



**TRAFFORD  
COUNCIL**

# **Guidelines for Off-Site and Educational Visits**

**with**

**National Guidance & EVOLVE**

**September 2021**



# Foreword

## High Quality Off-site and Educational Visits

Off – Site and Educational Visits play a significant part in the development of children and young people, adding to many aspects of the curriculum through the Learning Outside the Classroom agenda and broadening their experiences.

Trafford Council (the LA) fully supports and encourages all visits that are correctly planned, managed, and conducted.

We believe that all Local Authority establishments should strive for ‘**High Quality Off–site and Educational Visits**’, and in doing so maximise the benefits to those young people taking part.

This document aims to provide clear and unambiguous guidance for organising Off-site and Educational Visits.

It contains advice and procedures for Trafford Council establishments, and links with the DfE publication [Health and Safety on Educational Visits - Updated 26 November 2018](#) and [DfE - Health and Safety Responsibilities and Duties for Schools - Updated 26 November 2018](#).

It also links with the HSE document [School trips and outdoor learning activities - Tackling the health and safety myths](#) published in June 2011.

It also makes use of the ‘[National Guidance](#)’ website of the [Outdoor Education Advisers’ Panel](#) as the main source of ‘industry standard’ advice and information.

Rather than repeating much of these documents cross-references and hyperlinks are used throughout this publication.

The LA places great emphasis on ‘competence’.

The competence of the Visit Leader is the single most important factor in ensuring the safety of participants involved in Off-site and Educational Visits.

As such, the competence of the Head of Establishment and Educational Visits Coordinator to accurately assess the competence of the Visit Leader is crucial.

The LA expects establishments to make accurate professional judgements regarding competence and encourages establishments to seek further advice from the Local Authority if necessary.

The guidance is aimed at all Local Authority establishments.

Trafford Council is keen to promote a broad and balanced curriculum, which includes residential and off-site visits.

It is hoped that this document will provide more opportunities for learning situations outside the classroom and outside formal education.

**This document is updated regularly to reflect changes in legislation or best practice.**

**The latest version of this document is always available on EVOLVE at [www.traffordvisits.org](http://www.traffordvisits.org)**

**Please ensure that you are using the latest version**

# Off-site visits during Covid 19 / Coronavirus

Trafford Schools, Colleges and other Educational Establishments are expected to follow the guidance of the Local Authority, Public Health England and the UK Government during the Covid 19 / Coronavirus pandemic.

The information on the following pages is taken from The Outdoor Education Advisers' Panel National Guidance Website which is adopted by Trafford Council to supplement this LA document.

## Government Guidance

It is essential that current government guidance is followed.

It should therefore be monitored for any changes.

If you are planning a visit to a different country in the UK (England, Wales, Scotland or Northern Ireland) **when allowed**, you should check current government guidance for that country, as well as for your own country.

The latest government advice and information about Coronavirus is available at:

<https://www.gov.uk/coronavirus> (England);

<https://gov.wales/coronavirus> (Wales);

<https://www.gov.scot/collections/coronavirus-covid-19-guidance/> (Scotland);

<https://www.nidirect.gov.uk/campaigns/coronavirus-covid-19> (Northern Ireland).

**For England The Department for Education (DfE)** has issued a range of guidance for teachers, school leaders, carers, parents and students, at: <https://www.gov.uk/coronavirus/education-and-childcare>

This includes guidance for schools, at: <https://www.gov.uk/government/publications/actions-for-schools-during-the-coronavirus-outbreak>

and for Further Education providers including sixth-form colleges, at:

<https://www.gov.uk/government/publications/coronavirus-covid-19-maintaining-further-education-provision>

and for providers of community activities, holiday or after-school clubs and other out-of-school settings, at: <https://www.gov.uk/government/publications/protective-measures-for-holiday-or-after-school-clubs-and-other-out-of-school-settings-for-children-during-the-coronavirus-covid-19-outbreak>

These advise against all educational visits during the **current** national lockdown 2021.

However, there are good reasons why you should encourage learning outside as much as possible, and some off-site activities may be acceptable – see the section on “Planning and Managing Outdoor Learning” below.

DfE refers youth work settings to the National Youth Agency guidance (see below).

## Other Guidance

For England The National Youth Agency has issued guidance for managing youth sector activities and spaces during COVID-19, at <https://nya.org.uk/guidance/>.

This includes guidance on outdoor learning including camping and other residential experiences, and travel,



## **The Importance of Outdoor Learning during the Pandemic**

Learning outdoors has many educational and health benefits in normal times.

In addition, during the pandemic:

- The risk of infection is reduced outdoors;
- 'Social distancing' is often easier to maintain outside;
- Being outdoors in natural settings has a positive impact on mental health and well-being.

Establishments should therefore consider how they can maximise the amount of time that children and young people spend outdoors.

### **Planning and Managing Outdoor Learning**

In addition to using their own playgrounds and gardens, many schools routinely use outdoor areas adjacent to and nearby the school for educational activities, sometimes designated as a 'Local Learning Area'.

It should be possible to continue to use many of these venues within current limitations, especially if they are within walking distance of the establishment.

It might also be possible to negotiate temporary exclusive use of an outdoor area close to an establishment, with the landowner.

### **Planning and Managing Off-Site Visits (as and when current restrictions are lifted – 2021)**

When planning a visit, you should take the current government guidance into account as part of your process of risk assessment, and then check it regularly in the days and weeks leading up to the visit, and during a residential visit, and make any changes necessary to your plans.

You should have contingency plans in case of changes to government guidance or, for example, staff becoming unavailable because of a requirement to self-isolate.

You should consider the ability of participants to comply with COVID safety measures at the venue.

Parents and participants may naturally be concerned, so you should discuss their concerns with them and keep them informed about the situation and how you plan to mitigate any risks.

If you are planning a visit which involves another group (perhaps a group overseas), such as an exchange visit, or if you are planning to host or work with another group (perhaps an overseas group visiting the UK), you should keep in contact with them and be aware that they might need to change or cancel the arrangement.

If you plan to visit a venue such as a museum or gallery, or to attend a public event such as a concert or sporting fixture, or to stay in accommodation such as a hostel or hotel, or if you are using a tour operator or activity provider, discuss the potential effects of COVID-19 with them at the time of booking, and keep in touch with them during the run-up to the visit.

You should check that any provider you intend to use has assessed the risk of coronavirus and implemented control measures to prevent infection.

Some providers may not have had the benefit of the advice and support available to education establishments, and so may not be fully aware of the measures that are expected.

You should consider making a preliminary visit to check the measures in place and to discuss any issues with the provider.

## **Travel (as and when current restrictions are lifted – 2021)**

In normal times, using public transport for a visit has many benefits.

However, the government currently advises that public transport should be avoided if possible.

Where walking or cycling is not possible, dedicated transport (such as a minibus or coach) should therefore be used.

The principles and procedures for using dedicated transport should align as far as possible with those used in the school or other setting.

You should consider:

- how participants are grouped together on transport - where possible this should reflect the groupings (e.g. 'bubbles') used in the school or other setting;
- the use of hand sanitiser when getting on and off transport;
- additional cleaning of vehicles;
- ensuring that boarding and disembarkation are organised;
- distancing on transport where possible;
- the use of face coverings.

**A more detailed document can be downloaded from the OEAP National Guidance website at <https://oeapng.info/downloads/download-info/4-4k-coronavirus/>**

**This document is constantly under review.**

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## Forms

<b>Provider Form (OE2)</b>	For providers of adventurous, residential or overseas activities
<b>Provider Form (OE4)</b>	For providers of non-adventurous day activities
<b>Form (OE3)</b>	When using Campsites and Bunkhouses
<b>RA Form OE6</b>	Risk Assessment Proforma
<b>Private Car Use</b>	Use of a private car to transport young people
<b>Emergency Card (Leader)</b>	Emergency Card (Visit Leader)
<b>Emergency Card (Home Contacts)</b>	Emergency Card (Home Contacts)

## Contacts

# 1 General

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

Trafford 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, and with EVOLVE+ on-line parental consent, etc. EVOLVE: [www.traffordvisits.org](http://www.traffordvisits.org)

# 2 Responsibilities

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

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 SEND Schools, Voluntary Controlled Schools, Maintained Nursery Schools, Pupil Referral Units, and Statutory Youth Groups, the employer is the Local Authority. These establishments must adhere to this guidance document.

- For 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.

**IMPORTANT NOTE** for Voluntary Aided, Foundation and subscribing Academies and Independent schools:

- If you chose to adopt this guidance document please note that where it is stated that Local Authority approval required, this should be taken to read as either Governing Body or Head of Establishment approval being required. The scheme of delegation should be agreed by the Governing Body.
- The LA is available to provide advice and guidance on all visits and if further support is needed on a particular visit, the EVC should either contact the LA by submitting a note on the visit form or make contact with the LA representative whose details are available at the end of this document.

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.

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 Recording Visits & Local Learning Area

LA maintained schools are required to record, approve and evaluate ALL VISITS via EVOLVE, as this reduces bureaucracy, ensures that a robust audit trail exists, and evidences learning outcomes.

VA, Trust, Foundation and Academy schools can decide on which visits are entered onto EVOLVE but are advised to follow the same protocol as LA Maintained schools to use EVOLVE as a 'one stop shop' for Educational Visits.

#### **Recording Residential visits on EVOLVE**

The advice given to Trafford schools for the recording of Residential Visits on the EVOLVE system to set up an Audit Trail of booking dates, financial activity and Insurance requests is as follows:-

**A draft form should be started on EVOLVE on the date that contracts are signed / deposits are made with the External Provider.**

This can be done by adding copies of e-mails / letters to the attachment section under the finance section when received and therefore date stamped by the system.

At this stage the form needs only details of the venue, dates of the event and whether Trafford EVI insurance will be required.

The form will then sit in draft awaiting further information as it is planned.

This means the form can be added to as required.



**Once a form is deemed as complete it is requested to be authorised by the Head and therefore sent to the OEA a minimum of 20 days prior to the event taking place to allow for any queries by the OEA.**

**At this stage the form will be approved by the OEA.**

Once approved certain sections, such as pupil numbers, dates or accompanying staff, can still be amended and attachments added.

These sections will have a  symbol next to the section in EVOLVE Visit Form View

**However if there are major changes, such as a change of visit leader, venue, or transport company, the form can only be amended by requesting it being returned to draft using the recall button.**

Amendments can then be made and the approval process restarted.

**This means that if a claim is made against insurance, for whatever reason, the EVOLVE audit trail can be used in evidence for the claim.**

### **Recording of visits within an Establishments Local Learning Area from 15/2/21 - Updated 20/9/21**

In August 2019, as a way of formalising the ability of a school or other educational establishment to utilise their local area for what was previously termed ‘ad hoc’ or ‘spontaneous’ off-site visits, the LA promoted the concept of **Local Learning Areas** for Trafford establishments.

A Local Learning area refers to a designated geographical area where Local Area Visits and activities can take place as part of the normal curriculum and within the normal school day. The area designated should be within comfortable **walking** distance to and from the school and **will not require transport of any kind**.

Activities undertaken on **Local Area Activities** cannot be recurring activities or events organised by a Third Party. This type of activity require an EVOLVE visit form completing.

They also cannot be classed as adventurous so, for example, walking to a local park to undertake Forest School and this would require an EVOLVE Visit form completing.

Pupil’s age and ability will need to be taken into account when designating the area to be used.

Schools and other educational establishments can designate a Local Learning Area by adapting the template document, which is in the Resource Section on EVOLVE, and adding this to their current Visits Policy.

The visits / activities undertaken should follow the Standard Operating Procedures set out through the Local Learning Area document and Visits Policy and should not normally need additional Risk Assessments or notes added.

Specific consent would not normally be required for this type of activity as it takes place during the normal school day and would be covered in any termly / yearly consent already collected by the establishment

As of **15/02/2021** these activities can now be recorded on EVOLVE by choosing the LOCAL AREA ACTIVITY tab when adding the visit.

This will open a shortened version of an EVOLVE VISIT FORM containing relevant information of:-

VISIT NAME  
DATE OF VISIT  
TIME OF DEPARTURE / TIME OF RETURN

WHERE THE VISIT IS GOING

VISIT LEADER

NUMBER OF STUDENTS ATTENDING

ADDITIONAL COMMENTS AND INFORMATION

There are also optional extras, such as adding a REGISTER of students, where an establishment has activated this module.

Forms are designed to be filled in on the day of the event and should not be completed too far in advance to allow for last minute changes.

Forms are requested to follow the protocol of entering Visit Names in Capitals as requested on the input page.

Full details of the destination should be entered into the Visit Name to clarify where the visit is going. For example the full visit name could be Y4 - LOCAL WALK - GEOGRAPHY - BLUEBELL WOODS.

Visit names are initially limited on first entry but can be amended from the left hand list in edit mode.

This helps scan reading of the LA Global diary especially at peak times.

This removes the need of using a paper LAA RECORDING SHEET as requested previously and also means such visits should now not be added to EVOLVE as a VISIT, using the category of a 'none of the above' activity, as in the past.

Each individual establishment will have the option to 'automatically approve' such activities as they are covered within the Local Learning Area Policy or 'require specific approval' such as the EVC. This option can be adjusted within the System Control Panel.

The LAA module is fully integrated into the EVOLVEGo Mobile app with details of which can be found in the HELP section of EVOLVE.

The Help section on EVOLVE will provide training videos for this and other EVOLVE options.

The LA Outdoor Education Adviser is available to answer any questions as required or provide training as appropriate.

See **'Local Learning Area Policy template'** in EVOLVE Resources.

## 5 Approval of Visits

Final approval is delegated to the Headteacher for all visits, with the exception of:

- Overseas visits
- Residential visits
- Adventurous activity visits

which for LA Maintained Schools require Local Authority approval. These visits should be submitted to the LA at least 20 days 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 LA' mean?

When the Headteacher authorises a visit on EVOLVE, he/she confirms that the visit complies with school and Local Authority 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 Local Authority does not have first-hand knowledge of the intended participants or the competence of the staff team to make this decision.

The LA 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, level of maturity of pupils, including those with special needs
- The intended learning outcomes
- The proposed itinerary
- The contingency plans (Plan B) in place

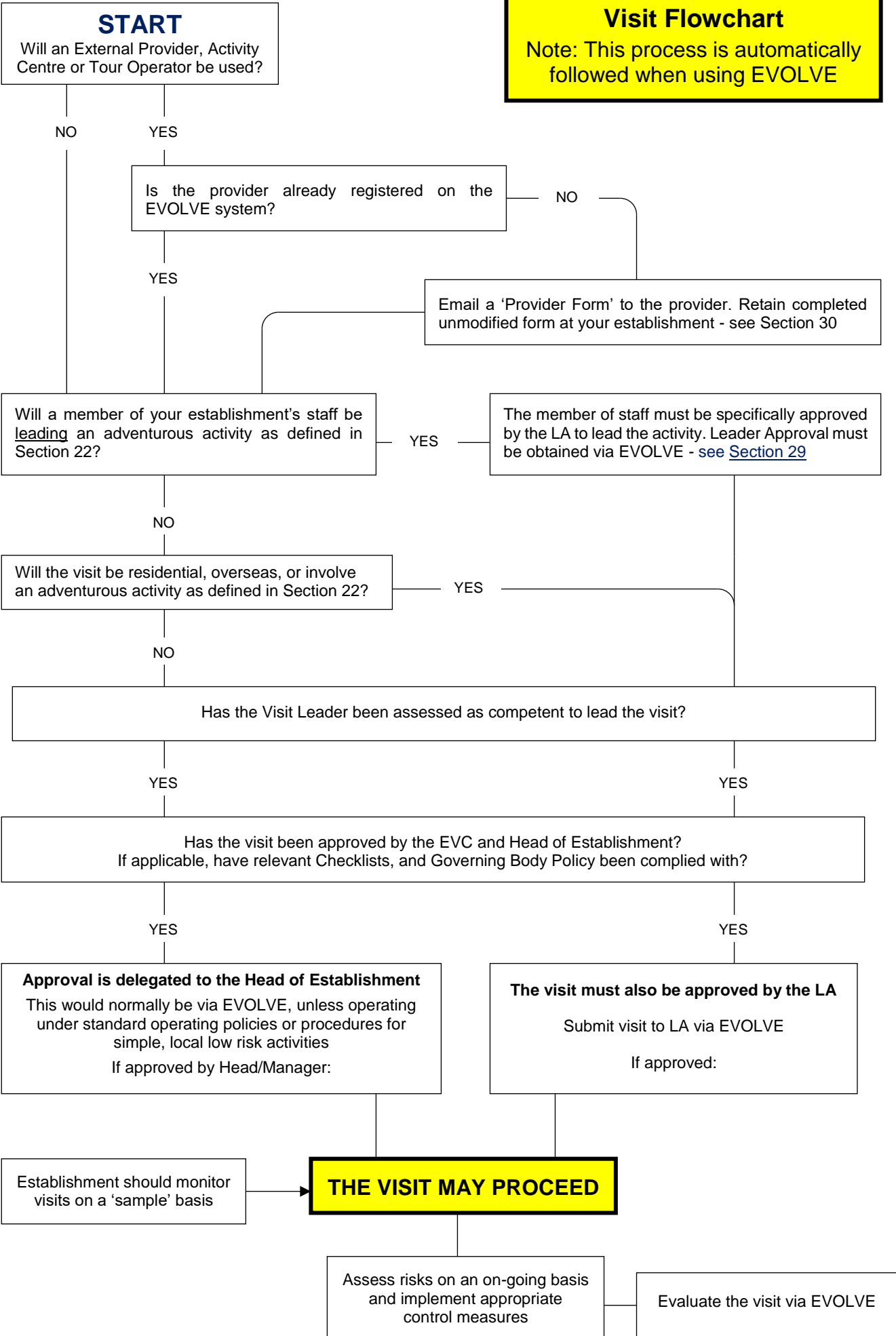
The Local Authority works on the basis that the Headteacher should not submit the visit for LA approval if he/she is not satisfied with the intended arrangements. 'Approved by LA' therefore confirms that the school appears to have followed the Local Authority's stated procedures.

Although all visits requiring Employer approval are viewed, it is not feasible for the LA 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 technical expertise to assess the competence of the activity leader, and therefore this task is carried out by the Local Authority.

Refer to National Guidance 1b *Foundations*

**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:

- **R**elationships
- **E**mootional & spiritual
- **C**ross curricular
- **I**ndividual
- **T**eamwork
- **E**nvironmental

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

Refer to: '[Evaluation](http://www.oeapng.info)' 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. 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.

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



## 8 Planning and Risk Management

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.

- 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

### 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.

The Department for Education has prepared a 'one-off' consent form which schools can ask parents to sign when a child enrolls at the school. This will cover a child's participation in any of these types of activities throughout their time at the school. These include adventure activities, off-site sporting fixtures outside the school day, residential visits and all off-site activities for nursery schools which take place at any time (including during school holidays or at the weekend). Alternatively, schools may devise their own consent form.

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

### Other establishments:

Annual consent is appropriate for regular routine activities.

For all other visits, consent should be obtained on an individual visit basis. Information provided to parents prior to granting consent should include full details of the activities and any other significant information.

**All:** 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 Legal 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' 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

## 14 Insurance

Advice regarding insurance may be sought from the Local Authority's Insurance section. Contact: Risk and Insurance Manager 912 4388

In addition to the standard Public Liability cover provided by the Borough, which all establishments who participate in payment of the premiums will benefit from, the Council has taken out annual 'blanket' personal Educational Visits insurance for all school trips/visits at home or abroad for all schools who participate in the Borough's annual premium charge.

**This cover is activated by requesting insurance on EVOLVE.**

Schools offering adventurous '**onsite enrichment**' activities, such as Forest Schools activities, should be aware that EVI insurance is not applicable and choose 'Onsite Activity - EV insurance not applicable' on EVOLVE.

For those establishments who make their own insurance arrangements for personal accident / travel insurance they must ensure that the cover provided and policy limits are equivalent to, or better than, the LA Insurance scheme.

Where travel insurance is required, suitable insurance must be in effect before the trip departs. For all other visits it is the responsibility of the Governing Body (if applicable), Head of establishment, and Educational Visits Coordinator to determine whether additional insurance should be put in place...

The establishment should particularly consider the need for additional insurance for residential activities, or those involving adventurous activities or hazardous environments.

**Pre Brexit** for travel within the European Union it was recommended that all participants hold a valid **EHIC (European Health Insurance Card)**.

**Post Brexit** - current **European Health Insurance Cards (EHIC)** are valid as long as they are in date and people can continue to use these when travelling to the EU.

The UK Government has launched a new **Global Health Insurance Card (GHIC)** will gradually replace existing **European Health Insurance Cards (EHIC)**

Application for the GHIC can be done when a current EHIC expires or a EHIC card was not held

The card will give access to reduced-cost or free medical treatment from state healthcare providers, however each country's healthcare system is slightly different.

Therefore, a GHIC might not cover everything that would be free on the NHS.



Refer to: '[Insurance](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info) & <https://www.gov.uk/government/news/uk-launches-global-health-insurance-card>

## 15 Transport

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

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)

Trafford Maintained establishments should refer, in the first instance, to 'Safe Transport Policy, CYPS, April 2007' and the subsequent update detailed in the letter to all establishments dated 30 November 2007 in the EVOLVE Resource centre

The following general information is taken from this document.

Parents must be made aware of the intended form of transport, and their consent obtained.

### 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 it is advised that a '[PRIVATE CAR](#)' Form be completed and retained by the establishment (on an annual basis).

### MINIBUSES

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

For further information, see also:

- Refer to OEAP document: [Transport in Minibuses](#)
- DVLA [www.dvla.gov.uk](http://www.dvla.gov.uk) Select 'Online leaflets', INF28 'Driving a minibus'
- ROSPA '[Minibus Safety: A Code of Practice](#)' 2008
- MiDAS (Minibus Driver Awareness Scheme) via [Community Transport Association UK](#). This also contains information on PCV licences, weight limits and towing.

In summary, all drivers of minibuses should undertake recognised Minibus training and keep that training current. This applies to pre & post 1997 licence holders operating under the section 19 permit scheme as 'volunteer drivers'.

**Post 1997** licence holders may drive a minibus provided:

- Drivers are aged 21 years or over.
- They have held their category B driving licence for at least two years.
- The minibus is being used by a non-commercial body for social purposes, but not for hire or reward.
- Drivers are not being paid to drive the minibus, other than out-of-pocket expenses.
- The minibus does not exceed 3.5 tonnes (or 4.25 tonnes if specialised equipment for the carriage of disabled passengers is included) gross vehicle weight.
- No trailer is towed.
- If any of the above provisions are not met, then a full D1 PCV is required.

### 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.

## 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 23** applies.

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

As with all visits, where appropriate there should be an approved alternative 'Plan B' that could be used where conditions dictate, and for which parental consent 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)

EVOLVE: [www.traffordvisits.org](http://www.traffordvisits.org)

## 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.

**Following the withdrawal of the United Kingdom from the European Union** Government advice on travel to Europe from 1st January 2021 is at <https://www.gov.uk/visit-europe-1-january-2021>

**The Department for Education has also published guidance to schools for visits to Europe after 1st January 2021.**

**See the section on “school trips and exchanges” in** <https://www.gov.uk/government/collections/guidance-for-schools-during-the-transition-period-and-after-1-january-2021>

**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)

Please see also the information in the **[Insurance section](#)** of this guidance with regard the UK **Global Health Insurance Card (GHIC)** which will gradually replace existing **European Health Insurance Cards (EHIC)**

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

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' 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, i.e. is it a planned activity?

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

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' 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
- Ice Skating
- Sailing / windsurfing / kite surfing / SUP
- 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
- Trampoline Parks
- Orienteering
- Forest Schools / Bushcraft
- Coasteering/coastal scrambling/sea level traversing
- Underground exploration
- Shooting / archery / paintballing / laser quest
- Snowsports (skiing, snowboarding, and related activities), including dry and Indoor 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 24](#)

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
- Farm visits
- Local traffic survey
- Museum, library, etc.
- Physical Education and sports fixtures (other than the above)
- Water-margin activities as defined in [Section 16](#)

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 24

Open country activities - Section 25

Snowsports - Section 26

Overseas expeditions - Section 27

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 and 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 and 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 and 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 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.  
- Hill and Moorland Award / 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 Lowland Expedition Leadership (LEL).  
See <https://www.sportsleaders.org/qualifications-programmes/expedition-leadership>
- Lowland Leader Award See [www.mltuk.org](http://www.mltuk.org)
- 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 (i.e. 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.Snowsportsotland.org](http://www.Snowsportsotland.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.Snowsportsotland.org](http://www.Snowsportsotland.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 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, 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 <https://www.rgs.org/>

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

## 28 Emergency Procedures

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

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

For visits that take place outside normal establishment hours:

- 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: '[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 (i.e. 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 28 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)  
**and**
  - 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 New Providers that are not already registered on EVOLVE

### 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 (i.e. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and must be complied with, see Section 27

## 31 Procedures for Individual Placements

Recently multi – agency teams have started to use External Providers for Individual placements of young people, as part of a development programme, where the young person is not accompanied by a member of staff.

To enable a suitable and sufficient system to be put in place the LA has provided the following supplementary guidance to be found in the EVOLVE Resource centre:-

**'Notification and approval system for Unaccompanied Individual Placements using Outdoor and Adventurous Activities, May 2007'**

**'Notification and Approval for Unaccompanied Individual Placements' or**

**'Referrals to External Agencies on Non-Adventurous or Outdoor Activities, Sept 07'**

These documents are available from the establishment's EVC or download via EVOLVE.

All such activities have to be recorded on the EVOLVE on line system.

## 32 Trampoline Parks

The Association for Physical Education (AfPE)'s view is that trampolining is suitable for teaching in secondary schools only. It is seen as one of the higher risk activities, and as such, those teaching it must have undertaken specific trampolining qualifications. AfPE currently recommends that schools do not arrange visits for pupils to Trampoline Parks.

There is currently no robust inspection/accreditation system in place for the supervision of Trampoline Parks, and until such time as this exists, schools should fully consider the National Guidance document 6n Visiting trampoline parks

**Establishments should contact the LA to discuss the use of such venues prior to booking.**

If permission is given 'Trampolining at Trampoline Parks' is classed as an adventurous activity and should therefore be entered on EVOLVE.

Please note that the above does not apply to trampoline clubs or centres which are registered with British Gymnastics. These activities are still classed as 'adventurous', and schools intending to visit these facilities should comply with current AfPE guidance.

## 33 Charging

The Education Act 1996, sections 449-462 sets out the law on charging for school activities in England. The Department for Education provides guidance to Heads of Establishments and Governing Bodies as to the requirements of a charging & remissions policy, voluntary contributions and what can or cannot be charged for.

Trafford Council Heads / Managers, Curriculum Planners, EVCs and Visit / Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to National Guidance document: 3.2c Charging for School Activities

DfE document: Charging for School Activities



## 34 Waivers & Disclaimers

Schools must not undertake any activity where the provider asks for a liability waiver to be signed (either by school staff or by parents) before participation.

The Association for Physical Education, School Sport and Physical Activity (AfPE) says *'Schools need to be aware that they cannot sign waivers/disclaimers on behalf of pupils, neither can they ask parents to sign waivers for children whilst they are under the schools duty of care. AfPE currently does not recommend that schools arrange visits for pupils if the provider insists on the completion of a waiver/ disclaimer'*.

Legal advice is that 'Teachers/school staff should not sign disclaimers of this nature as they have no authority to do so from parents. Even if a parent gave their specific authority in respect of their children or signed the disclaimer themselves, it would be of no effect with regard to the liabilities and obligations of the teacher/school. Neither could a teacher purport to sign the disclaimer on behalf of the school governors or the Local Authority as they have no authority to do so from the governors or the Local Authority'.



# Educational Visits Checklist

This checklist is a useful tool to aid planning and is applicable for **all** visits.

**The visit should only go ahead if the answer to all applicable questions is 'YES'**

## In advance of the visit:

1. Have the educational aims of the visit been clearly identified?  yes
2. Is the visit appropriate to the age, ability and aptitude of the group?  yes
3. Has there been suitable progression/preparation for participants prior to the visit?  yes
4. Does the visit comply with any guidelines specific to your Establishment?  yes
5. Does the visit comply with any specific LA guidelines? (see relevant sections)  yes
6. If a member of staff is going to lead an adventurous activity, have they been 'approved' by the LA?  yes  n/a
7. If using an external provider or tour operator, has the provider satisfactorily completed and returned a 'Provider Form'?  yes  n/a
8. Are transport arrangements suitable and satisfactory?  yes  n/a
9. If the visit is residential, have appropriate measure been taken to ensure the suitability of accommodation?  yes  n/a
10. If the visit is overseas, have appropriate additional measures been taken to ensure the suitability of activity and safety of participants?  yes  n/a
11. Have you conducted a pre-visit? (normal procedure for most visits within the UK). If not, have appropriate additional checks been made?  yes
12. Do the adults in the party have the appropriate skills for the visit? (Check this carefully and arrange suitable training and/or briefing to clarify your expectations).  yes
13. Have any adult helpers (non LA employees) been approved by the Head of Establishment as to their suitability?  yes  n/a
14. Is the level of staffing sufficient for there to be an appropriate level of supervision at all times?  yes
15. Does the Visit Leader possess the necessary competence to lead the visit, and is he/she comfortable with their role?  yes
16. Are all support staff aware of and comfortable with their roles?  yes
17. Are all helpers aware of and comfortable with their roles?  yes
18. Has Event Specific Risk Assessment (OE6) been carried out and will this be shared with all relevant parties?  yes
19. Is insurance cover adequate?  yes
20. Does at least one member of staff know the participants that are being taken away, including any behavioural traits?  yes

21. Have participants been advised in advance about expectations for their behaviour? If appropriate, are participants aware of any 'rules', and have sanctions to curb unacceptable behaviour been identified and agreed with participants and staff?  yes
22. Are participants aware of the nature and purpose of the visit?  yes
23. Are parents fully aware of the nature (including contingency plans), and purpose of the visit, and has consent been obtained?  yes
24. Have all relevant details been issued? (Eg. itinerary, kit lists, etc?)  yes  n/a
25. Are staff aware of any medical needs and/or other relevant details of participants?  yes
26. Has parental consent been gained for staff to administer specific drugs/injections, and if necessary have named staff received appropriate training?  yes  n/a
27. Are staff aware of any relevant medical conditions of other staff/helpers within the group?  yes  n/a
28. Does at least one responsible adult have a 'good working knowledge' of First Aid appropriate to the environment?  yes
29. Is a first aid kit (appropriate to the visit) available?  yes
30. Is there flexibility within the programme? Are there contingency plans that would be suitable in the event of changed or changing conditions, staff illness, etc. eg. 'Plan B', and have these plans been risk assessed and parental consent been obtained?  yes
31. For journeys taking place outside the establishment's 'normal' hours, will the Emergency Contacts Form be carried by the Visit Leader, and Home Contacts Form with the designated emergency contact/s?  yes  n/a
32. Are full details of the visit at the LA establishment, and if appropriate with the establishment's Emergency Contact(s)?  yes
33. Are staff aware of the appropriate action to be taken in the event of accident, incident or emergency?  yes
34. Is a weather forecast and/or other local information necessary, and are staff able to access this information and act upon it appropriately if necessary?  yes  n/a
35. If undertaking water-margin activities, has a copy of 'Group Safety at Water-Margins' been made available to all supervising staff in advance of the visit?  yes  n/a
36. A mobile phone is recommended for all visits. Are you aware of the reception in the area you are visiting?  yes  n/a
37. Will the group need waterproof clothing, boots or other equipment? If so, are procedures in place for checking the suitability of equipment?  yes  n/a
38. Does any specialist equipment conform to the standards recommended by responsible agencies?  yes  n/a
39. Have all financial matters been dealt with appropriately?  yes
40. Has the visit been approved by the Head of Establishment and EVC, and in line with Governing Body policy (where appropriate)?  yes
41. If residential, overseas or involving adventurous activities, has the visit been approved by the LA ?  yes  n/a

### During the visit

42. Do all staff have a list of participants/groups? + emergency contact details and an 'Emergency Card – Visit Leader' if out of the establishment's normal hours?  yes
43. Does the establishment office have a list of the names of all participants, including adults and contact details? If out of normal hours, does the designated home contact have an 'Emergency Card – Home Contacts'?  yes
44. Do staff have sufficient funds to allow for any contingencies?  yes  n/a
45. Do staff have any relevant literature, work sheets, clipboards, etc?  yes  n/a
46. Do staff have other items, eg. First aid kit, + sick bags, litter sack, etc., if needed?  yes
47. Are participant numbers being checked at appropriate times?  yes
48. Has the group been warned of potential hazards in advance? If necessary, have specific arrangements been made to supervise these areas particularly carefully?  yes  n/a
49. Are participants aware of the procedure in areas where there is traffic? (eg. if walking, is it pairs, crocodile, groups? - may participants run? - are participants aware of the procedure at road crossings? etc.)  yes  n/a
50. Has a clear recall system been arranged if the group is working away from you? Do participants understand this and will they be able to respond effectively?  yes  n/a
51. If a rendezvous for the group has been arranged after a period of time, does each participant and member of staff know exactly where and when to meet?  yes  n/a
52. Do participants know what action they should take if they become separated from the group?  yes
53. Is on-going risk assessment being conducted, and if necessary the programme adapted to suit changed or changing circumstances (Plan B)?  yes

### At the end of the visit

54. Are appropriate arrangements in force for the dismissal of participants?  yes
55. Has the Visit Leader reported back to the Educational Visits Coordinator?  yes  n/a
56. Has the group been debriefed and any relevant follow-up work completed?  yes  n/a
57. Have all loose ends been tied up, eg. paperwork, finance, thank you letters, etc?  yes
58. Has the visit been evaluated, and if appropriate have notes been made of points to be considered for future visits? Evaluation can be completed via EVOLVE  yes
59. Have all staff and helpers involved in the visit been thanked for their input?  yes

**FOR COMPLETION BY PROVIDERS AND TOUR OPERATORS OF OUTDOOR EDUCATION, OVERSEAS AND RESIDENTIAL VISITS TO CFW ESTABLISHMENTS AND PROJECTS**

When considering using a provider or tour operator to deliver Outdoor Education, Overseas or for a Residential visit CFW Establishments and Projects must seek written assurances that the provision complies with the Trafford 'Guidelines for Off-Site and Educational Visits'

**Satisfactory completion of this form and confirmation of the suitability of the provider from the LA must be obtained prior to contracts being signed or deposits paid**

CFW Establishment / Project		Leader in charge:	
Date(s) of visit:		Name of provider:	

**The provider or tour operator providing services as outlined above is asked to give careful consideration to the statements below and INITIAL in the space at the end of the STATEMENT that the standard of service provided will meet the conditions listed. Indicate by a cross any you cannot meet. Write N/A against any specifications which do not apply to your provision.**

**SECTION 1 – LOtC QUALITY BADGE AND ADVENTURE MARK**

Has your organisation applied for and been granted a 'Learning Outside the Classroom' Quality Badge or 'Adventure Mark' Badge?

If **YES** please indicate the date granted and any other relevant information in the space below

**Holders of these Quality badges only need to complete the contact information section at the end of this form.**

If **NO** please complete the next sections

**SECTION A – ALL VISITS**

Section A should be completed for all visits. Sections B (Outdoor Education), C (Tour Operators) and D (Overseas Expeditions) should be completed if applicable

**Public Liability Insurance**

The provider has Public Liability Insurance for at least £5 million with a clause giving "indemnity to principal" for the duration of the visit .

A copy of the Certificate of Insurance **MUST** be provided with this form.

**Data Protection**

Do you comply with the General Data Protection Regulations (GDPR)?

Will the terms of the contract with the establishment include an outline of how any personal data the establishment shares with you will be shared, used, stored, secured and eventually deleted or returned?

Do you accept that you may only take or use photographs of participants with the establishment's specific permission?

**Waivers**

Do you guarantee that the establishment, the participants or their parents will not be required to agree any waiver which seeks to limit your liability for death or personal injury resulting from your negligence?

**Health, Safety and Emergency procedures**

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 operating procedures are available for inspection

2. Accident and emergency procedures are maintained and records are available for inspection.



- 20. There is a clear definition of responsibilities between providers and visiting leaders regarding supervision and welfare of participants.
- 21. All equipment used in activities is suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary.
- 22. The provider will take all reasonable steps to allow inclusion and participation of any young people who have special needs or have a disability, following a risk assessment process, in line with the Special Educational Needs and Disability Act 2001.
- 23. The provider encourages responsible attitudes to the environment as an integral part of the programme.

**SECTION C – TOUR OPERATORS**

*Where a tour operator delivers services to Trafford Schools and Youth Service projects using other providers e.g. ski schools, 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 regulation which apply to the country of operation.*

- 24. Sections A and B of the form, as appropriate, have been completed to show that the checks have been made, records of which are available for inspection.
- 24. The Tour Operator complies with Travel Regulations, including bonding to safeguard customers' monies.
- 25. ATOL, ABTA or other bonding body name and numbers: \_\_\_\_\_

**SECTION D – OVERSEAS EXPEDITIONS**

- 26. Do you comply with British Standard BS8848:2014?
- 27. The provider has completed sections A and B of this form and agrees to provide additional written assurances which are specific to the expedition being proposed and which will be made clear to the provider by the Trafford Adviser for Outdoor Education and Educational Visits.

**CONTACT AND OTHER RELEVANT INFORMATION**

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

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

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Name in capitals: \_\_\_\_\_ Position in organisation: \_\_\_\_\_

Name and address of provider or tour operator: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Thank you for completing the form. Please return to the leader at the CFW Establishment or project named overleaf**

CFW Establishments and Projects should contact the Trafford Adviser for Outdoor Education and Educational Visits for advice on the information provided on the form.

Telephone: 0161 911 8651

E-mail [steve.berry@trafford.gov.uk](mailto:steve.berry@trafford.gov.uk)

**CHILDREN, FAMILIES AND WELL BEING  
FOR COMPLETION BY EXTERNAL PROVIDERS OF OFF - SITE AND EDUCATIONAL VISITS  
TO TRAFFORD CFW ESTABLISHMENTS AND PROJECTS – INDIVIDUAL AND GROUP**

When considering using a provider to deliver a **standard** Off Site or Educational Visit, Trafford CFW establishments and projects must seek written assurances that the provision complies with the Trafford Guidelines.

Providers of Adventurous, Overseas or Residential Activities should complete form OE2.

Where a third party is sub - contracted to provide Adventurous, Overseas or Residential Activities by the organising provider they should also complete form OE2.

**Satisfactory completion of this form and confirmation of the suitability of the provider from the LA must be obtained prior to contracts being signed or deposits paid.**

CFW Establishment / Project		Leader in charge:	
Date(s) of visit:		Name of provider:	

**The provider providing services as outlined above is asked to give careful consideration to the statements below and INITIAL in the space at the end of the STATEMENT that the standard of service provided will meet the conditions listed. Indicate by a cross any you cannot meet. Write N/A against any specifications which do not apply to your provision**

**LOtC QUALITY BADGE**

Has your organisation applied for and been granted a 'Learning Outside the Classroom' Quality Badge?

If **YES** please indicate the date granted and any other relevant information in the space below

**Holders of these Quality badges only need to complete the contact information section at the end of this form.**

If **NO** please complete the next sections

**INSURANCE**

The provider has Public Liability Insurance for at least £5 million with a clause giving "indemnity to principal" for the duration of the visit .

A copy of the Certificate of Insurance **MUST** be provided with this form.

**Data Protection**

Do you comply with the General Data Protection Regulations (GDPR)?

Will the terms of the contract with the establishment include an outline of how any personal data the establishment shares with you will be shared, used, stored, secured and eventually deleted or returned?

Do you accept that you may only take or use photographs of participants with the establishment's specific permission?

**Waivers**

Do you guarantee that the establishment, the participants or their parents will not be required to agree any waiver which seeks to limit your liability for death or personal injury resulting from your negligence?

**Health, Safety and Emergency procedures**

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 that are available for inspection
2. Accident and emergency procedures are maintained and records are available for inspection.

**Vehicles / Drivers**

- 4. All vehicles are roadworthy and meet the requirements of the relevant regulations in the country in which they are being used.
- 4. All drivers hold appropriate licences and have undertaken relevant driver training for the vehicles used.

**Staffing**

- 5. All reasonable steps are taken to check staff who have access to young people for relevant criminal history and suitability for work with young people.
- 6. There are adequate and regular opportunities for liaison between Trafford staff and the provider's staff and there is sufficient flexibility to make radical changes to the programme if necessary and the reasons for such changes will be made known to Trafford staff.

**Activity Management**

- 7. 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
- 8. The provider maintains a written code of practice for activities which is consistent with relevant National Governing Body guidelines.
- 9. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be undertaken or staff have had their competences confirmed by an appropriately experienced Technical Adviser.
- 10. Where there is no National Governing Body for the activity, operating procedures, staff training and assessments requirements are explained in the provider's code of practice.
- 11. Participants will at times have access to a person with a current first aid qualification. Staff are practiced and competent in accident and emergency procedures.

**Supervision**

- 12. There is a clear definition of responsibilities between providers and visiting leaders regarding supervision and welfare of participants.
- 13. Where the placement is for an individual young person an agreed policy is in place for contact with the CFW Establishment in case of emergency.

**Equipment**

- 14. All equipment used in activities is suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary.

**Inclusion**

- 15. The provider will take all reasonable steps to allow inclusion and participation of any young people who have special needs or have a disability, following a risk assessment process, in line with the Special Educational Needs and Disability Act 2001.

**Sustainability**

- 16. The provider encourages responsible attitudes to the environment as an integral part of the programme.

**Sub-contracting**

Will you sub-contract any services (e.g. activity instruction, transport, accommodation)?

Where any element of provision is subcontracted, do you ensure that each sub-contractor meets the relevant specifications outlined in the other sections of this form, and are records of checks of sub-contractors available for inspection?

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

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

**CONTACT DETAILS**

Name and address of provider or tour operator: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Name in capitals: \_\_\_\_\_ Position in organisation: \_\_\_\_\_

**Thank you for completing the form. Please return to the leader at the CFW Establishment or project named overleaf.**

CFW Establishments and Projects should contact the Trafford Adviser for Outdoor Education and Educational Visits for advice on the information provided on the form.

Telephone: 0161 911 8651

E-mail [steve.berry@trafford.gov.uk](mailto:steve.berry@trafford.gov.uk)



**TRAFFORD COUNCIL  
CHILDREN, FAMILIES AND WELL BEING**

**EDUCATIONAL USE OF COMMERCIAL CAMPSITES AND BUNKBARNS / BUNKHOUSES**

When considering using a commercial campsite, bunkbarn or bunkhouse for an off-site or educational visit CFW Establishments and Projects must seek written assurances that the provision complies with the Trafford 'Guidelines for Off-Site and Educational Visits'

Where a 'toilet & tap' site is to be used please refer to the above guidance document.

It is not feasible for Trafford Council to visit every commercial campsite, bunkbarn or bunkhouse likely to be used by CFW Establishments and Projects from Trafford and the following questions are directed at providers.

**Satisfactory completion of this form and confirmation of the suitability of the provider from the LEA must be obtained prior to contracts being signed or deposits paid**

School /Youth Service Project		Leader in charge:	
Date(s) of visit:		Name of provider:	

Those providing services as outlined above are asked to give careful consideration to the statements below and sign in the space at the end of the form that the standard of service provided will meet the conditions listed.

Indicate by a cross any you cannot meet.

Write N/A against any specifications which do not apply to your provision.

Space is also provided for details to be given of any licenses or approval schemes held by the campsite/ bunkbarn.

Certificates and documentation should be available for inspection on request.

**1) GENERAL INFORMATION**

The campsite / bunkbarn have a stated code of conduct for visiting groups that is provided in advance of any booking.

There is a resident warden on site.

If not, there are arrangements made for contacting them during the stay.

There is access to a telephone in an emergency.

The campsite / bunkbarn is accessible by coach.

**2) DOMESTIC ARRANGEMENTS**

Adequate shower, washing facilities and toilets are available.

A drying room is available.

Laundry facilities are available.

Dish washing facilities are available.

**3) FIRE PRECAUTIONS**

A current fire certificate covers indoor accommodation or advice has been sought from a fire officer and implemented and a fire risk assessment has been completed.

A system is in place to warn of fire and evacuation details are adequately posted.

**4) YOUNG PEOPLE WITH SPECIAL NEEDS**

The provider will take all reasonable steps to allow inclusion and participation of any young people who have special needs or have a disability, following a risk assessment process, in line with the Special Educational Needs and Disability Act 2001.

5) **PUBLIC LIABILITY INSURANCE**

The provider has public liability insurance for at least £5 million with a clause giving "indemnity to principal".  
A copy of the Certificate of Insurance to be attached. If not held please contact OEA

6) **CAMPSITE SPECIFIC QUESTIONS**

The campsite holds an operating license.

Where this is the case please attach details.

There is a specific area of the site for use by groups e.g. a separate group field.

There is a room available for use in bad weather.

There is a shop on site.

The campsite area is used for occupational reasons, e.g. a working farm.

Please outline this use.

7) **BUNKHOUSE / BUNKBARN SPECIFIC QUESTIONS**

The bunkhouse / bunkbarn holds an operating license.

Where this is the case please attach details.

There are appropriate security arrangements to prevent unauthorised persons entering the accommodation.

Separate male and female sleeping accommodation and washing facilities are provided and staff accommodation is close to the young people.

Bed linen is provided.

Adequate facilities are provided for self-catering.

It is possible for the group to have exclusive use of the accommodation during their stay.

There is a shop on site.

The bunkhouse area is used for occupational reasons, e.g. a working farm.

Please outline this use.

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

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Name in capitals: \_\_\_\_\_

Position in organisation: \_\_\_\_\_

Name and address of provider: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Thank you for completing the form. Please return to the leader at the school / youth service project named overleaf.**

CFW Establishments and Projects should contact the Trafford Adviser for Outdoor Education and Educational Visits for advice on the information provided on the form.

Telephone: 0161 911 8651

E-mail [steve.berry@trafford.gov.uk](mailto:steve.berry@trafford.gov.uk)



## TRAFFORD CHILDREN, FAMILIES AND WELLBEING

### GENERIC RISK ASSESSMENT

ESTABLISHMENT: ANY SCHOOL

ASSESSMENT DATE:

ACTIVITY / VENUE: URBAN FIELDWORK

COMPLETED BY:

ACTIVITY OBJECTIVES:

DATE REVIEWED:

<b>1. Hazard</b> <i>List significant hazards which may result in serious harm or affect several people</i>	<b>2. Risk</b> List possible risks associated with these hazards	<b>3. Who might be harmed?</b> List groups of people who are especially at risk from the hazards identified.	<b>4. Is the risk adequately controlled?</b> List existing control measures or note where the information may be found. (e.g. Information, instruction training, systems or procedures)	<b>5. What further action required?</b> List the risks which are not adequately controlled and proposed action where it is reasonably practical to do more
Transport to and from venue	Traffic Accident Vehicle fire	Children Helpers Staff	Organisers and leaders familiar with TMBC Visit guidelines. Use reputable coach company or minibuses in accordance with TMBC Safe Transport Policy. Police disclosure checks made for significant helpers	INFORMATION MAY BE REQUIRED FOR GROUP / SITE / ACTIVITY SPECIFIC RISK ASSESSMENT
Road traffic	Traffic Accident	Children Helpers Staff	Known area – subject to preliminary visit. Provide a detailed briefing on points of danger. Allocation of staff to known points of danger.	
Working Environment – group visibility	Individuals lost or separated	Children	Work in defined groups at all times. Closely defined working area. Designate meeting points.	
Incident / Emergency	Accident / Injury Illness	Children	All students carry emergency telephone contact number. Appropriate management and use of staff. Medical and behavioural conditions known to staff.	
Working Environment – public areas	Incidents involving members of the public	Children Staff Other Users	Known area – subject to preliminary visit Appropriate briefing of students on codes of behaviour. Defined roles and responsibilities for all staff.	
Weather extremes	Cold Heat Wet	Children Helpers Staff	All party to carry protective clothing – according to time of year and outlined in appropriate guidance	

This generic risk assessment is designed to prime consideration of a simplified Site/Activity/Group specific Risk Assessment carried out by the Educational establishment and attached to this form.



**RISK ASSESSMENT**

**ESTABLISHMENT:**

**ASSESSMENT DATE:**

**ACTIVITY / VENUE:**

**COMPLETED BY:**

**ACTIVITY OBJECTIVES:**

**DATE REVIEWED:**

<b>1. Hazard</b>  <i>List significant hazards which may result in serious harm or affect several people</i>	<b>2. Risk</b>  List possible risks associated with these hazards	<b>3. Who might be harmed?</b>  List groups of people who are especially at risk from the hazards identified.	<b>4. Is the risk adequately controlled?</b>  List existing control measures or note where the information may be found. (e.g. Information, instruction training, systems or procedures)	<b>5. What further action required?</b>  List the risks which are not adequately controlled and the proposed action where it is reasonably practical to do more

What is your review procedure



# Use of a private car to transport young people

<b>1</b>	To: The Head of _____ Establishment
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**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: _____ Print name: _____
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<b>3</b>	Address: _____ _____ _____ _____
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<b>4</b>	Date: _____
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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

	<b>Insurance cover required</b>
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.

**Trafford Council Emergency Contact 0161 912 1111  
or if abroad +44 161 912 1111**

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		
Trafford Council Emergency Contact	<b>0161 912 1111</b>	-

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 Trafford Council 0161 912 1111 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		
Trafford Council Emergency Contact	<b>0161 912 1111</b>	-

Chair of Governing Body (optional)		
Other/EVC		

# Contacts

<b>Outdoor Education Adviser</b>	Steve Berry 0161 911 8651 / 07760 167037
<b>Health &amp; Safety</b>	Health & Safety Unit 0161 912 4295
<b>Insurance</b>	Council Insurance Officer 0161 912 4388
<b>The Duke of Edinburgh's Award (Community Groups)</b>	The Duke of Edinburgh Award Officer 0161 911 8651
<b>Press &amp; Public Relations</b>	Press & Public Relations Officer 0161 912 4082
<b>LA Emergency Contact (24 hour)</b>	Trafford Council 0161 912 1111

Further copies of this document may be downloaded from EVOLVE [www.traffordvisits.org](http://www.traffordvisits.org)

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

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

**LOtC** [www.lotc.org.uk](http://www.lotc.org.uk)

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

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