



## Off-Site Visits Policy

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## **Forms**

<a href="#">Provider Form</a>	For Providers without LOTC Quality Badge
<a href="#">ESN</a>	Event Specific Notes
<a href="#">Private Car</a>	Use of a private car to transport participants
<a href="#">Emergency Card (Visit Leader)</a>	
<a href="#">Emergency Card (Home Contacts)</a>	

## **Contacts**

# 1 General

St Mary and All Saints C of E Primary School has adopted the requirements of Reading Borough Council and EVOLVE for the management of their off-site visits.

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

The LA has adopted the Outdoor Education Advisers' Panel 'National Guidance': [www.oeapng.info](http://www.oeapng.info) Reference is made to National Guidance throughout this document.

The LA uses the web-based system 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits. All staff that lead or accompany visits can access their own EVOLVE account, which is set up by their establishment's Educational Visits Coordinator (EVC). As well as 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 [www.national-library.info](http://www.national-library.info), staff records and visit history, on-line parental consent, etc. EVOLVE: [https://evolve.edufocus.co.uk/evco10/evchome\\_public.asp?domain=rbcvisits.org.uk](https://evolve.edufocus.co.uk/evco10/evchome_public.asp?domain=rbcvisits.org.uk)

## 2 Responsibilities

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

- For community schools, community special schools, voluntary controlled schools, maintained nursery schools, pupil referral units, and statutory youth groups, the employer is the local authority. These establishments must adhere to this requirements document. The LA monitors these visits on a sample basis via EVOLVE. The LA does not have the capacity to undertake 'field observation' of visits, and this task is therefore delegated to the head of establishment and/or EVC.
- For academies, foundation, independent, and voluntary aided schools, the employer is usually the governing body or proprietor. Although welcome to do so, these establishments are not obliged to use the guidance of the LA. If using LA guidance, this should be clearly stated. If not using LA guidance, establishments are advised to ensure that the systems in place are equally as robust as those of the LA.

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

Refer to: '[Planning Basics](#)' and '[Checklists](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 3 Role of the Educational Visits Coordinator

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

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

The EVC should attend initial EVC training as soon as possible after appointment. Subsequent update training or a repeat full course is particularly recommended for those who are involved in the role infrequently. Courses can be found by contacting [Training@reading.gov.uk](mailto:Training@reading.gov.uk).

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

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

Establishments are advised to consider the merits of adapting the sample 'Educational Visits Checklist' (Word version in EVOLVE Resources) to suit their own particular circumstances, and uploading this to their establishment's own EVOLVE Resources section.

Refer to: '[Educational Visits Coordinator](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 4 Finance and Charging

### 4.1 Terminology and charging

The laws relating to charging for offsite activities by educational establishments only applies to establishments which are in the category of schools, colleges and any other unit that comes within the education service.

a. **A charge is:**

Any sum payable by a parent for an optional extra to which they had agreed or for board and lodging. It is recoverable as a civil debt.

b. **An optional extra is:**

An activity which takes place outside establishment hours;

- Parents can choose whether their children attend or not;
- Makes no profit from any charges made;
- Divides costs equally among all pupil participants
- (that is charges on some cannot be used to subsidise others);
- Cannot involve a charge for alternative provision for any pupils not attending;
- Is not a statutory curriculum requirement.

c. **A voluntary contribution:**

Is a sum of money that an establishment has asked parents to pay on a voluntary basis. Establishments can request voluntary contributions for anything. In so doing they must ensure that:

- The contribution is genuinely voluntary;
- Pupils are not treated differently because their parents choose not, or are unable, to pay

### 4.2 Possible types of funding

In this context there are three distinct categories of off-site activity:

- Activities which take place out of establishment time;
- Activities which take place during establishment time;
- Activities financed by voluntary contribution

There are statutory criteria which determine whether an activity can be charged or not. Please see the school's Charging and Remissions Policy.

The form of funding that is possible will depend on the category of an activity. It is always possible for an establishment to subsidise an activity from the funds available to them, providing that the subsidy is in line with the school's charging policy. It is also always possible for activities to be funded by voluntary contributions provided the criteria are met.

#### 4.3 Deciding on types of funding

It is for the establishment to decide on the procedures they should adopt but in considering they might find it helpful to use the following:

- Ensure that parents are fully aware of the nature and value of the activity and the nature and amount of funding required.
- Decide whether the activity will be classed as being in school time or out of school time.
- Decide what types of funding can and will be used;
- Ensure that parents are fully aware of the nature and value of the activity and the nature and amount of funding required.

Ensure that the necessary level of funding is available before the school is financially committed

#### 4.4 What can be charged for?

The number of circumstances in which a school can charge parents is limited.

The only two areas in which charges can be made are off-site activities are board and lodging and optional extras.

This is based on the Charging provisions of the Education Act 1988 and represents the statutory minimum requirement.

It is always possible to ask for voluntary contributions from parents.

#### 4.5 What schools must pay from official funds

Where an activity is part of the syllabus of a prescribed examination or is required to fulfil statutory duties relating to the National Curriculum or to religious education, then the activity must be paid for out of official funds on the following basis:

- **All transport and tuition costs (including teaching materials) must be covered by the school;**
- a charge can be made for **board and lodging;**
- where a pupil's parents receive Income Support or other statutory benefits such as free school meals then the school must also cover the cost of board and lodging.

Only two categories are at present recognised as forming part of the syllabus of a prescribed examination. These are field studies courses that are necessary for any **'A' level and GCSE courses.**

#### 4.6 Voluntary contributions by parents

The advice of the Education Department is that voluntary contributions are the most effective, reasonable and easiest way of funding most off-site activities.

Schools relying on voluntary contributions from parents in order to fund an activity should make this clear at the outset in order to avoid disappointment should parents decide not to pay. In such cases schools may decide to use their own funds to cover the costs of those who cannot or who are not prepared to contribute.

**When considering voluntary contributions schools should advise parents that if insufficient voluntary contributions are received then the visit may have to be cancelled. Schools should also advise parents that in the event of cancellation due to insufficient funds being received any money paid to a tour company or to an activity provider up to the point of cancellation might be not recoverable.**

Schools might find it appropriate to seek voluntary contributions to a school fund which could then be used to fund activities. This has the advantage of knowing the amount of funding available in advance.

#### 4.7 **Optional extras**

Because of the way that the law dictates how activities in and out of school time must be distinguished, the number of activities that can be classed as optional extras will be relatively small.

Charges for an optional extra can include:

- travel;
- board and lodging for pupils;
- materials, books, other equipment and entrance charges to facilities;
- non-teaching staff costs;
- school journey insurance;
- the cost of engaging supervisory staff for the activities and paying their travel, board and lodging and, where appropriate a fee.

#### 4.8 **Optional extras and separate contracts for staff**

Where the staff supervising an optional extra activity are also employed by the LA, and where there is an element of teachers' expenses in the charge to parents, then they should be employed on a separate contract for services to provide the optional extra. They would be paid their salary in the normal way and the position with regard to liability insurance would remain the same.

The contractual statement need say no more than that the member of staff is employed on the same terms and conditions as apply to the individual's principal contract of employment.

**Please note** – If a school uses voluntary contributions rather than a charge for funding an optional activity then the requirements listed above, would not apply.

## 4.9 Outside agencies

The requirements on what parents can and can't be charged do not apply if an outside agency is charging parents. This is of limited use to schools as a practical way forward. The school must have no connection with the outside agency and it could not, therefore, initiate an off-site activity arranged in this way.

**Please Note:** Anyone attempting to contrive a situation which allowed a school to initiate an activity and subsequently charge parents through an outside agency would be at risk of breaking the law.

## 5 Approval of Visits

In approving visits the Head of Establishment and EVC should ensure that the visit leader has been appropriately inducted/trained, and is competent to lead the visit, see [Section 11](#)

**'Ad-hoc' activities:** Where there are local activities that are a planned part of the curriculum but are dependant upon the right conditions on the day, then the visit leader should sign out before departure leaving relevant information with the base contact, for example using the 'Sign Out' sheet in EVOLVE resources. Such activities must be addressed in the school policy with a generic management plan in place. Following the activity, visit leaders are encouraged to record the event on the same day on EVOLVE.

**All other visits:** It is recommended that all other visits are entered onto EVOLVE, in order to aid planning and reduce bureaucracy.

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

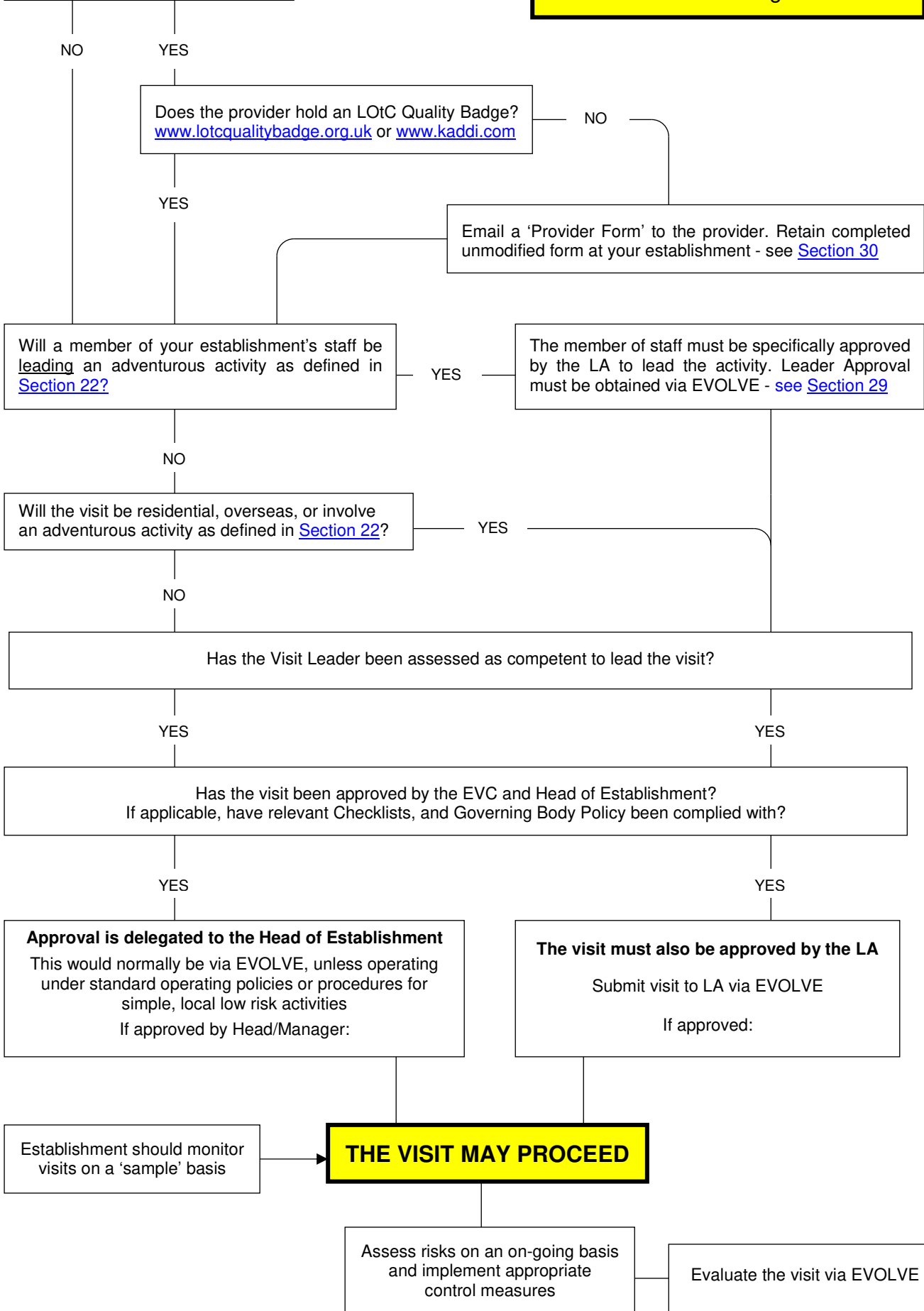
The following visit types are 'authorised' within the establishment, and then 'approved' by the LA via EVOLVE:

- overseas
- residential
- involving an adventurous activity as defined in [Section 22](#)

Approval is delegated to the Head of Establishment for visits not in the above categories.

**START**  
Will an External Provider, Activity Centre or Tour Operator be used?

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





## 6 Outcomes

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

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

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

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

Refer to: '[Evaluation](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

[High Quality Outdoor Education](#) can be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. 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. Schools are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Equality Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

Refer to: '[Inclusion](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 8 Planning

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

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

- [Planning with EVOLVE](#) diagram.
- [RADAR](#) model: based on STAGED: Staffing, Timings, Activity, Group, Environment, Distance.

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, LA policy, etc. These, in conjunction with the EVOLVE Visit Form may be sufficient for a particular visit, as it is not necessary to repeat generic policies on EVOLVE.

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

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

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

Planning that includes adventurous activity commonly involves delivery by an external provider ([see Section 30](#)) and the provider will have responsibility for managing the activity. As such, the provider's risk assessment is not the concern of the establishment leader, does not need to be requested from the provider, and does not need to be uploaded to EVOLVE.

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.

Examples of generic offsite risk assessments can be found in EVOLVE Resources. The Risk Assessment Code of Practice can also be found in EVOLVE Resources.

- this is endorsed by HSE in [Principles of Sensible Risk Management](#)

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

Refer to: '[Responsibilities of the Visit Leader](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)  
DfE document: [A Handbook for Group 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 reemphasised as appropriate during the visit.

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

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

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: '[Responsibilities of the Visit Leader](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)  
DfE document: [A Handbook for Group Leaders](#)

## 10 Parent / Carer Consent

### 10.1 When is parental consent necessary?

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

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

### 10.2 Day activities within the locality

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

### 10.3 Information for parents where full consent might not be needed

Circumstances might arise where a headteacher decides that the formal **OHA 2** parental consent form is not necessary for day visits or short duration.

In this case it would be advisable for parents to sign a note to indicate that they have received and understood the information.

Where a series of short visits are to be made over a period of weeks e.g. swimming lessons or community work, one consent should be sufficient for the whole series. Such consent should not be allowed to extend over more than one year and may be required over a shorter period such as

every term. It might be necessary to ensure that medical information is kept updated in such cases.

#### **10.4 Parental consent and medical form OHA 2**

The Education Authority Parental Consent and Medical Form OHA 2 should be used in all cases where full consent is to be obtained. It must have all necessary information attached to it when it is given to parents.

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

#### **10.5 Medical Consent**

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

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

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

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

**All:** Refer to: '[Parental Consent](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 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?
- 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: '[Assessment of Competence](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)  
Diagram: [Planning with EVOLVE](#)

## 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 (available on EVOLVE) 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 and requirements of individuals within the group, including those with additional needs;
- the experience and competence of staff and other adults;
- the venue, time of year and prevailing/predicted conditions, if applicable;
- the contingency, or 'Plan B' options.

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

Visit leaders, EVCs and Heads/Managers often find it helpful to have 'a starting point for consideration'. Where departure from the starting point results in fewer staff, the justification should be recorded as a note on EVOLVE. See Underpinning Framework on National Guidance [www.oeapng.info](http://www.oeapng.info)

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.

## 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: '[Vetting and DBS Checks](http://www.oeapng.info)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 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.

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

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

['Ratios and Effective Supervision'](#)

['Group Management and Supervision'](#)

['Vetting and DBS Checks'](#)

## 13 First Aid

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

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

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

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

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

Refer to: '[First Aid](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)  
[Statutory Framework for the Early Years Foundation Stage](#)

First Aid Code of Practice EVOLVE Resources

## 14 Insurance

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

Derek Crisp, Principal Accountant  
Telephone: 0118 937 2745  
E-mail: [Derek.crisp@reading.gov.uk](mailto:Derek.crisp@reading.gov.uk)

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

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

EVOLVE has replaced the need to complete the OHA 1 form.

Refer to: '[Insurance](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 15 Transport

Refer to: '[Transport general considerations](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### 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: '[Transport in private cars](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

Refer to: '[FAQ6 Use of private cars](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### 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.

### MINIBUSES

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

Refer to: '[Transport in minibuses](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### PUBLIC TRANSPORT IN LONDON

For public transport within the Greater London area contact 'Transport for London', who offer free travel for establishment parties on London buses, Underground, Tramlink, and Docklands Light Railway, to cultural destinations. See [Transport for London](#) Tel. 020 7918 3954.

## 16 Farm 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: Farming & Countryside Education: [www.face-online.org.uk](http://www.face-online.org.uk)

'[Farm Visits](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)



## 17 Water-Margin Activities

This section applies to:

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

\* 'gentle' means hardly moving at all.

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

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

At the outset the leader must decide whether the activity:

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

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

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

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

Refer to '[Natural Water Bathing](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 18 Residential Visits

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

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

Refer to: '[Residential Visits](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 19 Overseas Visits

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

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

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

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

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: [www.fco.gov.uk](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 EHIC (European Health Insurance Card). See [www.dh.gov.uk](http://www.dh.gov.uk)

**For exchange visits:**

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

For Overseas Expeditions see [Section 27](#)

Refer to: '[Overseas Visits](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 20 Weather, Clothing & Survival

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

Participants should be adequately clothed appropriate to:

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

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

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

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

## 21 Swimming

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

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

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

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

### Swimming pools (lifeguarded)

LA Approval is not required

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

Refer to: '[Swimming in a Swimming Pool](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### Hotel (and other) swimming pools

Establishments should check the lifeguarding position in advance.

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

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

The following awards/qualifications apply:

#### 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 (NRASTAC) 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)

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: '[Swimming in a Swimming Pool](http://www.oeapng.info)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

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

LA Approval is required via EVOLVE.

Particular consideration should be given to the following factors:

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

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

For free swimming activity

- A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see [www.lifesavers.org.uk](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 (NRASTAC) 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. (available from 2013) see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

Refer to '[Natural Water Bathing](http://www.oeapng.info)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 22 Definition of an ‘adventurous activity’

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

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

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

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

- Walking in parks or on non-remote country paths
- 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](#)

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

## 23 Adventurous Activities

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

[Water-based activities](#) - Section 23

[Open country activities](#) - Section 24

[Snowsports](#) - Section 25

[Overseas expeditions](#) - Section 26

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

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

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

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

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

## 24 Water-Based Activities

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

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

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 LA approval:

- 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, and as such require LA approval.

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

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

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

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

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

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

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

## 25 Open-country activities

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

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

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

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

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 29](#) see below

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

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

- a) For leaders of walking groups outside the UK or Ireland, please contact the LA for further guidance.
- b) For leaders of walking groups in mountainous terrain within the UK and Ireland
  - Mountain Leader Award (Summer or Winter as appropriate) [www.mltuk.org](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.
  - Walking Group Leader Award [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. See [www.countrysideleaderaward.org](http://www.countrysideleaderaward.org)
  - Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL). See [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 29](#)
  - Evidence of recent, relevant experience, appropriately corroborated.
  - An assessment of competence (written or implied) by the Head of Establishment.



## 26 Snowsports

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

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

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

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

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

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

A member of staff intending to lead skiing or snowboarding (ie. not using a ski school instructor) must be qualified as below and have been approved by the LA via EVOLVE- see [Section 29](#)

**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.

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

Refer to '[Snowsport visits](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 27 Overseas Expeditions

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

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

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

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

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

- a) Holds an LOfC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) **or**
- b) Provides a statement of compliance with [Guidance for Overseas Expeditions, Edition 3](#)

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

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

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

Refer to: '[Overseas Expeditions](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 28 Emergency Procedures **this section is under review by Emergency Planning Officer**

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

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

For visits that take place outside normal establishment hours:

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

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

There should be a clear audit trail of responsibilities, with agreed processes to put in place an appointed Lead Manager (LM) to take charge of any given incident on a 24/7 basis. They will need to have effective access to a support group that is ( ), seconded from within a group of designated staff that have been delegated the responsibility to coordinate the employer's central response, supported by other departments and/or agencies under Reading Borough Council's "Incident reporting and Investigation Policy & Procedure OHS

(P):2” which can be accessed through the Council’s Intranet via the link below. This provides guidance on the management of critical incidents and the relevant contact details required.

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

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

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

## 29 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 22](#), must first upload details and scanned copies of all relevant qualifications (eg instructor certificates, first aid, etc) to the ‘My Details’ section of their EVOLVE account.

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

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

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

### CRITERIA FOR APPROVAL

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

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

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

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

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

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

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

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

## 30 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 LA approval, an External Provider is NOT a:

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc
- Campsite
- Museums, galleries, etc
- Tourist attractions
- Theme Parks
- Farms
- Coach, Train, or Airline company
- Swimming Pool
- Climbing Wall where instruction is provided by a member of your establishment's staff with an approved Activity Leader Form (ALF) ([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 'approve' external providers or tour operators. Establishments will find it useful to 'Search by External Provider' on EVOLVE, and liaise with other LA establishments that have used a particular provider.

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

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

- a) The Provider holds an LOtC Quality Badge [www.lotcqualitybadge.org.uk](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 an LOtC Quality Badge, then a Provider Form is still required.

Note: from 2014, EVOLVE will automatically identify providers that hold an LOtC Quality Badge, via the search tool Kaddi [www.kaddi.com](http://www.kaddi.com)

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

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

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

## PROCEDURE

- Download a [Provider Form](#) from EVOLVE.
- Complete the top section.
- Send Provider Form to the provider (email, fax, post).
- On its return check that it has been satisfactorily completed.
- Keep Provider Form on file together with all other relevant documentation.
- It is not necessary to attach the Provider Form to EVOLVE.

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

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

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

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.

The above procedure is **not** sufficient for Overseas Expeditions (ie. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and **must** be complied with, see [Section 27](#)

## Monitoring and evaluation

This policy will be reviewed by the Governing Board on a regular basis.

## For completion by ‘external providers’ used by Reading Borough Council establishments

Providers that do not hold an LOtC Quality Badge and that are to be used by establishments from Reading Borough 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 is covered by a current fire certificate or advice has been sought from a fire officer and implemented, and a fire risk assessment has been completed.
- 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 3' (GOE3).

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

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

**DECLARATION**

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

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

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

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

.....

Tel ..... Fax..... E.mail .....

## EVENT SPECIFIC NOTES

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

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

<b>ISSUE</b> Consider STAGED: <b>S</b> taff, <b>T</b> imings, <b>A</b> ctivity, <b>G</b> roup, <b>E</b> nvironment, <b>D</b> istance	<b>HOW TO MANAGE IT</b>	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

**READING BOROUGH COUNCIL EDUCATION DEPARTMENT**

For use when transporting pupils by private car

**SCHOOL:**

Dear

Use of Private Cars for Transporting Pupils

I am grateful for your offer of assistance with transporting pupils. As I am sure you will appreciate it is important, from the point of safety, the school and yourself, that the position with regard to the use of private vehicles in this context is clear. The following applies:

**While pupils are travelling in any private motor vehicle the Council's liability insurance does not apply.** Therefore in the event of any claim being made, any claim costs would have to be borne by the insurance covering the vehicle. It is essential, therefore, to check with your vehicle's insurers that your policy is valid for these purposes, which may be construed as a form of business use, as most people only insure their vehicles for 'social, domestic and pleasure use'. Insurance must be Full Comprehensive cover.

In additions to the above, road tax, insurance cover, MOT certificate and full driving licence must be valid when transporting young people, seat belts must be fitted and worn at all times and when necessary booster seats must be supplied and used.

I would be grateful if you would countersign and return this form indicating that you have read and understood what is stated above and where necessary supply copies of any documentation that may be asked for.

If and when you sign and return the form, it will keep it on file so that we do not have to repeat the exercise on any similar occasion in the future. Thank you for your offer of assistance.

Yours sincerely

Headteacher

**I HAVE READ AND UNDERSTOOD THE INFORMATION AND INSTRUCTIONS CONTAINED IN THE ABOVE, AND HAVE VERIFIED WITH MY INSURERS THAT I AM INSURED TO TRANSPORT PUPILS IN MY VEHICLE.**

**I UNDERTAKE TO INFORM THE SCHOOL OF ANY CHANGE IN THIS CIRCUMSTANCE, WHICH MIGHT PROHIBIT MY TRANSPORTING PUPILS.**

Signed: ..... Date: .....

Name: (please print) .....

**IMPORTANT**

**ALL staff and volunteers (including parents) who will be driving pupils on school business and activities MUST sign and return**

**Please supply the following information:**

MOT renewal date

Insurance renewal date

Tax renewal date

For Office use only

Checked by:

Name .....

Position .....

Date .....

**READING BOROUGH COUNCIL EDUCATION DEPARTMENT**  
**Parental Consent Form for Off-site and Hazardous Activities for the year**  
**Commencing 201.....**

**OHA 2**

If you wish your child to join in the year's activities, complete, sign and return the form.

The school will send you information about each trip or activity before it takes place.

You can, if you wish, tell the school that you do not want your child to take part in any particular school trip or activity.

School:	
Pupil's name:	Date of Birth:
Home address:	
Tel.no. inc. std.code:	NHS number:
How could you be contacted in an emergency?	
Is your child receiving medical treatment at present? If so please give details:	
Please give details of any medical conditions that might affect your child's performance or safety on this activity:	
Please give your family doctor's name and address:	
Please add any further information on a separate sheet as necessary.	

**READING BOROUGH COUNCIL EDUCATION DEPARTMENT  
EVALUATION FORM FOR RESIDENTIAL VISITS**

Evaluation of the visit to be completed by the group leader after the visit has taken place.

<b>School/Group:</b>			
<b>Group Leader:</b>			
<b>Number in Group:</b>	Boys:	Girls:	Staff:
<b>Age Range:</b>			
<b>Date(s) of Visit:</b>			
<b>Purpose(s) of Visit:</b>			
<b>Venue:</b>			
<b>Commercial Organisation:</b>			

**Please comment on the following features**

	Rating out of 10	Comment
<b>1. The centre's pre-visit organisation:</b>		
<b>2. Travel arrangements:</b>		
<b>3. Content of education programme provided:</b>		
<b>4. Instruction:</b>	Rating out of 10	Comment

# 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.

## Reading Borough Council Emergency Contact

**0118 9373737**

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		

If the visit will be outside normal establishment hours:

Establishment 'Home' Contact		
Head of Establishment / 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 Reading Borough Council 0118 9373737 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		

# Contacts

<b>EVOLVE</b>	<a href="https://evolve.edufocus.co.uk">https://evolve.edufocus.co.uk</a>
<b>Corporate Health &amp; Safety</b>	0118 9374534 <a href="mailto:Corporate.Health&amp;Safety@reading.gov.uk">Corporate.Health&amp;Safety@reading.gov.uk</a>
<b>Insurance Officer</b>	Derek Crisp 0118 9372745 <a href="mailto:Derek.crisp@reading.gov.uk">Derek.crisp@reading.gov.uk</a>
<b>LA Emergency Contact (24 hour)</b>	Reading Borough Council 0118 9373737

<b>National Guidance</b>	<a href="http://www.oeapng.info">www.oeapng.info</a>
<b>National Library</b>	<a href="http://www.national-library.info">www.national-library.info</a>
<b>LOtC</b>	<a href="http://www.lotc.org.uk">www.lotc.org.uk</a>
<b>LOtC Quality Badge</b>	<a href="http://www.lotcqualitybadge.org.uk">www.lotcqualitybadge.org.uk</a>
<b>Outdoor Education Advisers' Panel</b>	<a href="http://www.oeap.info">www.oeap.info</a>