apply:

### For free swimming activity

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

### For structured or programmed activity

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

The role of the lifeguard is:

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

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

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

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

Refer to National Guidance document 7.x [Swimming pools](#)

**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, ie. is it a planned activity?

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

For free swimming activity

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

For structured or programmed activity

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

Refer to National Guidance document 7.o [Natural Water Bathing](#)

## **22. Definition of an 'adventurous activity'**

**The following activities are typically regarded as 'adventurous':**

- All activities in 'open country' (see below)
- Air activities (excluding commercial flights)
- Abseiling
- All forms of boating (excluding commercial transport)
- Camping
- Canoeing / kayaking
- Coastering/coastal scrambling/sea level traversing
- 'Extreme' sports
- High level ropes courses
- Hill walking and Mountaineering
- Horse riding
- Motor sport – all forms
- Off road cycling
- Rafting or improvised rafting
- River/gorge walking or scrambling
- Rock climbing (including indoor climbing walls)
- Sailing / windsurfing / kite surfing
- Swimming (all forms, excluding publicly lifeguarded pools)

- Shooting / archery / paintballing
- Snorkel and aqualung activities
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Trampoline Parks- **visits to these will not currently be approved by the LA**
- Underground exploration
- Use of powered safety/rescue craft
- Water skiing
- Other activities (eg. initiative exercises) involving skills inherent in any of the above

‘Open country’ is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the local authority if you think this might apply. For level of competence required to lead in open country see [Section 24](#)

The following activities are not regarded as adventurous, however, these activities must be supervised by a member of staff who has previous relevant experience and who in the opinion of the EVC and 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 as defined in [Section 17](#)

## 23. Adventurous Activities

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

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

[Open country activities](#) - Section 25

[Snowsports](#) - Section 26

[Overseas expeditions](#) - Section 27

**Trampoline Parks – Section 28**

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 30](#)

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

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

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

**or**

- b) **A member of your establishment's staff** - see [Section 30](#)

This person must be specifically approved by the Head of establishment to lead the activity, via EVOLVE.

## 24. Water-Based Activities

For clarification between water-margin and water-based activities see [Section 17](#)

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

The following are not regarded as adventurous activities for the purposes of this guidance:

- Swimming in publicly lifeguarded pools - see [Section 21](#)
- Water-margin activities as defined in [Section 17](#)
- Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

With the exception of the above, all other forms of water-based activities are regarded as adventurous activities.

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

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

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

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

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

**or**

- b) **A member of your establishment's staff** - see [Section 30](#)

This person must be specifically approved by the Head of establishment to lead the activity, via EVOLVE.

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

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

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

- a) takes place in a swimming pool, **or**

EVOLVE: [www.evolve.online](http://www.evolve.online)

National Guidance: [www.oeapng.info](http://www.oeapng.info)

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

## 25. Open-country activities

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

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

- a) **An external provider** - see [Section 31](#)  
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 Head of Establishment 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,  
- International Mountain Leader Award (IML) [www.mltuk.org](http://www.mltuk.org)
- b) For leaders of walking groups in mountainous terrain within the UK and Ireland  
- Mountain Leader Award (ML) 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 29](#)
- 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.  
- Hill & Moorland Leader Award (HMLA) [www.mltuk.org](http://www.mltuk.org) **or**  
- A written statement of competence by an appropriate technical adviser - see [Section 29](#)
- 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 (CLA) [www.countrysideleaderaward.org](http://www.countrysideleaderaward.org)
  - Lowland Leader Award (LLA) [www.mltuk.org](http://www.mltuk.org)
  - Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL) [www.bst.org.uk](http://www.bst.org.uk)
  - Completion of a suitable 'Leader Training' Course.
  - A written statement of competence by an appropriate technical adviser see [Section 30](#)
  - Evidence of recent, relevant experience, appropriately corroborated.
  - A written statement of competence by an appropriate technical adviser see [Section 30](#)
  - Evidence of recent, relevant experience, appropriately corroborated.
  - An assessment of competence (written or implied) by the Head of Establishment.

## 26. Snowsports

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires Employer approval. There are many advantages to snowsports taking place during term time as opposed to during the school holiday period. These include:

- greater choice generally,
- less queueing for lifts and 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 school 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.

The following courses are recommended for all staff involved in organising or accompanying snowsports visits (but not instructing, leading or supervising on snow):

- Snowsport Visits Training Course (SVT) administered by EVOLVE Advice <http://www.evolveadvice.co.uk/svt>; or
- Snowsport Course Organiser Award (SCO) administered by Snowsport England [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk)

In addition, the visit leader should ideally have previous experience of accompanying snowsports visits.

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. Schools should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.

Helmets must be worn by all participants during snowsport activities.

A member of staff intending to lead skiing or snowboarding (i.e.. not using a ski school) must be qualified as below and have been approved by the Headteacher via EVOLVE- see Section 30

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

- The Alpine Ski Course Leader Award (ASCL) [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) **or**
- The Alpine Ski Leader Award (ASL) [www.snowsportscotland.org](http://www.snowsportscotland.org) **or**
- A statement of competence by an appropriate 'technical adviser' - see [Section 29](#)

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

- The Snowboard Leader Award (SBL) administered [www.snowsportscotland.org](http://www.snowsportscotland.org) **or**
- A statement of competence by an appropriate 'technical adviser' - see [Section 29](#)

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

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

- a) under the direction of a suitably qualified local instructor, AND
- b) they will remain within the designated controlled areas, AND
- c) off-piste activities are specifically included within the visit insurance policy, AND

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

Refer to National Guidance document 7.v [Snowsport visits](#)

## 27. 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.

Overseas Expeditions will only be approved by the Lead Approver if the provider either:

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

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

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

Refer to National Guidance document 7.q [Overseas Expeditions](#)

## 28. Trampoline Parks

This section refers to Trampoline Parks. It does not cover coaching trampolining as a gymnastic activity, or clubs or centres registered with British Gymnastics, for which the Association for Physical Education guidance should be followed.

Schools should follow National Guidance document 7d *Trampoline Parks*

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

### Aqua Parks

'Aqua Parks' is classified as an adventurous activity and should therefore be entered on EVOLVE. However, the final approval has been set at Head level upon confirmation that the provider is an RLSS approved aqua park - <https://www.rlss.org.uk/Listing/Category/aqua-parks>.

Refer to NG 7.1z Visitor attractions

## 29. Emergency Procedures

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

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

For visits that take place outside normal establishment hours:

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

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

Refer to National Guidance Documents: 4.1i [Emergencies and critical incidents](#)  
4.1b [Emergencies – The establishment’s role](#)  
4.1c [Emergencies – Guidance for leaders](#)

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

#### PROCEDURE FOR OBTAINING APPROVAL

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

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

On receipt of a Visit Form (and embedded ALF), the Headteacher should view the proposed activity in the context of the leader’s competencies and qualifications. If the Headteacher does not have the competence to make this judgement then he/she should enlist the help of a suitably qualified ‘Technical Adviser’ see below, or contact the LA for further advice.

#### CRITERIA FOR APPROVAL

Approval should normally be granted 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.

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

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

Approval should 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.

## Technical Adviser

For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Board.

For further clarification regarding a technical adviser see [Adventure Activity Qualifications](#) in National Guidance.

## 31. 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 where instruction is provided by climbing wall staff
- Freelance instructor of adventurous activities
- Youth Hostel (where instruction is provided)
- Voluntary organisation (e.g. Scout Association), where instruction is provided

For the purposes of this guidance, an External Provider is NOT a:

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc
- Campsite
- Museum, gallery, etc
- Tourist attraction
- Theme Park
- Farm
- 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) ([Section 29](#) applies)
- 'Volunteer' instructor of adventurous activities (see below)

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

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

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

- a) The Provider holds a LOTC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) or [www.kaddi.com](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 a LOTC Quality Badge, then a Provider Form is still required.

## Procedure for Providers that hold a LOfC Quality Badge

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

## Procedure for Providers that do not hold a LOfC Quality Badge

- Download a [Provider Form](#) from EVOLVE Resources.
- Complete the top section.
- Send Provider Form to the provider.
- On its return check that it has been satisfactorily completed.
- Upload the completed Provider Form to EVOLVE, - or keep on file.

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

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

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

In some instances, for example where an establishment intends to use an 'external', **voluntary** individual for services, then this person may be regarded as a temporary member of staff and the procedure outlined in [Section 29](#) may be appropriate.

See National Guidance documents:      4.4h [Using external providers and facilities](#)  
6a FAQ [Asking for a provider's risk assessments](#)

## For completion by 'external providers' used by Lincolnshire County Council establishments

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

Establishment ..... Staff member in charge .....

Date(s) of visit ..... Name of provider .....

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

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

### SECTION A - ALL VISITS

#### Health, Safety, and Emergency Policy

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

#### Vehicles

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

#### Staffing

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

#### Insurance

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

#### Accommodation (if provided)

8. UK accommodation has comply with current fire regulation requirements (Regulatory Reform, (Fire Safety) Order 2005) ☐
9. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned. ☐
10. There are appropriate security arrangements to prevent unauthorised persons entering the accommodation. ☐
11. Separate male and female accommodation and washing facilities are provided and staff accommodation is close to participants' accommodation. ☐

### SECTION B - ADVENTURE ACTIVITIES AND FIELD STUDIES IN OUTDOOR ENVIRONMENTS

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

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

### Activity management

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

### SECTION C - TOUR OPERATORS

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

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

### SECTION D - OVERSEAS EXPEDITIONS

25. The provider complies with '[Guidance for Overseas Expeditions, Edition 4](#)' (GOE4). ☐

If any of the above specifications cannot be met or are not applicable, please give details:

Details of any other accreditation, eg with National Governing Bodies, tourist boards, etc.

### DECLARATION

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

Signed ..... Date .....

Name (print) ..... Position in organisation.....

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

.....

Tel ..... E-mail .....

Note: This can be completed online within EVOLVE

EVENT SPECIFIC NOTES

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

Visit details..... Carried out by ..... Date .....

| ISSUE<br><br>Consider SAGE:<br>Staff, Activity, Group, Environment | HOW TO MANAGE IT | WHO TO BE INFORMED |       |              |
|--------------------------------------------------------------------|------------------|--------------------|-------|--------------|
|                                                                    |                  | PARENTS            | STAFF | PARTICIPANTS |
|                                                                    |                  |                    |       |              |
|                                                                    |                  |                    |       |              |
|                                                                    |                  |                    |       |              |
|                                                                    |                  |                    |       |              |
|                                                                    |                  |                    |       |              |
|                                                                    |                  |                    |       |              |
|                                                                    |                  |                    |       |              |

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

## Use of a private car to transport young people

|          |                                     |
|----------|-------------------------------------|
| <b>1</b> | To: The Head of _____ Establishment |
|----------|-------------------------------------|

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

|          |                                    |
|----------|------------------------------------|
| <b>2</b> | Signed: _____<br>Print name: _____ |
|----------|------------------------------------|

|          |                                           |
|----------|-------------------------------------------|
| <b>3</b> | Address: _____<br>_____<br>_____<br>_____ |
|----------|-------------------------------------------|

|          |             |
|----------|-------------|
| <b>4</b> | Date: _____ |
|----------|-------------|

The LA and the establishment reserve the right at any time to request copies of any relevant documentation i.e. Registration Document, MOT, Insurance, Driving Licence

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

# Emergency Card (Visit Leader)

**This 'card' must remain with the Visit Leader at all times on a visit**

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

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

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

## Lincolnshire County Council Emergency Contact

**01522 582220** (Office hours)

**01522 888111** (Outside of office hours, request a call back from the

emergency duty officer)

Be prepared to give:

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

You will be called back as soon as possible so try not to make outgoing calls until contact is made. You will be given advice and asked what the LA can do to support you.

Then:

- Contact your establishment, EVC or Home Contact (see below) and seek further advice. If you are unable to do this, the LA will contact your establishment on your behalf.
- If practicable, delegate party leadership to the Deputy Leader, in order that you can be contactable at all times, and to enable you to coordinate all necessary actions;
- You will be provided with a dedicated number to refer all press, media, parental, or other enquiries to the LA and for continuing contact with the LA during the incident.
- Wherever possible, prevent group members from using telephones or mobiles, or going on-line until such time as this has been agreed by the LA;
- Do not allow any member of the group to discuss liability with any other party.

## When the incident is under control:

- Seek further and full details of the incident, how and why it happened so far as can be established at this stage;
- Maintain a detailed written log of all actions taken and conversations held, together with a timescale – It may be appropriate to ask someone else to do this;
- Contact the British Consulate / Embassy if abroad.

| Name                                          | Home                                                                                 | Mobile |
|-----------------------------------------------|--------------------------------------------------------------------------------------|--------|
| Establishment                                 |                                                                                      |        |
| Lincolnshire County Council Emergency Contact | 01522 582220 (Office hours)<br>01522 888111 (Outside of office hours, request a call |        |

|  |                                                 |  |
|--|-------------------------------------------------|--|
|  | <b>back from the emergency<br/>duty officer</b> |  |
|--|-------------------------------------------------|--|

If the visit will be outside normal establishment hours:

| <b>Name</b>                                                   | <b>Home</b> | <b>Mobile</b> |
|---------------------------------------------------------------|-------------|---------------|
| Establishment 'Home' Contact                                  |             |               |
| Head of Establishment /<br>Chair of Governing Body (optional) |             |               |
| Other/EVC                                                     |             |               |

## Emergency Card (Home Contacts)

For visits that take place outside normal establishment hours.

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

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

In the event of being contacted by the Visit Leader (or other member of staff involved in a visit), you should:

- Confirm the phone number at which the caller can be contacted back on;
- Note their location;
- Determine the nature of the emergency;
- Determine the type of help required.

If the incident does not involve serious injury or fatality, and/or is not likely to attract media attention:

- Provide the required assistance if possible;
- Seek further advice or pass on details to other establishment contacts who may be able to assist.

If the incident does involve serious injury or fatality, and/or is likely to attract media attention:

- Inform the Visit Leader that someone will phone him/her back as soon as possible;

It is the responsibility of the Visit Leader to contact the LA. However circumstances may prevent this. If you are not 100% positive that the LA has been contacted, please contact Lincolnshire County Council 01522 582220 (Office hours) or 01522 888111 (Outside of office hours, request a call back from the emergency duty officer) and state that you require immediate assistance from the Emergency Response Team. Give brief details of the incident.

- Your details will be taken and you will be phoned back as soon as possible;
- You should also contact the Head of Establishment (if this is not you);
- A Response Team will be brought into action to support the party, the establishment, and the parents. Teams of senior officers are briefed for this role and will provide continuous support from the moment the emergency occurs. The team would operate from the Emergency Control Centre and the Head of Establishment or a senior member of staff may be asked to join the team immediately;
- The Head of Establishment should consider the appropriate time to contact the parents of the participants involved on the visit. Advice and support can be sought from the LA in dealing with this.
- The Response Team will form a continuous link with the affected group, and depending on the level of emergency will send a senior officer to the incident location. The Response Team will direct all actions; provide links with the media, rescue agencies, tour operators, insurance companies, etc. As appropriate the Response Team would arrange for the return of the party or arrange other transport where required;
- You will be provided with a dedicated number to refer all press, media, parental, or other enquiries to the LA and for continuing contact with the LA during the incident.
- The LA will give accurate and periodic information through press releases, will arrange interviews, and will attempt to reduce media pressure from the incident, establishment, and parents. If appropriate, support and counselling will be arranged for families, participants and staff.

| Name                  | Home | Mobile |
|-----------------------|------|--------|
| Head of Establishment |      |        |

|                                                      |                                                                                                                                                |  |
|------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Deputy Head of Establishment                         |                                                                                                                                                |  |
| Chair of Governing Body (optional)                   |                                                                                                                                                |  |
| Other/EVC                                            |                                                                                                                                                |  |
| <b>Lincolnshire County Council Emergency Contact</b> | <b>01522 582220 (Office hours)<br/>01522 888111 (Outside of<br/>office hours, request a call<br/>back from the emergency<br/>duty officer)</b> |  |

## Contacts

|                                                                                           |                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>EVOLVE</b>                                                                             | <a href="http://www.evolve.online">www.evolve.online</a>                                                                                                                                                                                                                     |
| <b>Educational Visits Advisers</b>                                                        | <p>Jake Wiid</p> <p><a href="mailto:jake@evolveadvice.co.uk">jake@evolveadvice.co.uk</a></p> <p>Andrew Smith</p> <p>0115 947 6202 Ext 238</p> <p>Emergency Support: 07944 038678</p> <p><a href="mailto:andrew.smith@collegest.org.uk">andrew.smith@collegest.org.uk</a></p> |
| <b>Health &amp; Safety Unit</b>                                                           | <a href="mailto:corporatehealth&amp;safety@lincolnshire.gov.uk">corporatehealth&amp;safety@lincolnshire.gov.uk</a>                                                                                                                                                           |
| <b>Insurance Section</b>                                                                  | <p>01522 550734</p> <p><a href="mailto:insurance@lincolnshire.gov.uk">insurance@lincolnshire.gov.uk</a></p>                                                                                                                                                                  |
| <b>Lincolnshire County Council<br/>Emergency Contact (24/7)</b>                           | <p>01522 582220 (Office hours) 01522 888111</p> <p>(Outside of office hours, request a call back from the emergency duty officer)</p>                                                                                                                                        |
| <b>First Aid Training, Fire Marshal<br/>Training and Health &amp; Safety<br/>Training</b> | <a href="http://www.strongrootstraining.com">www.strongrootstraining.com</a> (other reputable providers are also acceptable)                                                                                                                                                 |

**EVOLVE** [www.evolve.online](http://www.evolve.online)

**National Guidance** [www.oeapng.info](http://www.oeapng.info)

**National Library** [www.national-library.info](http://www.national-library.info)

**LOtC Quality Badge** [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**Council for Learning  
Outside the Classroom** [www.lotc.org.uk](http://www.lotc.org.uk)

**Outdoor Education  
Advisers' Panel** [www.oeap.info](http://www.oeap.info)