



Edsential Policy for Educational Visits and Offsite Activity

February 2025

Edsential follow OEAP National Guidance - The professional association for outdoor education advisers and educational visits advisers

Statement from OEAP

As the lead body for guidance, advice and training related to outdoor learning and educational visits in England and Wales, the OEAP supports members in their work with schools and services to children and young people.

This policy is linked to the following documents:

- DfE Health and Safety: Advice on legal duties and powers 2014
- DfE Health and Safety on Educational Visits 2018
- Health and Safety Management Arrangements for First Aid
- Health and Safety Management Arrangements for Accident Reporting
- Health and Safety Management Arrangements for Risk Assessments
- The Administration of Medicines in Schools and Early Years Setting
- Safe Practice in Physical Education and School Sport (afPE 2024)
- Safeguarding Policies and Procedures KCSE 2024
- Health and Safety of Schools on educational visits - HASPEV 2014
- School Trips and Outdoor Learning Activities (HSE)
- AAL Regulations 2004
- High Quality Outdoor Learning 2025

And should link your

- Your Employer's Health and Safety Policies
- Your School Framework Health & Safety Policy

Edsential Policy for Educational Visits and Offsite Activity

1. Introduction

This Policy document is for all schools and Youth services that have entered into a service level agreement with Edsential to provide the Educational Visits Advice and Guidance service. and for schools and Youth Services where the Local Authority has commissioned Edsential to act on behalf of the Employer.

Voluntary Aided, Foundation, Academy, Independent, Free schools and Youth Services should produce a Policy Statement that outlines their intention to adopt Edsential's Policy and Guidance documents. A summary of the service is detailed below:

The Edsential Learning Outside the Classroom team (LOtC), will provide:

1. Advice and support on all aspects of the Educational Visits process.
2. Establishment access to the Edsential EVOLVE website for Educational Visits.
3. An online advice and notification procedure with approval procedure for specific educational visits to check that arrangements reflect Edsential/Employer guidance and current best practice
4. Access to a range of training courses, some of which may be subject to an additional charge. Further details can be found on your Service Level Agreement.

Edsential Policy and Guidance for Educational visits and offsite activity.

The Policy and Guidance on Educational Visits and Offsite Activity applies to all educational establishments where the Council is the Employer.

In Establishments where the Council is **not the Employer** (for example Voluntary Aided, Foundation, Academy, Independent and Free schools) this policy is provided as an example of good practice. These schools/organisations should adopt their own Employer Guidance Policy Statement. Councils do not assume the responsibility of the Employer for Voluntary Aided, Foundation, Academy, Independent, Free schools, and wider youth organisations.

Every year thousands of children and young people from schools, Children and Young People's Departments and voluntary sectors participate in educational visits and off-site activity as part of their educational experience or personal development. These activities and opportunities are integral to a rounded educational experience which excites, challenges, motivates and stimulates learners.

This policy sets out how Edsential will manage this aspect of learning. For maintained schools Edsential are supporting the Council's requirements and responsibilities for educational visits. The policy will include health and safety requirements.

2. Definitions

Adventure Activities: Activities that may take place in challenging environments that can present technical or environmental complexity in the organisation or delivery of the activity. Many adventure activities have well established National Governing Bodies that train, assess and validate the competency of staff to lead in the activity.

Educational Visits: All visits with a group of young people that leave a school site to journey to another location either during the school day or for extended periods beyond the school day. This usually does not include work experience or activities in schools on split sites. This activity is planned and organised by the school.

Off-site Activities: Activities that occur away from the base of regular work with children or young people, organised by staff who work within Children's/Youth Services.

Learning Outside of the Classroom (LOtC): An activity that takes place on the school site and further afield. Some of this work falls under the category of educational visits.

Children and Young People: All young people under the care of Children's Services whether from a school or setting.

Staff: In the context of this policy, staff are defined as any employee/ registered volunteer of the school, or youth establishment.

3. Application

This policy applies to any of the following activities when undertaken by young people under the supervision or control of staff.

- Off-site activities, visits, or excursions
- Activities that fall within the remit of Learning Outside the Classroom
- Adventure Activities
- Residential visits

This policy applies to activities that take place within or outside of normal working hours, including weekends and holiday periods. Edsential and LAs have formally adopted Outdoor Education Advisor Panel (OEAP) 'National Guidance' as the source guidance for this policy from the website: www.oeapng.info

It is a legal expectation that employees must work within the requirements of their Employer's Guidance. Where there is any variance of policy between the National Guidance and local policy, this Policy Statement sets out Edsential's requirements. Where Employers guidance differs from National Guidance, Employers Guidance takes precedence.

Where an employee commissions LOTC activity they must ensure that this commissioned agency meets Edsential's requirements.

Planning, notification, approval, monitoring, and evaluation of all visits

This is carried out through the Evolve system. Evolve enables Edsential to check, provide guidance, approve (if approval is provided), monitor, evaluate and audit Adventurous, Residential and Overseas Visits.

All other visits do require approval from their Establishment. It is highly recommended that all other visits are entered onto EVOLVE in order to support Establishments with the planning, processing, monitoring, and evaluating of visits.

Activity	Authorisation Required and Minimum Time Frame
Local Area Visits	EVC/Head of Establishment Authorisation
Off-site non adventurous – non residential visits	Head of Establishment Authorisation
Residential in UK / Overseas	Edsential Authorisation <u>20 working days (term time) in advance of activity to Edsential</u>
Adventurous Activities	Edsential Authorisation <u>20 working days (term time) in advance of activity to Edsential</u>
Overseas Expeditions and overseas visits not delivered by an LOTC quality badge provider	Edsential Authorisation Edsential to be involved in the planning stages and final submission must be submitted <u>20 working days (term time) in advance of activity</u>

Edsential have the discretion not to check or approve visits that are not submitted in the correct time frame. Schools can request late visit forms to be reviewed to ensure they meet Health and Safety requirements. This will be at the discretion of Edsential and an additional fee may be charged. Further details can be found on your SLA.

Any requirements or recommendations will be noted on the visit form. If these cannot be met Edsential will process the visit form rather than approve it.

Undertaking a visit that has not been approved by Edsential may affect your insurance.

4. Policy Statement

Edsential recognises the important role that educational visits, off-site activities, adventurous activities and Learning Outside the Classroom (LOtC) plays in providing a rich and rewarding education for children and young people irrespective of age, ability, or circumstances.

Edsential actively supports and encourages such activities and recognises that this may involve exposing participants to challenges and risks with which they may not be familiar. Edsential supports establishments in the planning of the visit and to help identify and manage the risks against the benefits of the activity. It is Edsential's policy as far as is reasonably practicable that all activities falling within the scope of this policy should:

- Comply with recognised sector best practice guidance with respect to issues falling within the scope of this policy. For the purposes of this policy this signifies compliance with the National guidance issued by the Outdoor Education Adviser's Panel (www.oeapng.info) unless this guidance is specifically over-ridden by a requirement within your Employers Health & Safety Policy.
- Be allocated sufficient resources (time, planning, staff, and budget) to enable activities to be undertaken safely.
- Follow a Risk Management process that is informed by a Risk Benefit Assessment where the benefits of the proposed activity are balanced against the risks. Detail is to be included on how the risks will be managed. There may be some background or residual risk elements remaining and these could be viewed as acceptable. Part of the curriculum and learning for young people is to know how to identify and manage appropriate risk. Where risks to participants are viewed as unacceptable then the activity should not be carried out until further advice has been sought from Edsential's LOtC Team.
- Be monitored to satisfy Edsential that the requirements of this policy are being met.

5. Third Party Providers (Internal and external)

Where activities that fall within the scope of this policy are being provided by a third party, Edsential will require that:

- Reasonable checks of any external organisations that are contracted to provide any activities, regardless of whether these activities are being undertaken on or off-site, these are carried out to ensure that the external organisations are suitably trained, qualified and competent to provide such activities. These checks also need to ensure that the external provider holds appropriate public liability cover. (Edsential is owned by Wirral and Cheshire West and Chester Local Authority who recommend £10 million for Adventurous activities)
- Checks are made via an external validation process which may include the Adventure Activities Licensing Authority (AALA), the LOtC Quality Badge (LOtC), and National Governing Bodies.
- Where the provider does not hold the LOtC Quality badge the school/establishment will need to ensure the provider has completed an external provider form.

- The performance of external organisations should be adequately monitored whilst engaging in activity to ensure that agreed practices are being met.
- The significant findings of monitoring are acted upon and reported to the LOtC Team and/or Governing Body of the school.

To secure the policy objectives Edsential LOtC Team will put arrangements in place to:

- Establish and maintain systems and procedures, to enable schools and settings to comply with the requirements of this policy. All schools and settings will be required to record and manage activities falling within the scope of this policy using the Evolve online system. The Evolve online system should be used for any off-site activity or onsite residential or adventurous activity.
- Provide advice to support staff with responsibilities for any aspect of this policy to meet any requirements placed on them.
- Provide written guidance and procedures for staff to support them to fulfil their responsibilities within the scope of this policy.
- Provide access to suitable and sufficient information and instruction and training for all staff who organise, facilitate, lead, and advise on such activities.
- Establish structures to enable the reporting of any significant findings of monitoring activity (e.g., incident reports) to the Council's senior executives or schools' management boards.
- Carry out monitoring within the cohort of the schools that we support

6. Organizational Responsibilities and Arrangements

In addition to the overall Edsential's Educational Visits Policy some specific responsibilities apply in relation to the activities covered by this policy. These are identified in 6.1 - 6.7 of the policy document.

6.1. The Employer

The Employer is responsible for the following:

- Ensure that staff are trained and competent to carry out their role.
- Allocate sufficient resources to ensure that adequate competent advice is available to provide advice, guidance, and support to Establishments. This is the case when activities fall within the scope of this policy, in order to meet this requirement.
- Ensuring that the requirements of this policy are adequately monitored and that appropriate actions are taken to obtain compliance with the requirements of this policy. This is carried out using Evolve (or alternative management system). Evolve enables the LOtC Team to check, approve (if approval is provided) monitor, review, and audit Adventurous, Residential, Standard Overseas and Major Overseas Visits.
- Reporting significant failings in this policy to the appropriate senior officer so that they may give direction; and if required, resources to ensure compliance with relevant legislation, Local Authority Policy and Guidance, National Guidance, and Industry Best practice to maintain effective oversight of day-to-day health and safety compliance.

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6.2. Edsential LOtC Team

Responsibilities of the Edsential LOtC Team are highlighted below:

- Maintain their competence and keep abreast of legal requirements and sector and industry best practice with regards to activities covered by this policy.
- Report significant changes to legislation, LA Policy and Guidance, National Guidance and sector and industry best practice to appropriate key stake holders such as Headteachers, Head of Establishments, Governor Bodies, Trustees, and Educational Visits Coordinators.
- Provide advice and guidance to schools and settings to support activities to be carried out safely.
- Monitor schools and settings to ensure that they are complying with all relevant legislation on the conditions set out within this policy.
- Report the significant findings of monitoring including any recommended corrective actions to the appropriate bodies which may include: Headteachers, Head of Establishments, Governing Bodies, Trustees and Educational Visits Coordinators, HSE, CLOtC, and the Council's Risk and Insurance Management Team so that they can discharge their duties in accordance with this policy.

6.3. Governing Bodies/Trustees

Governing Bodies/Trustee should satisfy themselves that the school has suitable policies and procedures in place, to adequately manage and monitor all activities falling within the scope of this policy. The results of monitoring should be discussed at Trustee/Governing Body and Headteacher Senior Leadership Team meetings.

6.4. Headteacher/Head of Establishment

Additional reading to be read in conjunction with this guidance <https://oeapng.info/head-manager/>

The Headteacher/Head of Establishment is responsible for ensuring that any activities falling within the scope of this policy are:

- Adequately resourced (in terms of planning, time, staff, and budget) to secure compliance with the requirements of this policy and any associated procedures.
- Notified using the Evolve system to the Edsential's Education Visits Advisor where required under the terms of this policy. Please refer to Section 3 'Approval of Visits' on of this Policy and Guidance document.
- Ensure visits are led by suitably trained, qualified, competent and confident people.
- Checked comprehensively. if external organisations and third-party providers are providing the activity, the Headteacher/Head of Establishment is responsible for ensuring that checks are carried out to ensure as far as reasonably practicable, that suitably trained, qualified and competent people deliver the activities that they have been contracted to provide. These checks also need to ensure

that the external provider holds sufficient Public Liability Insurance (PLI) in line with the Employer requirements.

It is the responsibility of third-party providers to carry out suitable and sufficient risk assessments for all Educational Visits and Offsite Activities that they provide for the school. This can be checked by using a provider with a LOTC Quality Badge and AALA (Adventure Activity Licensing Authority) accreditation (if applicable). If no LOTC Quality Badge is held then a Provider Form will need to be submitted for approval.

- Covered by suitable and sufficient risk assessments and these are brought to the attention of all staff, including volunteers involved/supporting the activity. These should be checked in relation to risk management systems. Risk management systems are required to be in place using a risk benefit assessment tool to ensure that adequate risk management measures are implemented. For activities provided and delivered by third parties reasonable checks of the provider using the risk management system should be used. The Head Teacher/Head of Establishment is not responsible for Providers' risk assessments and should not undertake any further risk assessments of a Providers' activities.
- Monitor visits, any significant findings reported to the Edsential's Educational Visits Advisor and to the school's Governing body so they can maintain effective oversight of these activities.

The DfE states schools should appoint an Educational Visits Co-Ordinator and ensure they have the training they need. Where such appointments are made the Headteacher/Head of Establishment remains responsible for the standard level of compliance that is to be achieved. Schools must monitor the performance of these appointed person(s) to ensure that the required tasks are being carried out competently in accordance with legislation, Employers Policy and Guidance, National Standards, and Industry Best Practice.

The appointment of an EVC should have sufficient authority (i.e., they should normally be a senior member of staff) to enable them to undertake their role and influence working practices. The Headteacher and Head of Establishment should ensure that the EVC is provided with the necessary information, instruction, training, and supervision to enable them to discharge their duties effectively.

6.5. Educational Visits Co-coordinators (EVC)

EVCs have a responsibility to ensure that they bring any significant failings relating to compliance with this policy and its associated procedures to the attention of their Headteacher/Head of Establishment. Further information and guidance should be read in conjunction with the following <https://oeapng.info/evc/>

The duties of the EVC are outlined below:

- Ensuring that you understand how Learning Outside the Classroom (LOtC), offsite activities and visits can support a wide range of outcomes for children and young people and raise achievement.
- Ensuring that you have attended EVC Training as recommended by DfE.
- Ensuring that LOtC, offsite activities and visits meet guidance requirements.
- Ensuring that establishment managers, visit leaders, assisting staff and voluntary helpers understand that all staff involved in LOtC, offsite activities and visits require access to training at an

appropriate level to ensure that the employer's guidance and establishment procedures are properly understood.

- Ensuring that you have an establishment visit policy. As a minimum, the policy will need to make a link between the establishment's procedures and Edsential guidance.
- Supporting the head/manager with approval and other decisions.
- Ensure visits are submitted to the Head within an appropriate timeframe so that forms can be submitted to Edsential as required.
- Monitoring Visit Leader planning and sample monitor visits.
- Organising the training of Visit and Assistant Leaders (including volunteers).
- Ensuring that where the accompanying staff includes someone with a close relationship to a group member, there are adequate safeguards to ensure that this will not compromise group management.
- Ensuring that DBS checks are in place as required.
- Reasonable comprehensive checks of any external organisations that are contracted to provide any activities regardless of whether these activities are being undertaken on or off-site are carried out to ensure that the external organisations are suitably trained, qualified and competent to provide such activities. These checks also need to ensure that the external provider carries the required insurance, recommended by the Local Authority or Governing body.
- Ensuring that establishment policy provides sufficient guidance to Visit Leaders about information for parents and parental consent.
- Checking that there are two 24/7 emergency contacts with the base for each visit and that emergency arrangements are in place.

All establishments Educational Visits Policies must ensure:

- **Medical and first aid needs, inclusion, charging, ratios, group, environment and activity are addressed.**
- Emergency arrangements include emergency contact access to all relevant records, including medical and next-of-kin information for all members of the party including staff.
- Individual activities and visits are reviewed and evaluated, and this process includes reporting of accidents and incidents, complying with employer requirements and Reporting Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 2013.
- Policies and procedures are reviewed on a regular basis.
- A review should follow any serious incident or system failure. Risk management documentation must be updated if necessary.
- There is an establishment procedure for recording 'near accidents/near misses,' including any resulting learning points and action.
- You keep up to date via EVC update processes and EVC Revalidation courses as recommended or required.
- Assistant Leaders are competent to carry out the tasks they are assigned.

- Activities and visits are led by competent and confident leaders. The Visit Leader needs to be both accountable and competent to carry out specified roles and responsibilities. Being competent requires that the leader can demonstrate the ability to operate to current standards of recognised good practice, as set out in National Guidance.
- Ensure that a Critical Incident and Emergency Plan is in place and relevant contact details are current.

The duties of the Visit Leader: the following should be read <https://oeapng.info/visit-leader/>

The duties of the Assistant Leader: the following should be read <https://oeapng.info/assistant-leader/>

The duties of the parent/adult volunteer: the following should be read <https://oeapng.info/parents/>

6.6. Staff

Staff are responsible for taking care of themselves and for others affected by their actions or their omissions. In the context of this policy this significance is outlined below:

- Co-operating with line managers and supervisors by implementing the agreed actions of any risk management process and planning when they undertake or are involved in activities falling within the scope of this policy.
- Reporting any failings in the risk management process relating to activities falling within the scope of this policy to the attention of management.
- It is an expectation of this Policy that all staff have been formally assessed as competent to undertake such responsibilities as have been assigned to them.

6.7. Staff training and competency

National guidance provides clear advice regarding the assessment of leader competencies. It is Edsential policy that all EVCs, Visit Leaders and Assistant Leaders have been assessed as competent to undertake their role.

Staff competencies and certificates must be uploaded onto EVOLVE.

Role	Mandatory Training	Recommended Training
EVC	Attend full initial training Attend update training every 3 years	
Visit leaders		Visit Leader training
Activity leader	Hold relevant NGB award Hold current relevant First aid certificate Or have been signed off as competent to lead for <u>specific activity</u> by the employer please see guidance doc section 28 – approval of staff to lead activity.	
Any visit	Suitably trained, confident and competent person to carry out first aid within the environment of that activity. Where the group is EYFS a Paediatric first aid certificate must be held	Certified first aid qualification
Ski Course Leader	Hold current Snow Course Leader	Alpine ski course leader award.

7. Emergency Planning, Critical Incident Support, and Incident Reporting

A critical incident may include an incident where any member of a group or individual undertaking an activity has:

- i. Suffered a life-threatening injury or fatality
- ii. Is at serious risk or
- iii. Has gone missing for a significant and unacceptable period.

Establishments should follow their own Critical Incident Emergency plan and should always have this documentation during all Educational Visits and Offsite Activities. All establishments must be aware of their Emergency Plan and Policy Guidance.

Home based contacts and Visit Leaders must know the School's Critical Incident Emergency Plan.

Incidents and Near Misses

All health and safety related incidents, including any 'near misses,' arising from activities covered by this policy must be reported following your Employers procedures

8. Monitoring and Review

The effectiveness of this policy will be monitored and reviewed in accordance with your Employer's Educational Visits Policy.

9. Key Policies and Links to Other Policies

Edsential discourages schools from signing waivers or disclaimers. See link [Waivers - OEAPNG](#)

Approval of staff to lead an adventurous activity

Procedure for obtaining approval

Staff who wish to **lead** (i.e., supervise or instruct) an adventurous activity, as defined in Section 21 of the Guidance Document must first upload details and scanned copies of all relevant qualifications and declaration of competency from employer (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.), along with leader information outlining qualifications and historic and current experience OR verification from a relevant technical advisor. The ALF will then be embedded within the Visit Form for that visit.

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

Where approval is not granted to lead the activity, the Visit Form may be returned to the EVC via EVOLVE, with an attached note. In this scenario the activity should not take place until the meets the criteria noted.

First Aid

For all visits there must be a confident and competent person to carry out first aid within the environment of that activity. This would usually mean a certified first aid qualification.

If the group is EYFS then a member of staff must hold a Paediatric first aid certificate.

Water Margins

Hotel, overseas swimming pools and open water swimming

Establishments must liaise with the EVC before any visit is planned for hotel (and other) swimming pools. If entering water **Establishments must check the lifeguard provision in advance**. See section 20 for guidance on lifeguard qualifications. It is strongly advised that all swimming, both structured and unstructured, is placed onto EVOLVE, however **curriculum swimming does not require Edsential approval**. School staff must be aware of a child's swimming ability before they commence activity.

Water Margin Activities

All staff involved in water margin activities should be conversant with the guidance contained in Section 16 'Group Safety at Water Margins'. This document must be made available to all supervising adults in advance of the visit.

Walking in open country

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

- a) For Establishment leaders of walking groups outside the UK or Ireland please contact Edsential for further guidance.**
- b) For leaders of walking groups in mountainous terrain within the UK and Ireland (600m or above):**
 - Mountain Leader Award (Summer or Winter as appropriate) www.mltuk.org **or**
 - A written statement of competence by an appropriate technical adviser - see [Section 28](#)
- c) For leaders of walking groups in summer conditions in non-mountainous hilly terrain**

(Known variously as upland, moor, bog, hill, fell or down, with well-defined obvious boundaries such as roads and coastlines. Where any hazards within it are identifiable and avoidable and where wild camping or movement on steep ground is not involved.)

 - MLT Hill and Moorland Leader along with the Expedition module if camping is involved, as well as relevant first aid qualification. <http://www.mountain-training.org>
 - A written statement of competence by an appropriate technical adviser - see [Section 28](#)
- d) For leaders of walking groups in terrain easier than that defined in c) or which is 1000m from transport access or 300m above sea level.**

The leader must demonstrate an appropriate level of competence. This may include one or more of the following:

- Lowland Leader award. See <http://www.mountain-training.org/>
- Hill and Moorland Leader
- Mountain Leaders Award Winter/Summer
- Evidence of recent and relevant experience which has been appropriately corroborated.
- An assessment of competence by the Head of Establishment or nominated competent individual.

Snowsports

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 snowsports school instructor) must be qualified as below - see [Section 28 and section 2](#)

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

- The Alpine Ski Course Leader Award (ASCL) www.snowsportengland.org.uk **or**
- The Alpine Ski Leader Award (ASL) www.snowsportscotland.org **or**
- BASI Level 2 Ski Instructor www.basi.org.uk
- 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.snowsportscotland.org **or**
- BASI Level 2 Snowboard Instructor www.basi.org.uk
- A statement of competence by an appropriate 'technical adviser' - see [Section 28](#)

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

- The pupils are under the direction of a suitably qualified local instructor
- They remain within the designated controlled areas
- There is insurance in place that covers them to do so

Private Cars

Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Head of Establishment. Heads of establishment should see the Transport section in guidance section 14

OEAP guidance on Transport [OEAP - Transport](#)