

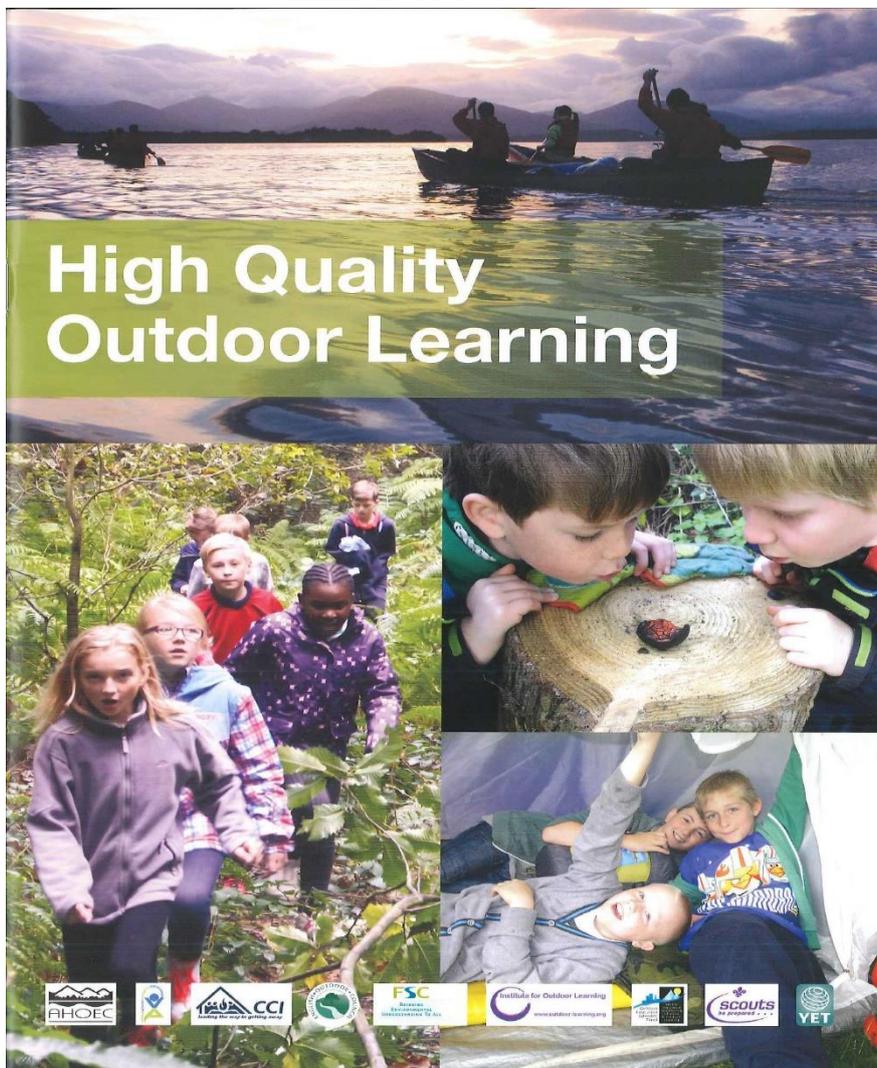


# Buckinghamshire Council

## Guidance and Requirements for Off-Site Visits and Related Activities

### Linking to National Guidance & EVOLVE

**Revised: 2022/2023**



## **About this Guidance and its Requirements and Outdoor Learning in Buckinghamshire**

This document sets out the expectations for the planning and delivery of high-quality outdoor learning that is well managed and is as safe as reasonably possible.

It is essential information for visit leaders, Educational Visits Coordinators (EVCs), heads of establishment, staff accompanying visits and those supporting the planning of visits including governors who have a nominated role for outdoor learning.

It can be accessed in the resources section of Evolve (the Council's IT system for the registration and approval of visits) and it can also be emailed. As a hard copy it sets the framework but it is best viewed online because it includes links to further information that can be updated in response to experience and changes in regulations.

Buckinghamshire Council follows 'National Guidance' for outdoor learning which is guidance used by most Local Authorities and is inclusive of the full range of provision for children and young people, including by schools, youth services and private, voluntary and charitable sectors. This Council document includes Buckinghamshire specific information such as the arrangements for minibus driver training, the hiring of coaches and useful contacts. The links select particular aspects of National Guidance but National Guidance is a wider resource that can be searched to provide answers to many visits questions.

The contents page identifies aspects of a visit that will help cover the areas for consideration of the event being planned. EVCs will support and mentor their visit leaders ensuring that this guidance and its requirements are followed before submitting the event to the head of establishment for approval.

Training is offered and provided by the Educational Visits Service for all who have roles in taking children and young people out of the classroom. The service provides ongoing email and telephone support and advice, contacts below.

Buckinghamshire has a well-established culture for outdoor learning that recognises the benefits for pupil achievement, personal development and physical and mental well-being. Yearly, there are over 18,000 visits registered in Evolve contributing to the delivery of a deep, rich learning curriculum and a broad and balanced (well-rounded) education that prepares pupils for their adult lives.

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(The booklet shown on the front page 'High Quality Outdoor Learning' can be download from Evolve 'Resources' and then the tab 'Further Guidance'.)

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<a href="#">Serious Incident Action Card for the Group Leader</a>	

## Contacts

## 1 General

The LA uses the web-based system 'EVOLVE' [bucksccvisits.org](http://bucksccvisits.org) to support planning, management, approval and evaluation of educational 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 a planning tool for staff, EVOLVE also contains a variety of features including for reports, downloadable resources, staff records and visit history.

## 2 The EVC and Visit Roles

To fulfil its health and safety obligations for visits, establishments should appoint an Educational Visits Coordinator (EVC) who will support the Head of Establishment (Head). The EVC should be specifically competent, 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.

In small establishments the EVC may also be the Head. Should the establishment choose not to appoint an EVC; those functions will automatically fall to the Head.

**The EVC must attend initial EVC training and then Update Training every third year.**

See [National Guidance](#) at [Guidance by Role](#) for the roles of:

Visit Leader, Assistant Leader, Parents, EVC, Head / Manager, Governor, Employer, Outdoor Education Adviser, Local Authority Officer, parents and volunteers.

## 3 Approval of Visits

In approving visits, the Head and EVC must know that the visit leader has been inducted and trained and is competent to lead the visit. ([Section 10](#)) The LA supports training for staff through courses and visiting schools to deliver training on request.

**Local Area Visits:** Local Area Visits will take place in pre-identified areas only and can be uploaded before or after the visit. A school policy or Standard Operating Procedure (SOP) needs to identify these areas as approval is automatically granted for these areas via Evolve. There is a sample policy/SOP in the resources area on Evolve. **Please note: The default setting for this module is for No Approval required. If you would like to set EVC approval as a requirement then please log in to Evolve, select the Cogs option from the home page and then the Local Area Visits tab to update approval. There is a short tutorial on EVOLVE if you would like to see how it works you can access the video in the Local Area Visits section.**

**All other visits:** It is recommended that all other visits – particularly day visits - are entered onto EVOLVE. Based on the visit types, EVOLVE automatically directs the flow for approval. (Schools can choose to enter sporting fixtures and swimming.)

The following visit types are 'authorised' by the establishment, and then 'approved'\* by the LA via EVOLVE: Overseas, Residential and also Adventurous Activity (if led by a member of staff from the establishment). ([Section 21](#) lists Adventurous and non-adventurous activity). Approval is delegated to the Head for all other visit types.

**Submit to the LA a minimum of 10 working days before the visit for LA approval (1 month for DofE visits and notify the LA as soon as an overseas expedition is registered on Evolve)**

\*The LA has responsibility for approval where it is the employer. Where the Governing Body is the employer, it is ultimately responsible. 'Approval' in this latter context by the LA is by invitation and is confirmation that the planning arrangements are sound based on the evidence submitted.

## 4 Outcomes

This is about what the school is trying to do, not necessarily the impact. Think about how the intended outcomes can be best expressed. Clarity is essential to ensuring that the benefits can be achieved. Up to four 'intended' outcomes may be recorded on EVOLVE during the planning process for subsequent evaluation up to 28 days after the visit.

The publication [High Quality Outdoor Learning](#) should be used as a tool in identifying outcomes and in the evaluation of the learning taking place. It can also assist the visit leader in providing clarity to a provider so that the programme can be designed to meet expectations.

## 5 Inclusion

The Equality Act states that the responsible body must not discriminate against, harass or victimise a pupil or young person because of one of the protected characteristics (disability; gender reassignment; pregnancy and maternity; race; religion or belief; sex; sexual orientation) in the way that it provides (or not) a benefit, facility or service. There is a duty to make reasonable adjustments. Activities should be available and accessible to all, irrespective of special educational or medical needs or protected characteristics. **When a visit or activity is being planned, all reasonably practicable measures must be taken to include all.**

Every reasonable effort should be made to find a venue and activities that are both suitable and accessible and that enable the whole group to participate fully and be actively involved.

See [National Guidance](#) : [3.2e Inclusion](#)  
[4.4i SEND](#)

## 6 The H&S at Work Act – Responsibilities

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

For community schools, community special schools, voluntary controlled schools, maintained nursery schools and also pupil referral units (that are not part of a MAT) the employer is the LA. These establishments must adhere to this guidance document and use Evolve. The LA will support during an emergency. The LA also has responsibilities as the corporate parent.

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 not using LA guidance, establishments must have their own guidance and should ensure that their systems are equally as robust as those of the LA.

**All schools must have access to expert advice such as from a competent Outdoor Education Advisers Panel (OEAP) Adviser.**

Governing Bodies of non-maintained schools should be aware that the LA will provide support in an emergency if requested. Information that has been notified on Evolve can be accessed by the LA and so help it to assist. As part of the school's Educational Visits Policy, Governors should agree

if - and under what circumstances - the LA would be asked to support.

See [National Guidance](#) : [3.1c Corporate Parenting](#)

## 7 Planning / Assessment of Risk and Charging

**The planning process by the leader may be compared to the expectation of a teacher or youth worker to plan a lesson/session.**

EVOLVE provides a tool for and a record of ongoing planning and enables the EVC and Head to support and monitor the planning. Risks are expected to be reduced to an *acceptable* or *tolerable* level, not necessarily eliminated.

Planning should achieve a rational balance between potential risks and the intended benefits of the activity. Additional information: [Managing Risk in Play Provision](#)

Conventional models of risk assessment are not necessarily helpful in a visits context. Visit planning should focus on, **'the really important things that we need to do to keep us safe'** taking into account significant issues specific to the event and place, the needs of the group (including special and medical needs) and the experience and competency of the staff team and the leader. (This can be recorded in a variety of ways and shared with all parties such as by using the template in Evolve 'Resources' under the tab 'Forms' or the 'Event Specific Notes' facility at the bottom of an Evolve Visit Form.)

See [National Guidance](#) : [1b Foundations](#)  
[4.3c Risk Management](#)  
[4.3g What to record and how](#)

Some aspects of planning will already be in place in the form of existing arrangements based on experience (Generic Plans). It is not necessary to attach Generic Plans to the EVOLVE Visit Form, only to reference them and ensure that they are available and known to the accompanying staff.

Planning that includes [adventurous activity](#) commonly involves delivery by an [external provider](#) ([section 29](#)).

**Where the external provider has responsibility for managing an activity, the provider's risk assessment is not the concern of the visit leader, does not need to be requested from the provider, and does not need to be uploaded to EVOLVE.** However, the leader should ask the provider for information that will help with the overall planning and those aspects for which the establishment is directly responsible.

While accreditations and other sources of information provide essential assurances, they are not a substitute for a preliminary visit and being able to clarify issues face-to-face. So, wherever reasonably practicable, **it is good practice to carry out a preliminary visit to unfamiliar facilities and providers.** The cost of this can be built into the visit budget.

See [National Guidance](#) : [4.4h Using external providers and facilities](#)

Alternative arrangements (Plan B) should be included as part of the planning process where appropriate, for example where weather conditions 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](#)

See [National Guidance](#) : [3.2c Charging for school activities](#)

## 8 Safety during the visit

Prior to the visit, the visit leader must ensure that staff, volunteers and participants understand their roles and expectations. This will include sharing the Event Specific Plan appropriately.

Monitoring of the visit by the visit leader and accompanying staff will be ongoing, and this contributes towards both enjoyment and safety.

It is primarily the responsibility of the visit leader - in consultation with other staff where appropriate - to modify (Plan B) or curtail the visit or activity, adapting to changing circumstances (e.g. over-busy lunch area, rain 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.

See [National Guidance](#) : [8i Model Code of Conduct](#)

## 9 Consent, information, contacts, 'Parent Pay' & E consent, Corporate parenting

### Schools:

Schools are **not** required to obtain consent from parents for pupils to participate in off-site activities **that take place during school hours and which are a normal part of a child's education, such as local studies and visits to a museum or library etc.** (Education Act 2002 section 29).

While parents do not have the option to withdraw their child from the school curriculum, **it is good practice to inform parents that a visit or activity is to take place.** Schools should be aware that asking for consent when it is not needed can lead to some parents assuming they can withhold consent and so withdraw their child from a curriculum visit when this is not the case.

For the principles of Corporate Parenting - including consent - see the link below. Consent **is** needed for all visits organised by establishments other than schools.

**Consent is needed by schools for visits taking place outside school hours** and also for activity taking place both during and outside school hours where it is perceived to involve a higher level of risk, such as a visit involving a long journey or adventure activity.

### Other establishments (e.g. youth provision):

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.

See [National Guidance](#) : [4.3d Consent](#)  
[3.1c Corporate parenting](#)  
[4.4j Participant Information](#)

## 10 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 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 visit history on EVOLVE).
- b) Is the leader competent in planning and managing visits?

- c) Does the leader exhibit sound decision making abilities?
- d) Is the leader an employee?
- e) Does the leader have the ability to manage the pastoral welfare of participants?
- f) What experience has the leader of the participants to be supervised?
- g) What experience has the leader of the environment and geographical area chosen?
- h) Is the leader appropriately qualified?
- i) If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- j) Is the leader aware of all relevant guidelines and able to act on these?

See [National Guidance : 3.2d / 4.4a Approval of Leaders](#)

**Where the EVC is not in position to make judgements about the competency of staff, there must be clarity within the organisation that this is a judgement for the Head.**

## 11 Staffing supervision, safeguarding and GDPR

Establishments must ensure that the staffing of visits enables leaders to supervise effectively. **A visit must not go ahead where the visit leader, EVC, or Head is not satisfied that effective supervision exists.**

**Direct Supervision** occurs when the group remains within sight and contact of a leader.

**Indirect Supervision (supervision within clear boundaries)** occurs when a group is given the freedom to explore an environment or engage in an activity away from direct supervision but within clearly identified and agreed boundaries.

**Remote Supervision** occurs when a group works at such a distance that direct supervision would take some time to be re-established (e.g. during a remotely supervised adventure walk; young people travelling independently to a venue; an orienteering activity; a Duke of Edinburgh Award expedition). For this form of supervision to be appropriate a decision must be made that the participants no longer need an adult leader but are capable of operating independently.

Staffing ratios should be determined through the process of risk assessment. However, Visit Leaders, EVCs and Heads 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 Evolve 'Resources' and then the tab 'Guidance & Requirements' for starting points for Primary and Secondary Visits, Reception and Younger, and Special School visits.**

The Early Years Foundation Stage (EYFS) Statutory Framework (updated 3rd April 2017) no longer sets out different requirements for minimum ratios during outings from those required on site. **As with other age groups, ratios during outings should be determined by risk assessment, which should be reviewed before each outing.** The appropriate ratio on an outing is always likely to be higher than the legal minimum (for children aged three and over in early years settings either 1:8 or 1:13 and 1:30 in infant school reception classes in maintained schools). It is not unusual for a ratio of 1:1 to be necessary.

**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 supervision of 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.

In addition to employees, the Disclosure and Barring Scheme (DBS) commonly applies to volunteers or parents accompanying their child in a residential visit context.

**For GDPR considerations, see the link below to 4.4j.**

See [National Guidance](#) :  
[4.3b Ratios and Effective Supervision](#)  
[4.2a Group Management and Supervision](#)  
[4.3e Safeguarding](#)  
[3.2g Vetting and DBS checks](#)  
[6i FAQ Unsupervised time](#)  
[6j FAQ Taking a family member on a visit](#)  
[4.4e Terrorism](#)  
[4.4j Participant info and Data Protection](#)

## 12 First Aid and Medication

Qualified first-aiders may not be necessary for all visits however, there should be a basic level of first aid support available at all times. This will require that one or more of the staff on the activity:

- Has a working knowledge of simple first aid.
- Is competent to use the first aid materials carried with the group.
- Knows how to access, and is able to access, qualified first aid support.

A 'Basic Skills' non-assessed course is generally 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 children in the Early Years Foundation Stage (EYFS)**, there is a statutory requirement that at least one person who has a current paediatric first aid certificate must accompany children on outings.

It is a legal requirement that all public service vehicles, including minibuses, carry a first aid kit.

Section 100 of the Children and Families Act 2014 places a duty on governing bodies of maintained schools, proprietors of academies and management committees of PRUs to make arrangements to support pupils with medical conditions.

See [National Guidance](#) : [4.4b First Aid](#)  
[4.4d Medication](#)

## 13 Insurance

LA establishments or those that have purchased the LA insurance package can seek advice from the Schools web site <https://schoolsweb.buckscc.gov.uk/administration-legal/insurance/> (you will need your schools web login) or LA Insurance Service – **Sue Clowe 01296 531168 [insurance@buckinghamshire.gov.uk](mailto:insurance@buckinghamshire.gov.uk)**. Academies must check with their own insurers.

**The LA expectation for the level of Public Liability Insurance held by Adventurous Activity providers is £10 million.**

LA schools that are planning to use a provider of such activity with less, must first speak to Sue Clowe. (See [section 22](#) for list of Adventurous Activity.)  
For visits abroad, visits including adventurous activities and residential visits, journey insurance must be taken out.

The responsibility for arranging adequate insurance cover rests with the visit leader. Cover can be arranged through Buckinghamshire Council's Insurance department, **but if there is not a yearly cover in place application must be submitted at least 4 weeks before commencement of the journey.**

**The cancellation element of cover (e.g. the cost of airline tickets) is only in force from the date the insurance proposal form is received. Therefore, request cover before making any payment.**

For those that would normally use the LA insurance, if alternative insurance arrangements are proposed by a provider, the policy must be agreed by the LA insurance section **and a copy submitted at least 8 weeks prior to the visit.** This allows time to check the cover provided and for the establishment to make alternative arrangements if needed.

**Academies** should check the suitability of any 'included' policies with their own insurers. Basic levels of cover for Personal Accident and Personal Liability should be as follows:

Personal Accident	Capital Sum £25,000 with a full continental scale
Medical & Associated Expenses	£5,000,000
Personal Property & Money	£1,500
Cancellation	£2,500
Personal Liability	£2,000,000

A copy of the policy for the visit must be available to all party leaders, volunteers and parents. For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card) if still valid or a GHIC (Global Health Insurance Card).

See <https://www.gov.uk/global-health-insurance-card>

**National Guidance** : [https://oeapng.info/search\\_gcse/?q=Insurance](https://oeapng.info/search_gcse/?q=Insurance)

4.4c Insurance

## 14 Transport

### 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, and a 'Private Car' Form completed and retained by the establishment annually. (Evolve 'Resources' and the tab 'Forms'.)

### Coaches

**The LA's Client Transport Team has access to transport it considers suitable.**

If a school is unsure of what operator to choose the Client Transport Team can advise on which operators it uses. It cannot recommend a single transport provider, however it can give advice on a number of its approved transport providers within your area. (Contact the Client Transport Team via the following email address: [maintrans@buckinghamshire.gov.uk](mailto:maintrans@buckinghamshire.gov.uk))

When using one of its providers, the school should always request a driver that holds a valid BC Client Transport ID Badge and check the drivers badge when the coach arrives.

**A regularly used and trusted coach company may sub-contract over busy periods with a possible loss of quality. Consider stipulating that your booking will not be sub-contracted unless you are asked well in advance for your agreement.**

### Minibuses driven in the UK

If you own or hire a minibus you must have an operational policy and a maintenance schedule. The driver of a minibus with a Gross Vehicle Weight (GVW) of over 3500 kg must hold a Category D1 Licence. Staff who passed their test after January 1st 1997 will require a Passenger Carrying Vehicle (PCV) course and test.

Chiltern Development Training <http://chilterndrivertraining.co.uk/> provides minibus tests and PSV training and assessment for the LA.

Minibuses under a GVW of 3500 kg can be driven by someone who holds a Category B Licence (with the additional requirements explained below) which is achieved by passing the standard car test. **It would be expected that such a licence holder would take a minibus test (not PCV) to confirm competence to drive this type of vehicle.** (A Category B Licence holder cannot tow a trailer.)

- Driver is aged 21 years or over.
- Has 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.
- Driver is 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.

**It is strongly advised that all minibuses with 9-16 passenger seats display a Section 19 permit.** (Email [fleetmanagement@buckinghamshire.gov.uk](mailto:fleetmanagement@buckinghamshire.gov.uk) or Traffic Commissioner for registration forms) This will overcome an unlikely but possible challenge about provision for hire and reward and use beyond social purposes and also provides exemption to the requirement for a tachograph. Graham Groom BC Fleet Manager (01296 387734/ 07885 622175) can advise.

**All LA minibus drivers must have passed the BC minibus test.** Academy minibus drivers are advised to take the BC minibus test or undertake MIDAS training and keep that training current (refreshers).

See [National Guidance](#) : [4.5b Transport in minibuses](#)  
[4.5c Transport in Private Cars](#)  
[4.5a Transport – General](#)  
[4.5d Seat belts](#)

## 15 Specialist Activities and Visits

Visits to Farms including Farm Parks & Zoos. Heritage visits, Museums and Galleries, Field Studies, Armed Services, Study Tours.

See [National Guidance](#) : [Specialist Activities and Visits](#)

## 16 Water-Margin Activities

The linked document 'Group Safety at Water Margins' (below) covers activities that might take place near or in water – such as a walk along a river bank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow water.

It does **not** cover swimming and other activities that require water safety or rescue qualifications and equipment or water-going craft.

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

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

**Document 7i Group Safety at Water Margins must be made available to all supervising adults in advance. Leaders planning for young people to enter the water should also see [Section 20](#).**

See [National Guidance](#) : [7i Group safety at water margins](#)

## 17 Residential Visits

**Residential visits introduce specific additional management issues.**

See [National Guidance](#) : [4.2b Residentials](#)

[6l Transgender young people](#)

[4.2a Group Management and Supervision](#)

[6m FAQ Managing a residential when you know that some of the participants are in a sexual relationship](#)

## 18 Overseas Visits and Exchange Visits (for Expeditions see [Section 26](#) )

The visit leader should consider the relevant country information from the Foreign and Commonwealth & Development Office (FCDO) website: <https://www.gov.uk/foreign-travel-advice> and relevant FCO information should be circulated amongst the staff team.

See [National Guidance](#) : [7q Overseas Expeditions](#)

[7r Overseas Visits](#)

[7f Exchange visits and homestays](#)

[3.2g Vetting / Disclosure / DBS](#)

(Page 6 of 3.2g explains three exchange and homestay settings and DBS considerations)

**Helpful links for the relationship between the UK and the EU:**

Government website: [Visit Europe from 1 January 2021 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/visit-europe)

ABTA website: <https://www.abta.com/tips-and-advice/brexit-advice-for-travellers>

## 19 Weather, Clothing & Survival

The leader must 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);

An agreed 'Plan B' should be a ready alternative.

## 20 Swimming

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

### **Swimming pools including hotels**

The use of a pool should be clearly identified as part of your visit planning and never a spontaneous decision. LA Approval is not required **if there is adherence to doc 7x** (link below).

**Natural Water Bathing** (i.e. not in a swimming pool)

A 'Note' should be added to the EVOLVE visit form for the attention of the LA detailing the activity.

LA Approval **is required** via EVOLVE.

See [National Guidance](#) : [7x Swimming pools](#)  
[7o Natural water bathing](#)

## 21 Definition of an 'adventurous activity'

**The following activities are regarded as 'adventurous' and require LA approval:**

- Trekking in 'Lowland', 'Moorland' and 'Mountain' country \*
- Swimming (all forms, excluding publicly lifeguarded pools)
- Camping
- Canoeing / kayaking / sailing / windsurfing / kite surfing / paddle boarding
- 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 and abseiling (including indoor climbing walls) including
- River / gorge walking or scrambling
- Coastering / coastal scrambling / sea level traversing
- Underground exploration
- Shooting / archery / paintballing
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- Cycling – on and off road
- Ice skating (rink)
- Trampolining (parks)
- 'Extreme' sports and other activities involving skills inherent in any of the above

\* see [Section 24](#)

The following activities are not regarded as adventurous and therefore do not require approval by the LA but must be supervised by a member of staff who has previous relevant experience:

- 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 and tourist attractions
- Pedal go-karts
- Farm visits, museum, library, etc.
- Local traffic survey
- Physical Education and sports fixtures (other than the above)
- Water-margin activities as defined in

[Section 16](#)

**Contact the Outdoor Education Adviser if there is uncertainty over whether a particular activity requires LA approval.**

## 22 Adventurous Activities

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

[Water-based activities](#)

[Section 23](#)

Trekking in 'Lowland', 'Moorland' and 'Mountain' country

[Section 24](#)

[Snowsports](#)

[Section 25](#)

[Overseas expeditions](#)

[Section 26](#)

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

a) **An external provider**

[Section 29](#)

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

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

Note: Whilst the responsibility for the safety of participants rests with the provider (it has a duty of care), the accompanying staff also retain a duty of care.

**or**

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

[Section 28](#)

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

(See Activity Leader Qualifications:

[Section 24](#))

## 23 Water-based Activities

For clarification between Water-Margin and Natural Water Bathing activities see [Section 16](#)  
The following are not regarded as adventurous activities for the purposes of LA approval:

- Swimming in publicly lifeguarded pools - see [Section 20](#)
- Water-margin activities as explained in [Section 16](#)
- Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

With the exception of these, 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 water based activity will rest with either:**

a) **An external provider** - see

[Section 29](#)

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

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

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

**Or**

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

[Section 28](#)

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

See Activity Leader Qualifications:

[Section 24](#)

## 24 Activity Leader Qualifications and DofE

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

- a) **An external provider** - see [Section 29](#)  
or
- b) **A member of your establishment's staff**  
This person must be specifically approved by the LA via EVOLVE to lead the activity.

**The following is a summary of the types of terrain (for walking and cycling) or water type (for paddlesports) used to determine the appropriate minimum leadership qualifications:**

(For further information about paddlesports see AALA inspector notes 5.15, for off-road cycling notes 6.12 and 5.18 for other adventure activities. See:

<http://webcommunities.hse.gov.uk/connect.ti/adventureactivitiesnetwork/view?objectId=582565>

For guidance about other forms of travel, such as by horse or wheelchair, see the relevant AALA note or consult your Outdoor Education Adviser.)

### **Walking (Trekking)**

The matrix in AALA note 5.18 lists the approved minimum qualifications for three levels of terrain. These levels are described by the awarding bodies in their course information, and are summarised below. There are different qualifications for summer and winter: those shown below are for summer conditions only (i.e. when there is no unavoidable snow or ice on any part of the route); for winter qualifications see the AALA matrix.

### **Lowland Country**

Farmland, valleys and woodland with no hazardous terrain (e.g. cliffs, very steep slopes, water hazards etc.) and no more than 3km away from a key access point such as a car park, lay-by or populated area (any potential escape routes should also lie within Lowland Country). Walks must follow paths or tracks that are both marked on a map and clearly visible on the ground and that do not require navigation across untracked areas, and must use bridges or other recognised water crossing points.

Minimum recognised qualifications:

- Lowland Leader Award, with Expedition Skills Module if camping [www.mountain-training.org](http://www.mountain-training.org);
- Lowland Expedition Leader Award (previously Basic Expedition Leader) [www.sportsleaders.org](http://www.sportsleaders.org);
- Countryside Leader Award [www.countrysideleaderaward.org](http://www.countrysideleaderaward.org).

### **Moorland Country**

Open, uncultivated, non-mountainous, high or remote country (known variously as upland, moor, bog, fell, hill or down), which should not require movement on steep or rocky terrain in either a planned or unplanned situation. Walks should be in areas enclosed by well-defined geographical or man-made boundaries such as classified roads (areas that merge with mountain regions without well-defined boundaries should be regarded as Mountain Country).

Minimum recognised qualifications [www.mountain-training.org](http://www.mountain-training.org)

- Hill and Moorland Leader Award, with Expedition Skills Module if camping;
- Walking Group Leader.

### **Mountain Country**

Wild country, which may contain steep and rocky ground where walkers are dependent upon themselves for immediate help.

Minimum recognised qualification

- Mountain Leader see [www.mountain-training.org](http://www.mountain-training.org).

## Cycling

There are two levels of terrain for cycling, which are described in the matrix in AALA note 6.12, along with the appropriate qualifications. Leaders should also hold the relevant minimum walking (trekking) qualification for the terrain through which the expedition passes.

## Paddlesport

The matrix in AALA note 5.15 summarises the appropriate qualifications for canoeing, kayaking and other paddlesports in various contexts, including:

- "Open Water (Local)", e.g. a canal journey;
- Open water journeying;
- Simple and advanced white water;
- Simple and advanced sea journeys.

The paddlesport qualifications should be complemented by walking expedition qualifications as detailed above, relevant to the terrain through which the expedition passes.

**DoE** see also [https://oeapng.info/search\\_gcse/?q=7b](https://oeapng.info/search_gcse/?q=7b) 7b Duke of Edinburgh's Award Expeditions

## 25 Snowsports visits

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

**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 28](#)

**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 28](#)

**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 28](#)

**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 met.

See [National Guidance](#) : [7v Snowsport visits](#)

**Important re Waivers:** [3.2i Contracts and Waivers](#)

## 26 Overseas Expeditions

**Given the complexity of Overseas Expeditions, discuss with your Outdoor Education Adviser the selection of an expedition provider.** You are encouraged to use a provider that holds LOtC Quality Badge that is specific to Overseas Expeditions [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**Note: If the provider being considered is not a British registered company and therefore not subject to British law, contact the Educational Visits Adviser at the earliest opportunity before making any commitment.**

Register the expedition on Evolve as soon as the provider has been chosen **and leave your Adviser an Evolve note.**

Staffing arrangements apply as set out in [section 11](#), Staffing and Supervision.

Visit leaders will benefit from attending the one day course 'Overseas Expeditions and Fieldwork: a Course for Teachers' organised by the Royal Geographical Society [www.rgs.org/eac](http://www.rgs.org/eac)

See [National Guidance](#) [7q Overseas Expeditions](#)

## 27 Emergency Procedures

Staff must adhere to their establishment's policy on emergency procedures.

As part of the planning and preparation for all visits, **two emergency contacts should be identified on the EVOLVE form. For residential visits where the emergency contact has a home landline number it must be included on the form otherwise enter 'No home landline'.**

For visits that take place outside normal establishment hours a Serious Incident Action Card must be with the Visit Leader at all times. An example and copies of an Incident Log and Incident Recording Sheet - which should also be taken on the visit by the Visits Leader – can be found in Evolve 'Resources' under the tab 'Emergency Procedures'.

**Note for academies:** The LA will work alongside the academy in support of the help provided by the academy and its insurers during the response phase of the emergency. The response and communications during the emergency may be significantly more effective where the visit has been approved on Evolve prior to the visit taking place. Academies are expected to have an emergency plan which clearly identifies the circumstances under which the LA will be asked to support. **Even if support is not requested, the LA should be informed of an emergency.**

### Knowing what to do in an emergency:

See [National Guidance](#) : [4.1h Avoiding Accidents and Emergencies](#) | [4.1i Emergencies and Critical Incidents – An Overview](#) | [4.1k Visit Leader Emergency Checklist](#) | [4.1j Off-Site Visit Emergencies: The Role of School Governors](#) | [4.1l / 8.1l Visit Leader Emergency Action Card – amendable version.](#)

## 28 Approval of staff to lead an adventurous activity

Staff who wish to **lead** (i.e. supervise or instruct) an adventurous activity, as defined in [Section 21](#), must scan copies of their relevant qualifications (e.g. instructor certificates, first aid etc.) to the 'My Details' section of their EVOLVE account.

The visit leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will ask for an **Activity Leader Form (ALF)** to be completed, which will request further details regarding the proposed venture (e.g. dates, venues, numbers, etc). The ALF will then be embedded within the Visit Form for that particular visit. On receipt of a Visit Form (and embedded ALF), the Outdoor Education Adviser will view the proposed activity in the context of the leader's competencies and qualifications.

### 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 Outdoor Education Adviser. 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.

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.

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.

See [National Guidance :Approval of Leaders](#)

## 29 Using an External Provider

An 'External Provider' delivers 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
- 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. The LA does not 'approve' external providers (except for coaches see [section 14](#)) or tour

operators. Establishments will find it useful to 'Search by Provider' on EVOLVE, and liaise with other LA establishments that have used a particular 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**

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

Note: If a Provider holds an Adventure Activity Licencing Authority (AALA) Licence (and/or any other accreditation) but not an LOTC Quality Badge, then a Provider Statement Form is still required.

See [National Guidance](https://oeapng.info/search_gcse/?q=AALA) : [https://oeapng.info/search\\_gcse/?q=AALA](https://oeapng.info/search_gcse/?q=AALA) 3.2f AALA Licencing

**Note: EVOLVE automatically identifies providers that hold an LOTC Quality Badge and includes the level of Public Liability Insurance carried.**

**For Providers that hold an LOTC Quality Badge:** No further action is necessary, other than to check the suitability of the provider/venue in relation to the intended learning outcomes for the particular group.

**For Providers that do not hold an LOTC Quality Badge:**

- Download a '[Provider Statement Form](#)' See [National Guidance](#) A word version or PDF version is available for download.
- Complete the top section. (Print or fill in online using Adobe Acrobat reader fill & sign function.)
- Send Provider Form to the provider (email, fax, post).
- On its return check that it has been satisfactorily completed.
- Keep the [Provider Statement Form](#) on file together with all other relevant documentation.
- It is not necessary to attach the form to EVOLVE but use the 'other' option heading for attachments if you wish to do so.

**Important:** If the Provider has made any alterations to the wording of the [Provider Statement Form](#) or is unable to comply, seek advice from your Outdoor Education Adviser prior to making a commitment with the Provider. (Attach the form to Evolve using the 'other' option in the attachments field.)

**The [Provider Statement 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 Statement 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.**

**The above procedure is not sufficient for Overseas Expeditions** for which separate arrangements are applicable and **must** be complied with, see [Section 26](#)

## EVENT SPECIFIC PLAN (ESP)

(What are the really important things we need to do to keep ourselves safe? The Visit Leader should involve the accompanying staff, and also participants where possible.)

Visit Leader..... Visit to ..... Carried out by ..... Date .....

ISSUE	HOW TO MANAGE IT	WHO TO BE INFORMED		
		PARENTS	STAFF	PARTICIPANTS

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

# Serious Incident Action Card for the Group Leader

- Summon emergency services if appropriate
- Provide first aid / prevent further injury
- Account for all party members including staff
- Delegate a responsible adult to take care of uninjured members of the party
- Instruct no-one to talk to media and secure inappropriate use of mobile phones or email and social media (e.g. Facebook, Twitter etc)
- Activate the emergency procedures by calling

**01183 589 332 (+441183 589 332 if calling from abroad)**

(This is the Bucks Fire and Rescue Control Room number) **YOU MUST REQUEST THAT THE BUCKINGHAMSHIRE COUNCIL'S DUTY RESILIENCE OFFICER IS PAGED. If unsuccessful call 07738 501 318 (BC Resilience team back-up phone).**

Be prepared to provide the following information which will be passed to the duty Resilience Office for Buckinghamshire Council by Buckinghamshire Fire and Rescue Service.

- The complete telephone number which we can call you on (including national /area codes etc)
- your name
- the name of your school /party
- the nature of the emergency

Ensure you leave this information before any further discussion takes place, in case you are cut off. If possible, also provide:

- your location
- further details of the nature of the incident
- any other contact numbers that can be used

In order that you can be contactable at all times and to enable you to lead and coordinate all necessary actions you should delegate party leadership to the Deputy Leader.

## **Log-keeping:**

A copy of the Incident Record sheet can be used to note down the information Record:

- further and full details of the incident, how and why it happened so far as can be established at this stage
- all action taken and conversations held

You should not make any public statements about the incident without prior agreement of a statement with the Council's Incident Control Team.

Ask those in the group to write individual statements of what they saw / heard in relation to the incident

Depending on the circumstances some or all of the following actions may be required:

- Retain all equipment involved in an accident or incident in an unaltered condition - unless it is required by the police
- Begin to make appropriate arrangements for those not injured to return home immediately
- Arrange any support for the staff and injured in hospital
- Obtain necessary documentation from the medical authorities e.g. death certificates, medical certificates indicating how injured may travel home, and case histories including x-rays
- Retain receipts for all expenditure connected with the incident.

## **Contacts**

<b>Buckinghamshire Council Emergency Number</b>	<b>Tel: 01183 589 332</b> <b>(Ask for Buckinghamshire Resilience Team)</b> If unsuccessful call 07738 501 318 (BC Resilience team back-up phone).
<b>Outdoor Educational Advisor</b>	Mike Harwin Tel: 07890 395 028 Email: <a href="mailto:mike.harwin@buckinghamshire.gov.uk">mike.harwin@buckinghamshire.gov.uk</a>
<b>County Educational Visits Coordinator</b>	Tracey Erasmus Tel: 01296 383030 Email: <a href="mailto:tracey.erasmus@buckinghamshire.gov.uk">tracey.erasmus@buckinghamshire.gov.uk</a>
<b>Outdoor Learning teacher / specialist provider of onsite LOTC and INSET / Lead for Bucks Outdoor Network and Forest Schools</b>	Julie Lloyd-Evans Tel: 07561 710590 Email: <a href="mailto:LearningWithoutWalls@outlook.com">LearningWithoutWalls@outlook.com</a>
<b>Swimming Adviser</b>	Zoe Coll Tel: 01296 388222 ext 421 Email: <a href="mailto:swimming@ahs.bucks.sch.uk">swimming@ahs.bucks.sch.uk</a> Website: <a href="http://Bucks School Swimming Partnership (bssp.org.uk)">Bucks School Swimming Partnership (bssp.org.uk)</a>
<b>All about Plants</b> (Mapping of plants in your school grounds)	Dr Karen van Oostrum Tel: 07910 684339 Email: <a href="mailto:Karenjvano@outlook.com">Karenjvano@outlook.com</a>
<b>EVOLVE website</b>	<a href="http://www.buckscvisits.org">www.buckscvisits.org</a>
<b>Health &amp; Safety</b>	HR Service Desk Tel: 01296 382233 Email: <a href="mailto:hrservedesk@buckinghamshire.gov.uk">hrservedesk@buckinghamshire.gov.uk</a>
<b>Insurance</b>	Rachael Ruddy Tel: 01296 383197 Email: <a href="mailto:rachel.ruddy@buckinghamshire.gov.uk">rachel.ruddy@buckinghamshire.gov.uk</a> Or Sue Clowe Tel: 01296 531168 Email: <a href="mailto:insurance@buckinghamshire.gov.uk">insurance@buckinghamshire.gov.uk</a>
<b>Transport</b>	Graham Groom Tel: 07885 622175 Email: <a href="mailto:graham.groom@buckinghamshire.gov.uk">graham.groom@buckinghamshire.gov.uk</a>
<b>Resilience Team</b>	Andy Fyfe Tel: 01296 382937 Email: <a href="mailto:andy.fyfe@buckinghamshire.gov.uk">andy.fyfe@buckinghamshire.gov.uk</a>