



Guidance for Educational Visits and Off-site Activities

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Contents

		Page Nos
1	<u>Introduction</u>	5
2	<u>Responsibilities</u>	5
3	<u>Approval and Outcomes</u>	7
4	<u>Visit Planning, Plan Bs and Inclusion</u>	7
5	<u>Risk Assessments</u>	8
6	<u>Preliminary Visits and Visit Safety</u>	9
7	<u>Parent/Carer consent</u>	10
8	<u>Staffing and supervision</u>	10
9	<u>Staff accompanied by their own children/family members</u>	12
10	<u>Indirect/Remote supervision</u>	12
11	<u>First Aid and Medical Conditions</u>	13
12	<u>Insurance</u>	15
13	<u>Transport</u>	15
14	<u>Weather, clothing & survival</u>	17
15	<u>Using an external provider or tour operator</u>	17
16	<u>Emergency procedures</u>	19
17	<u>Water-margin activities</u>	19
18	<u>Residential visits</u>	20
19	<u>Overseas visits</u>	20
20	<u>Swimming</u>	21

21	<u>Definition of an adventurous activity</u>	23
22	<u>Approval of staff to lead an adventurous activity</u>	25
23	<u>Water-based activities</u>	26
24	<u>Walking activities</u>	26
25	<u>Snowsports</u>	27
27	<u>Contacts</u>	29
27	<u>OEAP Links</u>	29
28	<u>Evolve Key Guidance</u>	30

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1. Introduction

- 1.1 Bolton Council (the Local Authority) recognises the value of educational visits for young people and fully supports and encourages those that are well planned and managed. This document provides advice and practical guidance to establishments buying into and using the EVOLVE system via the LA health and safety team Service Level Agreement.
- 1.2 The LA (Local Authority) uses the web-based system 'EVOLVE' to facilitate the 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).
- 1.3 To assist users, this guidance provides links to external agencies which offer additional topic specific direction. For example, advice issued by technical advisors; the OEAP (Outdoor Education Advisors Panel) or Enforcement Agencies; for example, the HSE (Health & Safety Executive). ***However, the Council is not responsible for and cannot guarantee accuracy of information on sites that it does not manage; and inclusion does not mean the Council endorses the linked site.***

2. Responsibilities

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

- For community schools, community special schools, voluntary controlled schools, maintained nursery schools, and statutory youth groups, the employer is the LA. These establishments will automatically enter into/and pay for the educational visits Service Level Agreement (SLA). They must adopt and follow this guidance document however, if they choose to opt out of the SLA, establishments must ensure that their own systems are equal to or better than those of the LA.
- For academies, foundation schools, voluntary aided schools, and Pupil Referral Units 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 the establishment has bought into the Educational Visits SLA, then they must adopt and follow the LA Guidance.

2.1 Role of the Health and Safety Team

The Health and Safety Team provide advice and guidance to schools/establishments regarding the planning and risk management of educational visits. In particular the team are responsible for reviewing and providing advice on specific visits, e.g. adventurous, residential and overseas.

2.2 Role of the Head teacher/Head of Establishment

Responsibility and accountability within the school for the approval of educational visits remains with the Head teacher or the Head of the Establishment. The OEAP provides guidance on some of the expected roles/ responsibilities. See [Section 29 OEAP Links](#).

2.3 Role of the Educational Visits Coordinator

To help establishments fulfil their health and safety responsibilities for visits, an Educational Visits Coordinator (EVC) must be appointed who will support the Head of Establishment. (In small establishments the EVC may also be the Head of Establishment). The EVC should be competent, ideally with practical experience in leading and managing a range of visits to those typically run. The OEAP provides guidance on some of the expected roles/ responsibilities. See Section 29 OEAP Links.

Selection and Competence of Educational Visits Coordinator (EVC)

Schools should appoint an EVC that has experience in planning and/or undertaking visits. Additional training is provided for EVC's by the LA periodically.

EVC's should not be appointed when they are in roles where they have little to no experience of attending or planning a visit. Examples would be administrative staff that have not been on visits or planned them.

It is important that persons fulfilling the role of an EVC has sufficient knowledge and experience with educational visits that they will be able to assess whether the proposed supervision and risk management information provided will evidence effective safety management.

2.4 Role of the Group/Visit Leader

The Group/Visit Leader must be an employee of the establishment and not a volunteer. They will have the overall responsibility and accountability for the supervision and conduct of the visit. The key requirement for a Group/Visit Leader is that they are competent to lead that particular visit e.g. with appropriate knowledge and experience. The OEAP provides guidance on some of the expected roles/ responsibilities. See Section 29 OEAP Links.

3. Approval and Outcomes

Approval is delegated to the Head of Establishment for all visits; however, the following types of visits are then submitted to the LA for further review and guidance.

- Overseas
- Residential
- Those involving an adventurous activity – examples listed in [Section 21](#).

These visits must be 'authorised' within the establishment and submitted to the LA for approval.

All visits that are sent to the LA **must be submitted at least 4 weeks** before start date of the visit. This will allow time for clarifying/-resolving any issues that may arise. The LA may not have sufficient time to review visits submitted within 4 weeks.

Also see the Evolve Key Guidance Section.

4. Visit Planning, Plan B's, and Inclusion

All school trips should be planned so that hazards are identified and adequately controlled - this should be proportionate to the level of risk.

We recommend that planning should be completed by splitting the trip into 3 stages.

- Before (development stage),
- During (to take account associated risk, changes, or issues) and
- Trip evaluation after the trip (to capture best practice/lessons learnt for future trips)

What is a Plan B?

A Plan B is an alternative activity that can be used if for safety reasons you need to change your plans or activity – it is not an emergency procedure. A plan B might mean doing the same activity at a different location, on a different day or completing a different activity altogether. Be prepared to move to Plan B before or even during the current activity. If you visit a place regularly or when gaining information about a visit you might gather information which will help you to identify *cut-off criteria*. These are signs that circumstances have changed such that you need to move to Plan B. Examples might include a river or tide having risen above a certain point. It starts to snow heavily as you start a walk across lowlands. Being told that there has been an outbreak of infection or illness at a place you intend to stay. It is prudent then to include plan B's within the planning process where appropriate, e.g. where weather conditions or water levels might be critical, or you are completing a trip where the weather may be unpredictable. It is good practice to involve

accompanying staff in the planning and organisation of visits, as in doing so they will make more informed decisions and will become more 'risk aware'.

The OEAP provides comprehensive advice to establishments planning visits.

See Section 29 OEAP Links.

Inclusion

Establishments must ensure that pupils with additional needs, e.g. physical/behavioural are not excluded from educational/off-site visits and that any reasonable adjustments are considered as part of the visit/planning process. Where it is deemed necessary, record how you will manage the needs of students by completing a Pupil Based Risk Assessment (PBRA).

5. Risk Assessments

The Health and Safety Executive (HSE) recognises that learning outside the classroom helps to bring the curriculum to life – it provides deeper subject learning and increases self-confidence. It also helps pupils develop their risk awareness and prepares them for their future working lives. Striking the right balance between protecting pupils from risk and allowing them to learn from school trips is essential for realising these benefits.

The school's arrangements for trips should ensure that; risk assessments focus attention on real risks – not risks that are trivial and fanciful and that proportionate systems are in place – so that trips presenting lower-risk activities are quick and easy to organise, and higher-risk activities are properly planned and assessed.

Staff should risk assess the parts of the trip/visit/activity they are responsible for.

School staff retain a duty of care relating to pastoral supervision/behaviour management even when a provider is leading, and these duties must be considered when assessing risk.

The school may also need to carry out individual pupil risk assessments to ensure appropriate arrangements are in place to ensure the safety of children with medical conditions. See Section 11 First Aid and Medical Conditions for further information.

Template risk assessments can be found in the Evolve 'resources area' section which cover areas such as planning, travel, and accommodation.

For most visits requiring LA approval a 'General Planning' risk assessment and a 'Travel' risk assessment are the minimum requirements for approval, and if completed correctly will be sufficient for many trips.

For educational visits that are not fully covered by the template risk assessments, schools will need to ensure that the hazards and controls necessary are detailed in their risk

management submissions. This means additional risk assessments may be required or further information added to the template risk assessments so that they contain the additional risk management information.

This might be due to remoteness from the establishment, the nature of the activities, the environment or venue(s), the nature of the group, the need for specialist leader competencies, or any combination of these.

Where schools choose to develop their own risk assessments, they should include all relevant hazards and controls that are detailed on the LA templates. If this information is not provided, the visit may be returned or held until this is provided.

General guidance on carrying out and recording risk assessments can also be found in the Evolve 'resources area' section. See 'Risk Assessment Guidance.'

Provider Risk Assessments

External providers are responsible for assessing the risks of those parts of the visit that they are contracted to provide. See Section 15. "Using an external provider or tour operator."

It is good practice to obtain risk assessments from external providers and attach them to the visit forms on Evolve, so that staff attending can access them.

Schools are expected to review and follow risk assessments supplied by the provider as they may include specific hazards or other aspects of the venue or provision that need to be considered in their own risk assessments.

Provider risk assessments are not reviewed by the LA. They will also not be accepted as evidence of the school's own assessment of risk, and any visit/trip submission that contains only provider risk assessments, will not be approved.

Where there is a concern around a provider's risk assessments (suitability/quality), schools can seek advice from the LA, however, the decision to use a provider will normally reside with the school unless the LA advises otherwise.

The OEAP also provides an overview of risk management during outdoor learning and offsite visits. See Section 29 OEAP Links.

6. Preliminary Visits and Visit Safety

Wherever reasonably practicable, it is good practice to carry out a preliminary visit to any unfamiliar facility or venue. Visit leaders must thoroughly research the suitability of the venue and check that facilities and third-party provision will meet the group's needs and

safety adequately managed. Visits and research will help you plan how your trip should be managed and will help you decide upon supervision levels.

OEAP provide further information on the use of external providers and facilities.

See [Section 29 OEAP Links](#).

7. Parent / Carer Consent

The LA follows Department of Education Guidance regarding consent for school trips/visits and highly recommends establishments to do the same.

[Health and safety on educational visits - GOV.UK](#)

Establishments may make use of an annual consent form for activities that take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required.

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

Establishments must ensure that they have a procedure in place to deal with circumstances where parental consent is not obtained or is withdrawn. This information could be recorded in their own educational visits policy.

8. Staffing and Supervision

Effective supervision is required for all visits: the visit leader, EVC and Head of Establishment must decide what supervision levels are needed by considering:

- The age, maturity, and needs of individuals within the group, including those with additional needs.
- The type of visit and duration.
- Planned activities, including remote supervision and downtime.
- The experience and competence of staff and other adults.

A visit must not go ahead where the visit leader, EVC, or Head teacher is not satisfied with the levels of supervision.

Staff Ratios

Pupil to staff ratios for school trips are not prescribed in law.

The staffing required to run the visit safely needs to be identified through the Risk Assessment process rather than a simple numerical calculation of ratios. It is important

to have a high enough ratio of adult supervisors to children/young people for any visit.

The only exception is in Early Years where the Early Years Foundation Stage (EYFS) Statutory Framework sets out legal minimum ratios for all providers working with children up to age five, and for childminders working with children up to age eight. See [EYFS Statutory Framework](#)

Supervision levels

When determining supervision levels, the key areas to consider are the; travel method, location/venue, activity, age, maturity and needs of the group, experience and competence of staff, and interactions or otherwise with the public or other groups.

Lower supervision levels may be appropriate for visits to controlled environments where they are transported point to point and into an enclosed area such as a museum, theatre, sports venue etc, but higher levels may be required where there is little to no control over the environment and mode of transport, or where adventurous type activities are carried out, with an increased risk of injury.

The total supervision level should always be determined by factoring in the loss of staff due to dealing with an accident or illness to a pupil, so that remaining staff can still effectively manage the group size.

When a visit has very low staffing (e.g. 1 or 2 staff) the risk assessment will need to clearly cover what emergency arrangements are in place if that staff member is unable to continue in their role.

Finally, where staff are specifically assigned to support the special needs of an individual, then these adults cannot be included in the overall staffing ratio and their responsibilities should not include the wider group.

A table of suggested minimum supervision ratios is detailed below.

These ratios are based; on guidance which has now been withdrawn in favour of the risk-based approach, and practice in other local authorities. They should only be regarded as starting points for consideration rather than being definitive.

	School years 1 - 3	School years 4 - 6,	School years 7 onwards,
Suggested minimum staff/student ratio for a relatively straightforward activity where the group has no additional needs.	1:6	1:10/15	1:15/20

The OEAP provide further guidance to help you decide on supervision levels.

See Section 29 OEAP Links.

9. Staff accompanied by their own children/family members

If staff want to include their own children or family members on a trip/visit, then approval must be sought and given in writing by the Head of Establishment. The trip risk assessment must include the arrangements and control measures to manage any additional hazards/risks and foreseeable issues this may cause.

We strongly advise that children of persons staffing the visit should only be included if they are of similar age and/or ability as the other participants, however the decision and overall accountability lies with the Head.

The Head of Establishment must consider that a staff member who is also acting as a parent may have divided loyalties and demands upon their time, especially in an emergency. Here staffing ratios will need to be adjusted to take this into account.

10. Indirect/remote supervision

Young people must be supervised throughout all visits. There are certain times where pupils maybe 'remotely supervised' by a member of staff or other responsible adult, e.g. DofE expeditions, 'down time' in a shopping centre, nighttime etc.

Risk assessments must detail when remote supervision will be part of the visit.

The OEAP also provides comprehensive guidance to schools regarding supervision. This will help you ensure you have the right procedures in place.

See Section 29 OEAP Links.

11. First Aid and Medical Conditions

It is good practice for a first aider (e.g. Emergency First Aid/ First Aid at Work (FAW) qualification) to be included on educational visits, this can help to ensure that first aid (if required) is promptly administered. As part of visit planning, the group leader must make a judgement on:

- The level of first aid required, e.g. considering the number of pupils travelling, medical conditions, the location, type of activities, etc.
- The extent to which the group will be isolated from the support of the emergency services (both in terms of distance and response time).

If a first aider is not part of the visit, consideration must be given to where first aid will be accessed if required and first aid controls measures must be recorded in the visit risk assessment.

Where a young person at known risk of anaphylaxis accompanies a school visit, the leadership team should be familiar with the Department of Health “Guidance on the use of adrenaline auto-injectors in schools” available at:

[Guidance on the use of adrenaline auto-injectors in schools](#)

Procedures must be put in place to meet the requirements of this document.

A ‘suitably stocked’ first- aid kit should be available for all visits.

It is a legal requirement for public service vehicles. The first aid requirements relating to EYFS settings are also specified and must be adhered to.

See [EYFS Statutory Framework](#)

Sunburn

Schools should have a clear policy in place for trips where sunburn is a risk. This should cover; ensuring pupils self-apply cream, and what arrangements are in place for non-compliance. This is especially important for older year groups on overseas visits, where there is a clear intention to return with a “tan.”

Where the staff feel the pupil is not using sun protection, it would be advisable to consider more shaded activities for them. Risk assessments will need to cover the risks around the sun and what control are in place for non-conformity.

Self-Harm

Where a pupil is at known risk of self-harm or indicates this is a risk, this will not prohibit them attending the visit by default. A risk assessment should be undertaken where advice from other agencies (if available) is considered about the risk during the visit.

Where a pupil indicates they intend to self-harm on a visit, then it would be appropriate to consider removing them. On other occasions where the self-harm is more home focused and there is no indication it will be undertaken whilst under the school's care, the pupil may be considered safe to travel with the group; with some adaptations to their room to remove any risks, agreements on staff holding onto certain items etc.

Advice should always be sought from medical professionals where possible in advance of any visit.

Medical conditions

Planning arrangements for visits and activities should be sufficiently flexible to support the inclusion of participants with medical conditions, unless evidence from a clinician states that this is not possible.

There are legal duties placed on schools to make arrangements to support pupils with medical conditions. This includes school trips.

In meeting this duty, establishments must have regard to the following statutory guidance.

<https://assets.publishing.service.gov.uk/media/5ce6a72e40f0b620a103bd53/supporting-pupils-at-school-with-medical-conditions.pdf>

To ensure appropriate arrangements are in place to ensure the child's safety on an educational visit, the school may need to carry out an individual pupil risk assessment.

Where a school feels there is too much risk for the pupil to attend and the pupil/parents are not in agreement, a doctor's note setting out the pupil's fitness to travel and undertake the listed activities (with or without restrictions) should be in place, before the pupil is included on the visit.

The LA does not need to see documentation that contains pupils' personal medical/behavioural information to approve visits. Simply confirming on the 'school' own risk assessments or on the visit form, that individual pupil risk assessments have been completed, will be sufficient.

Where schools wish to add them to a visit form, they must be mindful of GDPR and ensure that their Evolve account is restricted to only staff that have a legitimate reason to view such information.

The OEAP provide further guidance on supporting the inclusion of participants with medical condition. See Section 29 OEAP Links

12. Insurance

It is the responsibility of the Head Teacher/Governing Body/Service Manager to ensure they have appropriate travel insurance to cover all aspects of educational/off site visits. Any queries regarding the suitability of your insurance cover should be addressed directly with your insurance provider. Please note the LA cannot give any advice regarding RPA insurance.

Schools should be wary of any insurance waivers they are asked to sign on behalf of pupils for injury or negligence due to undertaking the activity. Where a provider (especially those without AALA or LOTC credentials) insists on waivers, advice from your insurance provider should be taken in advance of the visit.

13. Transport

Private Cars

Transporting young people in private cars requires careful consideration. This mode of transport must also be approved by the Head of Establishment and processes recorded and communicated. Procedures could include gathering:

- Evidence of a valid insurance policy covering the intended use, e.g. business use,
 - Evidence that the vehicle is roadworthy. e.g. valid MOT certificate where relevant,
 - Proof that parental consent has been obtained to transport pupils in staff private cars,
 - Information to show staff/drivers fully understand their duty of care in this situation.
- (Including correct installation/use of child restraints/car seats).

Coaches

Coach selection is an important part of a journey. You may want to consider the following to help you do this:

- Does your establishment have an existing, satisfactory relationship with a provider? Do not underestimate intuition – if your establishment has used a provider before and always felt safe, listened to, and well cared for then this is a good reason to use them again.
- Can the operator cope with any special needs your group may have? how will they do this?
- Are the seat belts appropriate for your group and is there, if necessary, appropriate access and securing facilities for a wheelchair?

- Where a provider has a fleet of coaches of varying sizes and standards, confirm the specific standard or vehicle you require.
- Ensure the chosen coach company will not subcontract to another company without your agreement.
- Check Operator licences. <https://www.gov.uk/check-vehicle-operator-licence-applications>
- Confirm DBS, public liability and employer liability insurances

Minibuses

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

Combined Department for Education and Department for Transport provide clear advice on when a school employee with a car driving license may drive a minibus and when a Section 19 permit might be required.

Schools must ensure that this guidance is followed, and relevant checks are made to establish the procedure is followed.

[Driving school minibuses: advice for schools and local authorities - GOV.UK](#)

Staff can confirm details of the vehicles they can drive and/or share with their employer by using the link provided by government online (Gov.uk)

<https://www.gov.uk/view-driving-licence>

Minibus drivers cannot safely drive and supervise passengers at the same time.

Therefore, a judgement should be made about the likely behaviour and individual needs of the passengers. If any of the passengers may require close supervision, one or more responsible adults should travel in the vehicle as escort(s), so that the driver is not distracted.

In determining the staffing necessary to ensure effective supervision, establishments should consider the factors that might influence the safety of the driver and passengers.

These factors include:

- the length of the journey and time of day it takes place.
- the route and the familiarity of the driver with this route.
- the nature of the group (e.g., age/maturity/special needs/behavioural issues) and the level of support they are likely to require during the journey.
- the seating arrangements (including whether there should be adults seated next to emergency exits)
- the need to ensure that all passengers wear seat belts.
- the overall workload of the driver during the day (other responsibilities and duties undertaken or planned by drivers).

14. Weather, Clothing & Survival

Where appropriate, the visit 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, age, and ability of the party
- The nature of the visit and environment.

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

- Comfort, insulation and shelter for a casualty and 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),
- Sun cream.

Certain activities e.g. Duke of Edinburgh may require visit leaders to take additional safety / rescue or survival equipment. This should be considered as part of the visit risk assessment.

Visit leaders must have the confidence and ability to identify circumstances where it may be necessary to modify or change the visit or activity (implement Plan B) to suit changing situations, or additional risk e.g. inclement weather, rising water levels, accident, or incident etc.

The OEAP provides guidance on weather, clothing, and other considerations specific to trip types. See Section 29 OEAP Links.

15. Using an External Provider

There are many external providers in the UK and abroad offering/providing a range of adventurous activities, instruction, and supervision, for example:

- Activity Centre, e.g. PGL
- Educational Tour Operator (offering skiing, tours, historical sites, and other opportunities)
- Overseas Expedition Provider.

The decision to use an external provider is the responsibility of the visit leader, EVC and Head of Establishment. To help schools/establishments confirm that the provider has suitable systems and procedures in place they must ensure that the Provider holds an LOtC Quality Badge, an AALA Licence **OR** a 'Provider Form' has been satisfactorily completed by the provider.

15.1 For Providers that hold a current LOtC Quality Badge and/or an AALA Licence

The visit leader should not risk assess activities delivered by an external provider, it is the provider's responsibility to do this.

However, visit leaders should:

- Confirm risk assessments are in place for the; activities completed by students, location/premises, and where the provider is responsible for the travel arrangements. Also consider first aid cover, fire safety etc.
- Establish the times during the activity when school staff would be responsible for student care/safety (so they can risk assess those elements)
- Ensure that they are aware of the roles of staff accompanying the trip whilst the activity sessions take place.

[Check an AALA License holder](#)

[Check an LOtC Badge](#)

15.2 For Providers that DO NOT hold an LOtC Quality Badge and/or an AALA Licence

A provider form will help you confirm that the company you are using to provide services on a trip/visit has health and safety procedures / risk assessments in place.

Procedure

1. Download a [Provider Form](#) from EVOLVE. Found under the 'Form' tab in 'Resources.'
2. Complete the top section.
3. Send the 'Provider Form' to the provider (email, fax, post).
4. On its return, check that it has been satisfactorily completed.
5. Keep Provider Form on file together with all other relevant documentation.
6. Attach the Provider Form to EVOLVE.

Follow the guidance in section 15.1 regarding the risk assessment of activities.

16. Emergency Procedures

Schools/establishments should ensure emergency procedures are in place and documented within their educational visits policy.

OEAP provides guidance to schools to help them develop their offsite Emergency Procedures. See [Section 29 OEAP Links](#).

In an emergency, if it is not possible to reach any of the designated establishment emergency contacts, the leader should call the crisis line:

01204 332240	Office Hours
01204 336900	Outside Office Hours

[Emergency planning and response for education, childcare, and children's social care settings - GOV.UK](#)

17. Water- Margin Activities

Water-margin activities are those that take place near or in water such as such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow water (knee deep).

Whilst LA approval is not required for such activities it is important that there are enough competent leaders to provide effective supervision for the group, the planned activities and the environment visited due to risks of pupils (especially younger children) falling into the water. The school will also need to ensure that leaders have the right skills, experience, and attitudes to work in or near water.

Please note activities that involve swimming (except public lifeguarded pools), and water-based activities will require LA approval. and additional safeguards will need to be in place. Separate sections provide guidance on Water Based activities and Swimming.

Staff involved in water-margin activities should be familiar the guidance contained within the OEAPS' document "Group Safety at Water Margins". See [Section 29 OEAP Links](#)

18. Residential Visits

Residential visits require approval by the LA and must be submitted to the team at least 4 weeks prior to travel.

As part of visit planning, visit leaders must ensure accommodation is suitable for all pupils and staff.

In most cases accommodation will be simple to assess via online information. Where this is not available, further checks of suitability may need to be made before the visit.

Accommodation should be selected with a view to restricting access to and by other users (public), separation of pupils by gender and overnight security from both access in and pupils attempting to leave without permission.

Schools should endeavour to have appropriate staff (M/F) for overnight issues where possible.

On arrival pupils/staff must be made fully aware of the establishment's emergency evacuation plan and should complete a "walkthrough" of the evacuation route.

If staff or pupils need support in the event of an evacuation a Personal Emergency Evacuation Plan (PEEP) must be developed and shared with relevant persons.

18.1 Sleepovers on school premises

Where the school has an overnight sleepover on site, the visit is treated as a residential visit and as such, LA approval is required.

Risk assessments should cover both overnight supervision/safeguarding levels and also the schools fire procedures in the event an evacuation may be required.

19. Overseas Visits

Overseas residential visits require approval by the LA and must be submitted to the health and safety team at least 4 weeks prior to travel.

A key resource for planning and risk assessment is the UK government's foreign travel advice, available at www.gov.uk/foreign-travel-advice.

This covers safety and security, local laws and customs, entry requirements, health, natural disasters, money, and help and support. It should be checked in the early stages of visit planning and then at regular intervals and immediately prior to leaving.

All relevant Foreign, Commonwealth & Development Office (FCDO) information must be shared with staff accompanying the visit.

An overseas visits template RA is provided on Evolve to assist schools. This covers the most generic hazards for such trips. The schools own risk assessments will need to include

all applicable hazards, and any specific hazard identified for the visit location/country. Uploading an itinerary will enable the LA to ensure all aspects have been assessed.

For overseas visits to well-known locations and popular tourist areas, completion of General Planning' risk assessments ' , Travel' risk assessments and the overseas visits template may suffice.

Where overseas visits are to more remote locations such as to countries outside of Central Europe/North America, or have risks due to the activities (safari, mountains, trekking, quad biking etc.) Schools will need to undertake additional detailed assessments for these activities.

Schools should be mindful that Health and Safety legislation is different outside of the UK and standards vary significantly. This means it is difficult to carry out checks on providers and assess competence fully. Note: The LA cannot assess on behalf of the school.

Visit leaders will therefore need to be assured that any activities are properly planned and low risk to avoid accidents and emergencies and the need for medical attention.

The school's insurer will also need to be made aware of any higher risk activities planned when booking them overseas.

The OEAP provides further guidance on visits to overseas countries and includes amongst other things information on planning, leader/staff competence, preparation for staff, young people and parents, visas, and passports, 'travel, transport and driving,' and accommodation. See [Section 29 OEAP Links](#).

20. Swimming

The use of a pool should be clearly identified as part of your visit planning, never a spontaneous decision. Swimming activities and venues must be included within the visit risk assessment and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example a hotel pool may be on site.

Staff would need to confirm:

- Pool risk assessments are in place – including supervision/lifeguarding.
- Level of lifeguarding offered; qualifications held by staff.

Where there is no lifeguard on duty the head of establishment/ visit leader will be fully accountable and responsible for ensuring relevant guidance is followed, information from the venue is gathered and the activity risk assessed this information must be added to EVOLVE and LA support requested.

For trips to venues without a lifeguard schools should consider having a staff member trained for the National Pool Lifeguard Qualification (NPLQ)

[National Pool Lifeguard Qualification \(NPLQ\) | Lifeguard Course by RLSS UK](#)

The OEAP provides guidance relating to both supervised and unsupervised swimming along with the hazards that should be considered as part of your risk assessment.

See [Section 29 OEAP Links](#).

Natural Water Bathing

Bathing in a natural setting such as a river or lake, or the sea, should always be a robustly structured activity. This may be by reference to a pre-planned risk assessment and corresponding operating procedure, or it may be by making a more spontaneous plan, either of which should be reinforced by careful observation and judgement at the time. As with any activity, the leader must be clear that participants are not exposed to any significant risks. The pleas of participants to be allowed to bathe (e.g., because it is hot weather) must never be allowed to over-ride the leader's judgement of the situation.

Taking young people on a visit to the seaside or other open water in good weather, and then not allowing them to at least paddle or cool off in the water if it is safe to do so, is unreasonable and inappropriately risk averse. A balanced approach will ensure that the risks are properly managed so that young people are given these opportunities. A balanced approach will ensure that the risks are properly managed so that young people are given these opportunities.

Where swimming in open water is planned such as the beach, the visit leader will be required to know the pupils swimming ability in full. A template form for swimming ability is on Evolve under the 'Resources- Risk Assessment' section.

High levels of constant supervision will be always required. in addition to lifeguards on duty. Ratios of pupils in the water should be kept low.

The OEAP provides guidance on the factors that should be considered if planning to carry out Natural Water Bathing. Visit leaders should also be aware of guidance for Water Margin Activities. See [Section 29 OEAP Links](#).

Aqua Parks

Aqua parks are usually inflatable equipment that is located on a body of water (Off beach, in lake etc.) They are not to be confused with those contained within theme parks where prebuilt slides and such are the equipment used.

A series of incidents, including fatalities have occurred on Aqua Parks where the provider was found negligent.

Schools are therefore advised to carefully consider whether a visit to an Aqua Park is beneficial.

Due to their recent introduction to the UK, Aqua parks are not currently a licensable activity, and operators therefore do not require an AALA license.

A provider form must be completed, and the visit should be set as an adventurous activity on Evolve.

Only parks that have gone through the Royal Life Saving Society UK (RLSS UK) accreditation scheme should be considered.

<https://www.rlss.org.uk/aqua-parks>

The Aquaparks Association provides further advice on selecting an aqua park and the standards that should be in place.

21. Definition of an ‘adventurous activity’

Activities defined as Adventurous

The following activities are examples of adventurous’ activity which should be sent to the LA to review so we can provide advice/guidance relating to the risk management of your trip. This list is not exhaustive and if you think that your activity is adventurous, and it is not listed below then please contact the team or the relevant professional body.

Climbing:	Rock climbing, abseiling, ice climbing, gorge walking, ghyll scrambling, indoor climbing walls, Coasteering/coastal scrambling, sea level traversing, high- and low-level ropes courses
Water sports:	Canoeing, kayaking, dragon boating, wave skiing, white-water rafting, improvised rafting, sailboarding, windsurfing, kite surfing, snorkel and aqualung activities, boating (excluding commercial transport) and activities with the use of powered safety/rescue craft. Swimming, all forms, except publicly lifeguarded pools. Aquaparks.

Trekking:	Hill-walking, mountaineering, fell-running, orienteering, pony trekking, off-road cycling, and off-piste skiing
Caving:	Caving, potholing, mine exploration
Challenges and Skills:	Archery, shooting, quad bikes, assault courses, camping, snow sports (skiing, snowboarding, and related activities, including dry slope), air activities (excluding commercial flights), motor sport and all forms of extreme sports

Activities not defined as Adventurous

For the purposes of LA review, the following activities may not be regarded as adventurous (dependant on the extent of the activity and your risk assessments). 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 17.
- Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

Other

Ice Skating

The LA does not consider ice skating on an ice rink to be an adventurous activity and therefore does not require LA approval. We would however suggest schools carefully consider the merits of this activity because we have received many accident forms reporting pupils sustaining fractured limbs related to ice skating.

Trampoline and Inflatable Parks

Schools do not require approval for visits to trampoline and inflatable parks.

However there have been several well publicised accidents at these venues which have resulted in life changing injuries. Unlike domestic trampolines where most injuries occur from falling off, trampoline park injuries occur through landing awkwardly on the trampoline surface or colliding with other users. Inflatables set up outdoors have also blow away resulting in tragic outcomes and there have been fatalities from inflatables exploding. Whilst the LA does not prohibit visits to trampoline and inflatable parks, school are advised to carefully consider whether this activity is best left for those parent/guardians who choose to do so, to take their children to such venues.

The OEAP also provides specific advice on visit to Trampoline Parks.

See [Section 29 OEAP Links](#).

For any queries on whether an activity is adventurous or not, please speak to the LA.

22. Approval of staff to lead an adventurous activity

Procedure for obtaining approval

If establishment staff are to lead adventurous activities, then it is essential that they are properly assessed as competent to do so. The Head of Establishment is responsible for confirming competence to lead as they are accountable. Staff wishing to lead an adventurous activity must provide details of relevant experience/training/qualifications along with full details of the proposed activity. The Head teacher/EVC must be confident that they have sufficient competence to lead the activity before submitting the trip/activity to the LA. Approval should never be assumed but must involve professional judgement. The Head/Manager or EVC (when the responsibility is delegated) must make a judgement about the suitability of that person to lead that group on that visit/activity in that environment.

OEAP guidance can help you determine if your staff have relevant qualifications/experience, or you may need to speak to the relevant awarding body.

The OEAP provides further information about 'approval of leaders,' 'qualifications to lead adventurous activities,' and FAQ's. See [Section 29 OEAP Links](#)

Details of your assessment/approval and scanned copies of all relevant qualifications (e.g. instructor certificates, first aid, etc.) must be uploaded onto EVOLVE. Approval for any visits which are classed as "adventurous/staff led" will not be given without the Head of Establishments formal approval being in place on EVOLVE.

A step-by-step guide how to gain Leader Approval is held on evolve, under the resources, section named "Validation of staff awards." This describes how to complete the Leader Approval criteria. The LA will give final approval for the activity to take place and will acknowledge the approval given for the individual to lead trips.

23. Water-Based Activities (Water Sports)

Water based activities are considered adventurous activities. Examples of water-based activities can be seen in the section 'Definition of an 'adventurous activity.'

For clarification on the difference between water-margin and water-based activities see also [Section 17](#).

UK providers of water- based activities should hold a relevant licence (AALA)

The activity leader must establish the level of water confidence for all participants prior to starting any water-based activity.

Participants who lack water confidence may still be able to take part subject to discussion with the provider and risk assessment/approval from the Head teacher.

If a member of staff wants to lead this type of visit, they must seek approval.

See [Section 22](#).

The activity must be fully risk assessed and if required personal buoyancy provided.

The school must provide sufficient information to parents on the nature of the activity.

24. Walking activities

For the purposes of EVOLVE, walking activities should be submitted to the LA if they are above 300m, or more than 1km from vehicular access. However, this is a subjective boundary and there may be occasions where Head teachers, EVCs or the visit leader may ask the LA to review a walking activity prior to it taking place. This may be due to risk or an individual's medical needs. In this case the school/establishment may be asked to provide or gather further technical advice.

Where the establishment's own staff intends to lead an open-country activity: the Visit Leader must seek approval from the head teacher providing full information of experience and qualifications including providing certificates. The EVC/head teacher must speak to the awarding body to confirm the qualifications are relevant and suitable for the route/activity. In many cases the awarding body will state that the visit leader must also hold a suitable/valid First aid certificate. This information should also be submitted to the LA.

Governing Bodies <http://www.mountain-training.org/> or <https://www.thebmc.co.uk/>

25. Snowsports

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

The LA expects establishments to follow OEAP guidance regarding the planning, organising and delivery of any snow sports activity. Specific advice regarding staff qualifications and competence must also be followed. Head teachers must complete relevant checks to ensure staff have the ability to organise, and if appropriate instruct, lead and supervise.

A note of caution: - off-piste activities can be a very dangerous activity. People should never go on virgin slopes with avalanche risk. Off-piste activities must be risk assessed by the ski school and professional instructor at the time to determine if it is safe.

Previous similar experience is advised.

Schools must check any liability waivers with their insurers before submitting a visit.

The OEAP provides further guidance on how schools should plan Snowsports.

See [Section 29 OEAP Links](#).

26. Contacts

Health and Safety Team	01204 336968 chst@bolton.gov.uk
Bolton Council Insurance Department	01204 331515
LA Emergency Out of Hours Contact Number	Security and Response 01204 336900

27. OEAP Links

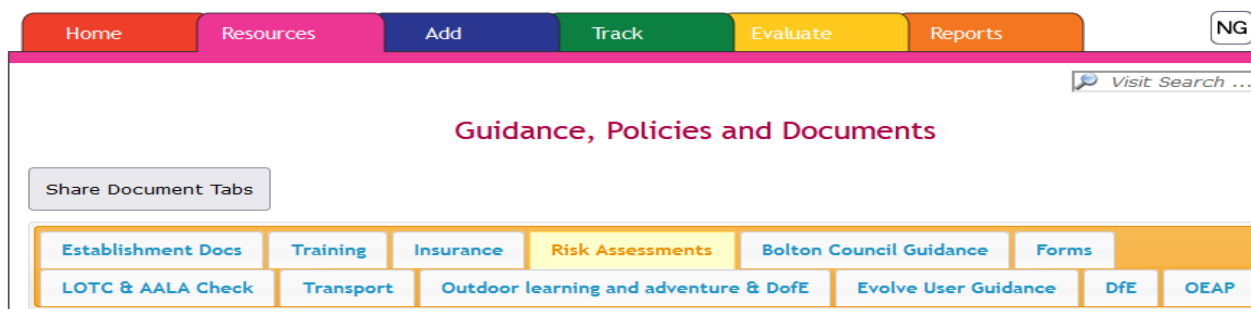
Heading Title	OEAP Link
Role of the Head teacher/Head of Establishment	Role of the Headteacher
Role of the Educational Visits Coordinator	Role of the EVC
Role of the Group/Visit Leader	Role of the visit leader

Visit Planning, Plan Bs and Inclusion	Planning Checklist
Preliminary Visits and Visit Safety	Using external providers
Staffing and Supervision	Ratios and Effective Supervision
Indirect/remote supervision	Group management and supervision
First Aid and Medication	Medication
Weather, clothing, and survival	Weather and group safety
Emergency Procedures	Emergencies and Critical Incidents
Water-Margin Activities	Group safety at water margins
Swimming	Swimming pools Natural water bathing
Definition of an adventurous activity	Trampoline parks
Approval of staff to <u>lead</u> an adventurous activity	Approval of leaders Adventure Qualifications FAQ's Adventure Activity qualifications
Snowsports	Snowsports
Overseas Expeditions	Overseas Expeditions

28. Evolve: Key Guidance

Most user/support information is held on the Bolton Council Evolve system.

[Evolve Login](#)



All Heads and EVC's should be aware of the guidance and requirements that are contained within the 'Resource' section of the system. Users will also find guidance for specific activities and qualification standards for staff providing higher risk activities.

When schools use the councils evolve system for visit planning, they agree to follow the procedures the H&S team have in place for effective visit management and safety planning.

The main criteria for a visit to be approved is as follows: -

- The visit is sent with at least 4 weeks' notice of the visit date.
- The EVC and Head have checked that all information required is present on the visit form, risk assessments covering all hazards are completed, and additional information such as itineraries and letters to parents are attached.
- The correct risk assessment is completed for the visit (e.g. school minibus is used to transport pupils, but a coach risk assessment completed in mistake)
- Supervision ratios are appropriate and not very low (e.g. only 1-2 staff members)
- Requests from the LA team for clarification or additional information has been actioned without delay.

Note, for most visits the template risk assessments found in the **Evolve 'resources area'** for travel, planning and accommodation will be sufficient, if completed correctly.

Visit not approved

The main reasons a visit will not be approved: -

- The visit is sent within 5 days of the visit start date, without prior agreement with the LA Health, Safety and Wellbeing Team. (These visits will be processed without being reviewed.)
- A request for information or additional risk assessments from the LA has not been actioned.
- A request to revise a risk assessment is not actioned.

If your visit is not approved, it will be “processed” by the LA.

A processed visit means the LA cannot approve the visit as their requests were not met, or there was insufficient time to review it.

This does not prevent the visit from taking place, it means the decision to undertake the trip is for the Headteacher to make, without the support of the LA.

LAV (Local Area Visits)

These types of visits are local to the school, undertaken often where full knowledge of the location and activities are known by staff (e.g. park visit, local church visit, library, venues within walking distance, local activities done within core school hours etc.)

These should normally be visits within Bolton boundaries and not leaving the borough.

Full guidance can be found on **Evolve** when “Add Visit” is chosen. This feature added in 2024 allows schools to use a much shorter version of the full visit form for lower risk, local activities that do not require approval above EVC level.

The guidance document **must** be read by Heads and EVC’s, as the expected procedures to use this feature and maintain good safety management are within this additional guidance.

Where Heads choose to use this option, the school must enable “approval” before creating any LAV visits by following the instructions in the LAV guidance document.

Note, if this option is not chosen, no notification of staff taking pupils on a local visit will be made and the Head and EVC will not be aware of it.

Evolve +

Evolve + allows schools further options for parental consent and other financing packages.

This feature is typically more beneficial to secondary and larger schools undertaking many visits every year.

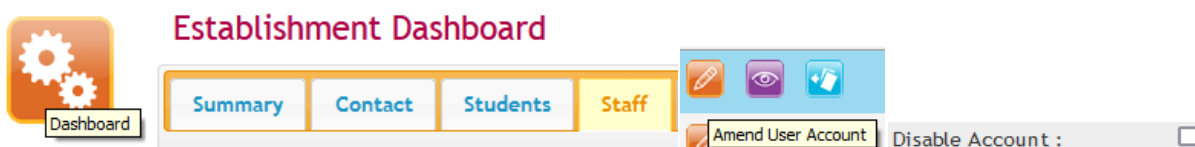
There is an additional charge for this feature. Please contact the LA for further details and cost.

Note: The LA cannot offer any support (advice or technical support) for this add-on to the system, and support will be required to be sought directly from Edufocus (Provider of Evolve)


Adding and removing staff

Any EVC or Head can add, remove, and amend school staff, only Head and EVC account require the LA to make changes to these roles.

To remove staff, click the orange cog to open the dashboard, then staff, then the 'pencil' icon next to the user's name, then click in the box to disable the account.



To add new staff, click the orange cog to open the dashboard, then staff, then

click the plus sign  above the staff list of names.

Then populate the form that appears and click continue.

If schools have any queries about the content of this document please contact the Health, Safety and Wellbeing Team by phone or email.

01204 336968

chst@bolton.gov.uk