

# Outdoor Learning and Off-Site Visits Policy



## King Henry VIII 3-19 School Ysgol 3-19 Brenin Harri'r VIII

We believe in the limitless capacity for everyone to achieve great things.

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**Outdoor Learning  
and Off-Site Visits  
Policy 2026**

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## **Introduction**

This document sets out Monmouthshire County Council's planning and approval procedures for outdoor learning, off-site visits and learning outside the classroom (referred to as 'visits' or 'activities'), and the procedures by which the Local Authority (LA) and its educational establishments meet the standards set out by the Outdoor Education Advisers' Panel (OEAP) National Guidance (NG). National Guidance is supported by the Welsh Government (WG). This document replaces all previous Monmouthshire policies and guidance relating to outdoor learning, off-site visits and learning outside the classroom.

Employers and employees who organise visits and activities, have a duty under the Health and Safety at Work Etc. Act 1974 and other health and safety legislation, such as the Management of Health & Safety at Work Regulations, 1999 and the Health and Safety (First Aid) Regulations, 1981 to ensure reasonable risk management procedures are in place for the planning and organisation of these activities.

Anyone organising an outdoor learning, off-site visit or learning outside the classroom opportunity for children and young people from a LA controlled educational establishment (e.g schools, youth service) in Monmouthshire must follow the procedures set out in this policy, plan their visit using the online '[EVOLVE](#)' system and use the online '[OEAP National Guidance](#)' to help manage the visit. Non-Monmouthshire controlled establishments may also use this policy and procedures but must first contact the Outdoor Education Adviser (OEA) and formally adopt the policy through the governing body or management board of the establishment.

Staff must also be aware that this policy should be read in conjunction with other establishment / LA policies, guidelines or advice that may be relevant to the overall planning of a visit, e.g. health and safety, safeguarding, inclusion, critical incident plan, accident reporting, first aid, charging policy, transport, volunteering.

The LA strongly advises that this policy be adopted by the schools' governing body, or in the case of other establishments, the management board. It is the responsibility of the establishment to ensure that all staff involved in visits, whether managing or leading them read and understand the policy and any revisions or updates are communicated effectively. The establishment's Educational Visits Co-ordinator (EVC) should upload the policy onto EVOLVE and ensure that all staff have access to it.

This policy is reviewed (and updated as necessary) every three years or following an accident or incident on a visit.

**Foreword by the Strategic Director, Children, Learning, Skills and Economy**

Well planned and well organised outdoor learning, off-site visits and learning outside the classroom opportunities offer invaluable experiences to enhance the curriculum, enrich children and young peoples' learning, experience something new, raise self-esteem and increase motivation. In turn, this leads to an appetite for learning, helps foster good staff/young people working relationships and helps raise levels of achievement in education and life.

Delivering learning outside or off-site does not need to be more difficult than delivering it inside a classroom. Planning and management should, therefore, be practical, proportionate and non-bureaucratic.

The key to effective and successful outdoor learning and off-site visits is the right leaders doing the right activities with the right young people in the right places at the right time.

Learning outside the classroom is a strong theme that runs through all stages of education in Wales and Monmouthshire County Council is committed to offering an exciting and enjoyable range of outdoor learning experiences for our young people.

It is important that children and young people are progressively exposed to carefully managed risks, without being exposed to significant dangers. Off-site educational visits can range in scope from a short excursion to a local park, museum, cultural or historical venue to a wide variety of outdoor and adventurous activities or an overseas expedition.

This document sets out the planning and approval procedures which help staff to plan and deliver high quality and safe visits. By adopting these nationally recognised procedures, staff will be following best practice, therefore reducing the level of risk to our children and young people and in doing so will be supported by the Local Authority should an incident occur.

Staff who organise and engage in outdoor learning, off-site visits and learning outside the classroom with children and young people show dedication, commitment and enthusiasm. Their work ensures that the young people of Monmouthshire continue to be given the opportunity to take part in such activities. I would like to take this opportunity to thank all of them for their professionalism, commitment and dedication. This document is aimed at supporting them in their valuable work and helping to make the organising of visits as straightforward as possible.

Will McLean



## **SECTION A**

### **Roles and responsibilities**

#### **Visit Leader (VL)**

The Visit Leader has overall responsibility for a visit. This includes the learning, development and supervision of the participants and the safety of all, including any other leaders and helpers. To ensure accountability and to avoid potential confusion, a single Visit Leader should be designated. If this role changes during a visit, a clear handover should be made.

The key requirements for Visit Leaders are that they must be competent to lead, confident and accountable. Visit Leaders should have the ability to lead to the level demanded by the visit, and have sufficient relevant experience and knowledge of the activities, the group, and the environments they will operate in. Training for visit leaders is provided by MonLife's Outdoor Advisory Service and is highly recommended for those new to the role, ensuring that they have sufficient skills to be able to lead safe and high quality visits. (see page 6).

Visit Leaders must follow this policy and related guidance and undertake and complete the planning and preparation of the visit, including risk management. They should brief group members (young people and staff) and parents/carers and ensure that the roles and responsibilities of other staff (and young people) are properly defined and communicated, ensuring effective supervision.

#### **Educational Visits Co-ordinator (EVC)**

Each establishment must have a competent Educational Visits Co-ordinator who has completed the EVC training course within 6 months of taking on the role and updated every 3 years. The EVC is the establishment's focal point for planning and monitoring visits and is the routine contact for dialogue with the Outdoor Education Adviser (OEA). Due to the nature of the role, the EVC should be an experienced Visit Leader with sufficient status within the establishment to guide the working practice of colleagues leading visits or outdoor learning opportunities.

They should be part of, or able to influence the senior management team and have sufficient authority to make a judgement call about the competence of any other staff member to lead or assist with a visit and to approve or decline visits. This cannot be a purely administrative role, although certain functions may be delegated to an administrator.

The EVC should ensure that all visits meet the employers and establishment's policies, procedures and requirements. This includes appropriate monitoring, evaluation and recording to ensure that the Head/Manager and Governing Body/Management Board can access the data they require.

#### **Head/Manager**

Heads/Managers must ensure that the establishment has adopted this policy and that all relevant staff are notified of any updates to the policy or guidance involving outdoor learning, off-site visits or learning outside the classroom.

Headteachers/Managers are responsible for ensuring that establishment staff are competent for the roles allocated to them, and that there is a robust system in place for approving leaders and approving plans for activities and visits.

An appropriately competent EVC must be appointed and be allowed sufficient time to fulfil the role, including attendance at OEAP-approved training. Heads/Managers often choose to designate themselves as EVC. Any change of EVC or Head/Manager must be notified to the OEA as soon as possible. Where an EVC has not been nominated, the Head/Manager will assume responsibility for this role.

The Head/Manager should ensure that arrangements are in place for the educational objectives of all visits to be inclusive and keep the Governing Body/Management Board informed about the delivery of visits. They must ensure that effective support structures are in place for dealing with emergency situations. Further details on responding to an emergency incident can be found in Section C (and Appendices a-d).

The Head/Manager must approve **all** visits prior to the visit taking place and forward to the LA (on EVOLVE) any visits requiring LA approval.

### **Governing Body/Management Board**

Members of a Governing Body or Management Board should view their main role as being 'to enable and ensure'; otherwise described as being a 'critical friend'.

A Governing Body/Management Board should ensure that it has a clear understanding of employer's responsibilities under health and safety law. They must ensure that this policy has been formally adopted by the Governing Body/Management Board and that robust systems support implementation of the guidance and ongoing advice and training.

The governing body should challenge to be clear about of how visits lead to a wide range of outcomes for children and young people and contribute towards establishment effectiveness.

The involvement of the Governing Body/Management Board in the visit approval process should be clear, ensuring that approval and notification procedures operate effectively. It may be appropriate for one or more members of the governing body to have access to visit details on EVOLVE, to be determined by the establishment.

Monitoring procedures should be in place, visits evaluated, good practice shared and any issues should be followed up to comply with statutory and employer's requirements.

### **Outdoor Education Adviser (OEA)**

The Outdoor Education Adviser fulfils the statutory council functions to support the LA in meeting its legal responsibilities and powers regarding visits delivered to young people by its employees.

With the support of MonLife Outdoor Adventure, the OEA provides expert advice on safety and quality of off-site visits and outdoor learning, including risk management. The OEA is a member of the Outdoor Education Adviser's Panel (OEAP), ensuring that National Guidance, advice and initiatives are presented at a local level.

The OEA ensures that adequate and appropriate training is available and taken up by relevant employees. On behalf of the LA, the OEA approves (or disallows) visits for which LA approval is required. The OEA monitors standards of health and safety on visits, including observation.

Please [click here](#) for further details of the roles above detailed in NG.

## Training

Training is available through MonLife's Outdoor Adventure Service:

<https://www.monlife.co.uk/outdoor/outdoor-adventure/outdoor-education-advisory-service/> to enable staff wishing to fulfil any of the roles below to gain background knowledge and key skills to carry out the role. Following training, staff should be given time to consolidate their skills and knowledge by shadowing experienced staff, becoming an assistant leader and then taking on a leadership role with the support of experienced staff until the Head/EVC is confident of the leader's abilities to carry out the role.

Staff should also have completed safeguarding training to the required level for their role:

<https://socialcare.wales/news-stories/national-safeguarding-learning-development-and-training-framework-now-available>

Course Title	Relevance	Details
Educational Visits Co-ordinator (EVC) Training (OEAP certified)	<b>Mandatory</b> for this role (to be completed within 6 months of taking on the role)	One day course for new EVCs who have been approved by the Head/Manager to be the EVC for the establishment.
EVC update training (OEAP certified)	<b>Mandatory</b> for this role	Half day course for those who have completed the one-day course and need an update. This course should be attended every 3 years
Visit Leader (VL) Training (OEAP certified)	<b>Recommended</b> for this role, particularly new VLs	One day practical course, for those wishing to lead off-site visits in a variety of settings.
Head/Manager role	For further understanding of this role in relation to visits	Delivered via cluster group meetings / Teams.
Governor/Management Board role	For further understanding of this role in relation to visits	Delivered to whole governing bodies or group of specific governor roles e.g. H&S lead / chair.
EVOLVE training	For staff managing and planning visits online	Delivered via Teams / groups of visit leaders / EVCs
Snowsport Course Organiser (SCO) Course	<b>Mandatory</b> for those wishing to plan, organise and take groups skiing or snowboarding	One-day classroom-based course delivered by Snowsport Cymru ( <i>Refresher training recommended every 3 years</i> )  ( <b>Please note</b> - this course is <b>not</b> for leading the practical elements of skiing or snowboarding)
Outdoor Learning (OL) Cards Course (OEAP certified)	For staff wishing to broaden their PE/Forest schools/outdoor learning interest, knowledge and skills	One day practical course to help develop Outdoor Learning as part of the Curriculum for Wales in primary or secondary settings. Includes orienteering, problem solving, bouldering and journeying.
RLSS National Water Safety Management Programme (NWSMP)	For VLs working with groups in water or at water margins	A modular programme offering practical elements of preventative management of groups in or around a variety of water-based environments e.g. river, beach, canal, lake. Also

		includes rescue and recovery modules if required.
National Governing Body (NGB) Awards e.g. Lowland Leader, Paddlesport Instructor	For those wishing to lead an adventurous activity e.g. walking, canoeing	For details of individual training courses, please contact MonLife Outdoor Adventure: <a href="https://www.monlife.co.uk/outdoor/outdoor-adventure/">https://www.monlife.co.uk/outdoor/outdoor-adventure/</a>

**Contact details:**

All contact numbers given in this policy are correct at the time of going to print. However, contact numbers can change and it is important that any numbers relied upon by the visit leader e.g. emergency (base) contact or other staff members are checked for accuracy before travel.

For general advice about outdoor learning, off-site visits, learning outside the classroom and adventurous activities, Local Authority (LA) approval for off-site visits, LA leader approval and training:

**Clare Adams**

Outdoor Education Adviser

Gilwern Outdoor Adventure Centre, Ty Mawr Lane, Gilwern, NP7 0EB

**E-mail:** [clareadams@monmouthshire.gov.uk](mailto:clareadams@monmouthshire.gov.uk)

**T:** 01291 440950

**M:** 07966 158868

For enquiries about Gilwern Outdoor Adventure Centre, outdoor learning, adventurous activities, NGB training and in the absence of the OEA:

**Tom Burrett**

Centre Manager

Gilwern Outdoor Adventure Centre, Ty Mawr Lane, Gilwern, NP7 0EB

**E-mail:** [tomburrett@monmouthshire.gov.uk](mailto:tomburrett@monmouthshire.gov.uk)

**T:** 01873 735485

**T:** 01291 440951

**M:** 07970 980829

## SECTION B

### Off-site visit approval

All visits must be approved as set out in the table below, using EVOLVE.

Type of Visit	Who approves the visit?	Submission timescales
<b>Routine</b> ( <i>see definition below</i> ) and all other visits not listed in this table	<b>Head/Manager</b>	<i>(Establishment decision, but 15 days is recommended)</i>
<b>Residential</b> ( <i>overnight</i> ) and visits or activities including <b>adventurous activities</b> ( <i>see definitions below</i> )	<b>Head/Manager</b> followed by <b>LA</b>	<b>28 days</b> in advance
<b>Duke of Edinburgh's Award</b> training or expeditions	<b>Head/Manager</b> followed by <b>LA</b>	<b>28 days</b> in advance
<b>Overseas</b> visits or expeditions using a <b>provider</b> (e.g. tour operator / travel company)	Initial approval by <b>LA</b> ( <i>using form OA1 in the resources section of EVOLVE</i> )	<b>12 months</b> in advance
	Followed by final approval by <b>Head/Manager</b> then <b>LA</b>	<b>28 days</b> in advance
<b>Overseas</b> visits not involving a provider	<b>Head/Manager</b> followed by <b>LA</b>	<b>28 days</b> in advance
<p><b><u>IMPORTANT</u></b>  <b>VISITS MUST NOT PROCEED UNTIL THE CORRECT LEVEL OF APPROVAL HAS BEEN OBTAINED</b>  <i>(It is the Visit Leader's responsibility to check this before proceeding)</i></p>		

### **Blanket approval**

Approval for a series of visits may be given by Heads/Managers for staff to run routine visits or by the LA for those staff who have gained LA leader approval. For visits that have been given blanket approval, the Visit Leader and EVC must ensure that the establishment emergency (base) contact has access to full visit details including details of the venue, activity, group, transport, start/finish times and other relevant information for **each visit**.

## Visit definitions:

### **Routine visits**

These are regular, repeated visits that are usually part of the curriculum and take place either on the establishment site or in the local area. They take place within normal establishment operating hours, usually require no extra payment to be made and risks involved are covered by a generic risk assessment. Examples of such activities are swimming lessons, local area visits to a park or museum, sports fixtures.

### **Adventurous activities**

The table below lists a range of adventurous activities, although it should be noted that this is not an exhaustive list. If any uncertainty arises as to whether an activity is adventurous or not, VLS should seek the advice of their EVC, or contact the OEA.

<b>Land Based Activities</b>	<b>Water Based Activities</b>
Rock climbing, abseiling, scrambling, via ferrata, including climbing walls	All watercrafts including boats, boards, rafts, inflatables, skis etc (except commercial transport)
Mountaineering	All activities in rivers, gorges, ghylls, canyons
Walking on hills, mountains, fells, moors or near cliff tops	Aqua or water parks
Walking in lowland country more than a 30 minute walk from a public access point e.g car park, lay-by, built-up area	Snorkel and aqualung activities including diving
Ice climbing	Coastal scrambling, sea cliff traversing, coasteering, plunge pooling
Underground exploration – cave or mine (except tourist caves)	Any pool or open water swimming, diving or bathing (except in a public lifeguarded pool)
Skiing or snowboarding (snow or dry slope)	
Tobogganing, sledging, ringos , tubing	<b>Other Activities</b>
Air activities (excluding commercial flights)	Any activity more than 3km or 30minutes travel from a public access point e.g car park, lay-by, built-up area
Horse riding and pony trekking	Ice skating (except on supervised managed rinks)
High Level ropes courses	Skateboarding
Motor Sport (all forms including quad biking or ATVs)	Trampoline Parks
Orienteering (except in establishment grounds and public parks)	
Mountain biking	
Paintballing, shooting or archery	

## SECTION C

### Standard Operating Procedures

#### 1) Planning your visit – STAGER

Identify clear aims and benefits: Answer the WHAT, WHO, WHY, WHERE and WHEN questions. In other words, be clear about what you want to achieve, with whom and why. A clear understanding of aims makes it easy to identify suitable choices for many other aspects of planning (such as venue, transport, competence of leaders, preparation of the group etc). Identifying the potential benefits is essential in making sound judgements as to whether the plan is sensible, acceptable, and viable.

The degree of complexity of visit planning and management will depend on the interplay of several variables. These variables can be remembered as 'STAGER' and the following needs to be considered:

**S taffing** – experience / training, competency, vetting, staff/participant ratio, knowledge of each other  
**T iming** – time of year, daylight hours, weather / travel conditions, curriculum constraints, religious days, term time/ holiday, weekend/weekday, cost variation, staffing issues, availability of emergency response  
**A ctivities** – suitability, complexity, adventurous activities, residential, transport, staff / participant training, equipment, external provider  
**G roup** – age, gender, behaviour, individual needs / abilities, experience / training, known to staff, consent  
**E nvironment** – weather, ground conditions, water levels, tides, accommodation, other hazards, disabled access  
**R emoteness** – travel distance / time / cost, routine / emergency communications, emergency access, overseas complexities, language

For further NG details, please [click here](#).

#### 2) Parent/carer consent and communication

Informed parent/carer consent must be obtained for **all non-routine visits**, as well as obtaining up to date emergency contact, medical, dietary and swimming ability (if applicable) information. For routine visits, blanket parental consent can be obtained on an annual (or termly) basis.

The key is to provide parents/carers with sufficient information to make an informed decision about the participation of their child. Such information may be given in a variety of ways, as the information needed by parents/carers will depend on the nature and complexity of the visit. For example, regular sports fixtures or cultural visits may involve information being given for the term ahead with parents being informed of any changes to this as they occur, perhaps by phone, email, text etc. For more complex visits, specific information letters will be needed and for the most complex or adventurous visits, a combination of written information and briefing/information meetings may be most appropriate.

Parental consent can be obtained directly through the EVOLVE system, or alternatively examples of routine and non-routine consent forms can be found in the 'resources' section of EVOLVE.

If parents/carers withhold their consent, the child must not be taken on the visit, but the curricular aims of the visit should be delivered in an alternative way wherever possible. If the parent/carer gives a conditional consent, the Head/Manager will need to consider whether the young person may be taken on the visit or not.

There is no requirement for visit leaders to carry evidence of consent on visits in the UK, but this may be necessary in some countries overseas, and when crossing borders including when leaving the UK. Seek advice before travelling from your tour operator or appropriate consulate.

A 'code of conduct' or 'behaviour contract' may be beneficial in some circumstances, which should be discussed with parents and children and signed by them. It may even be appropriate for the children/young people to write the contract themselves. It is important to set out expectations early on and getting parents and children involved makes the process more transparent, easier to manage and gives it credibility. Relevant information should include any sanctions for inappropriate behaviour and in exceptional circumstances parents/carers agreeing to the child being removed from the visit. Other details may include the use of mobile phones, valuables etc.

For further NG details, please [click here](#).

### 3) Inclusion

'The Equality Act 2010 defines several protected characteristics: disability; gender reassignment; pregnancy and being on maternity leave; race; religion or belief; sex; sexual orientation. It is illegal to discriminate against someone because of these characteristics, and an employer or establishment must make reasonable adjustments to its facilities or services to include them'.

Outdoor Learning, Off-Site Visits and Learning Outside the Classroom activities should be available and accessible to all. When planning a visit, outdoor lesson, or activity, it should be recognised that there is an entitlement to participate and that reasonably practical measures must be taken to include every group member to allow them to participate fully and gain the benefits. This may involve using a different venue, transport or using additional supportive aids or services.

Occasionally, it may be impossible to make reasonable adjustments and therefore a decision needs to be made, so that the rest of the class or group do not miss out. Any exclusion decision should not be taken lightly and should involve consultation with those who have responsibility for them, e.g. class teacher, ALNCo, parents/carers, social worker. Alternative ideas should be discussed so that the child does not miss out completely on the learning opportunity and decisions should be documented.

For further advice on inclusion, including behaviour management, please [click here](#) for NG.

### 4) Risk Management

Employers are required by law to carry out an assessment of the risks and to record any significant findings, including for outdoor learning, off-site visits and learning outside the classroom. These must be carried out by a competent person (usually the visit leader) and the written assessment must be dated. It is advisable to keep risk assessments up to date and reviewed at least once a year, or more frequently when there are significant changes, or because of an accident or near miss.

Most human activity involves balancing benefits and risks. We cannot have all the benefits but none of the risks. We can eliminate all the risks only by stopping the activity, but we then lose all the benefits. Good visit management is about maximising benefits while reducing risks to acceptable levels.

**Risk management, in the context of outdoor learning and off-site visits, is a two-stage process:**

1. The identification of the potential benefits to be gained from an activity, along with any risks to the health and safety of those involved.
2. The implementation of a plan to best realise these benefits, using professional judgement to ensure that the level of risk does not exceed that which can be justified by the benefits.

**There are two broad categories of visit requiring different levels of planning, which are:**

1. **Routine visits** that involve no more than an everyday level of risk. Such visits should require minimal planning or preparation beyond what is needed to make best use of the learning opportunity. In a school context, they are simply lessons in a 'different' classroom. These visits may be covered by a generic risk assessment document and used by all staff for all routine visits.
2. **Visits requiring additional planning, and some level of specific risk assessment.**  
This may be due to distance 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. For some visits this will involve detailed planning over an extended period.

Learners with an existing individual risk assessment in place will need to be updated by the establishment to reflect risks relevant to the visit. Consideration should be given as to who needs to be aware of the individual risk assessment.

Where a provider is used to facilitate activities, it is good practice to liaise with the provider on who is managing which aspects of the visit and therefore who is best placed to write a document to support these aspects. Often, the reason for engaging a provider is so that they can provide technical aspects of the visit, for example climbing, canoeing, field work or skiing. As a result, you are **not** expected to incorporate their risk assessment documents into your planning details. You may however include supportive aspects, such as 'ensuring that children and staff listen to the instructor' or 'ensuring that everyone is dressed appropriately for the activity' into your own plans.

Examples of risk management forms can be found in the 'resources' section of EVOLVE, under 'risk management'.

Further information and guidance on risk management and writing a risk assessment document can be found by [clicking here](#) for NG and [here](#) for HSE guidance.

### **5) Using a Venue and/or External Provider**

A venue is a facility or place you may choose to visit to enhance your curricular aims. Some examples of venues are visitor attractions and public access venues such as zoos, country parks, historical/cultural sites, sports stadia, theatres, bowling alleys, theme parks, public access (lifeguarded) swimming pools or similar.

Check that the venue meets your aims, expectations, needs, safety aspects and value for money by comparing with other similar venues. There is no substitute for first-hand, up to date information and therefore it is strongly advised that, where possible a **pre-visit** is undertaken to any venue or area being used for a visit, particularly if the venue is new to the establishment.

An external provider or 'provider' is any organisation or person external to your establishment contracted to organise and/or lead all or part of a visit or activity, e.g. an activity centre or instructor, tour operator, field studies centre, ski school. Providers may be located at the venue you have chosen or may be separate or independent.

If the provider holds the LOtC (Learning Outside the Classroom) Quality Badge, VLS **do not** necessarily need to carry out further safety and quality checks, as the LOtC Quality Badge is the only nationally recognised indicator of good quality educational provision AND effective risk management.

[Click here](#) to search for a LOtC quality badge holder.



Providers who are **not** LOtC holders will need to complete the **Provider statement** (in the 'resources' section of EVOLVE, under the 'provider' tab) and VLS will need to check that this has been satisfactorily completed **before booking**. This requires them to confirm that they have risk assessments in place for all activities/services that they provide and that these are available to view at the premises on request.

### **Overseas providers**

If using a provider for an overseas visit, you must first seek **Initial LA approval 12 months** in advance of the proposed visit, by completing Form OA1 (in the 'resources' section of EVOLVE, under 'overseas visits'). A booking should only be placed once confirmation of initial approval has been received.

Seek specialist advice on any concerns arising from the provider's responses by contacting the OEA and [click here](#) for further details on external providers in NG.

## **6) Local Authority (LA) leader approval**

### **Who needs LA leader approval?**

Staff or volunteers who wish to lead adventurous activities (see adventurous activities table, page 9) must first be confirmed as technically competent to lead by the OEA, or appropriate technical adviser.

Prospective leaders must seek LA leader approval through their own EVOLVE log-in via the '**My details/awards**' section.

To be granted approval, the applicant must have all the following:

**Either** a) the relevant National Governing Body (NGB) leadership award for the terrain/activity  
**or** b) have a written and signed statement of competence by an appropriate technical adviser verifying that the leader has the relevant technical and group management skills for the terrain/activity;

- Recent and relevant experience
- A current first aid certificate or qualification
- Support of the Head/Manager

Technical adviser approval is usually only given if the leader has completed a training course in the relevant NGB leadership award, where one exists, and the technical adviser has made a practical assessment and can confirm that the leader is operating at the standard of the relevant NGB leadership award or at a suitable level for a site-specific approval to be given.

Depending on level of experience and technical skill, leaders may be given approval to lead either the activity/activities at specific, named venue(s) or at all venues that are within the remit of their competence at any time for the duration of the approval period.

The OEA will notify the leader and their EVC of their LA leader approval decision and this will be recorded in the leader's '**My details**' section of the EVOLVE system. This can be viewed at any time by the leader, their EVC or Head.

[Click here](#) for additional details in NG.

### 7) Volunteers or helpers

A volunteer may take any role in a visit, including VL, assistant leader, activity leader or helper. This could involve help with transport, supervising a small group of children on a day visit, leading a specialist activity or a teacher's partner accompanying a ski visit.

When using volunteers, it is essential that they meet the requirements for the role (including accountability) and have been approved by the Head/Manager. When recruiting volunteers, the establishment must adhere to current LA policy for volunteering and induction, including safeguarding training to the required level for their role: <https://socialcare.wales/news-stories/national-safeguarding-learning-development-and-training-framework-now-available>. They must be sufficiently competent and confident to carry out their responsibilities. Volunteers, particularly working independently, should be operating to the same standard as would be expected of an employee or contractor taking on the role and paid staff should make up at least 50% of the staffing team for a visit.

[Click here](#) for further details in NG.

### 8) Group management and supervision

The responsibility for supervision is continuous, 24 hours a day for the duration of the visit/activity. It is important that care and supervision are maintained during periods outside structured activities, as well as during the activities themselves. This does not mean that young people need necessarily to be constantly watched, but rather that leaders need to achieve a sensible balance of activities and supervision methods. Opportunities for such time should be built into the visit itinerary, be included in information to parents and be covered by the risk assessment. [Click here](#) for further guidance on group management and supervision in NG.

## Staff to young people ratios

A question that arises frequently is ‘What are my ratios?’ In most cases it is difficult to answer without knowing the **STAGER** dynamics (page 10). As a starting point only, previous OEAP WG endorsed guidance (2010) used the following as guidance, however, ratios should be determined by carrying out a risk assessment:

General off-site visits			
Activity	Age of young people	Staff: young person ratios- typical range NB. actual ratios must be determined by a process of risk assessment	Leader competence
Local and routine visits	Nursery	1: 2-4	Previous experience and approved by Head/EVC
	Reception/Year 0	1: 4-6	
	Years 1-3	1: 6-8	
	Years 4-6	1: 8-15	
	Year 7 onwards	1: 15-20	
Residential visits and visits abroad	Years 4-6	1:8-10	As above
	Year 7 onwards	1: 10-15 (but 1:10 with 2 staff minimum for visits abroad)	
Swimming in public pools (with lifeguard)	Years 1-3	1: 5-8	As above
	Years 4-6	1: 10-12	
	Year 7 onwards	1: 15-20	
Swimming elsewhere (without lifeguard)	All years	1: 5-10 (but 2 staff minimum)	As above & lifeguard qualification or rescue experience (LA approval needed)

Further NG documents on ratios and effective supervision can be found by [clicking here](#).

## 9) Duke of Edinburgh’s Award (DofE)

Anyone planning DofE training or ventures must contact the LA’s DofE Development Officer, to ensure that the training or venture meets the requirements of the DofE and the LA.

### Contact details:

Andrew Woolley, DofE Development Officer  
 Gilwern Outdoor Adventure Centre, Ty Mawr Lane, Gilwern, NP7 0EB  
**E-mail:** andrewwoolley@monmouthshire.gov.uk  
**M:** 07516 352446

The DofE Expedition Supervisor is responsible for ensuring that risks are managed appropriately during the expedition (and any training sessions carried out in preparation for the expedition). Supervisors from LA controlled establishments must adhere to this policy, plan and approve their DofE training or venture using EVOLVE and apply for LA leadership approval, as above via EVOLVE.

### **10) Joint or collaborative visits**

Any visit or activity involving children from your establishment, or where young people have been recruited through your establishment should be treated as one of your own visits **even if another establishment or external provider is taking the lead role in organising the visit**. Examples include:

- sports fixtures/tours where your establishment has made children/parents aware of the opportunity but where the visit is being staffed by other adults (e.g. sports coaches, LA staff, Urdd staff, PTA groups or similar).
- Two schools working together to plan and manage an off-site visit

For these visits, the EVC and Head **must be able to evidence that they have:**

- ensured that the LA's requirements for visit planning and approval have been met. Another establishment may carry out this planning and approval if they are taking the lead role but the visit plan must include all children and staff attending the visit from all establishments involved and the visit plan must be approved by the EVC/Head/Manager.
- satisfied themselves that the staff leading the visit are competent to do so e.g. confirmation by another establishment Head/Manager and that all activities are delivered by a suitably competent and insured activity provider or leader.
- ensured that the supervisory staff for the visit are made aware of and can manage any relevant additional needs appropriately.
- been sufficiently involved in planning for the visit to ensure that the activities, risk management and pastoral care arrangements (including 24 hr supervision) are appropriate.
- ensured that parents are made fully aware of the details of the visit including supervision levels and have given informed consent.
- ensured that they can be contacted in the event of an incident, accident or other emergency and that arrangements for emergencies are clear between the establishments involved.

### **11) Transport**

When selecting a method of transport, please [click here](#) for to the relevant section in National Guidance which gives general advice on driver competence, group supervision on transport, the hiring of coaches and minibuses as well as transport in private cars or establishment minibuses and seatbelts/child restraints.

Consideration should be given to the type of transport used according to the needs of the group and/or aims of the visit. If the group has specific needs or requirements for travel e.g wheelchair access, then these should be discussed with the transport provider in advance.

If hiring a coach or minibus with driver, the establishment must be able to confirm that the company is reputable and that it meets required standards, either by using the approved list of transport providers, provided by MCC Passenger Transport Unit (PTU) and listed on EVOLVE, or by using the checklist in NG

here. The company should be able to offer assurances to support the service that they offer and will be able to direct users to other, similar users who can confirm this.

If travelling abroad with a transport provider, they must either be assured via the tour operator, or the NG checklist should be used. It must be noted that when travelling abroad, some countries have varying operational procedures and it may be, for example, that coach seatbelts are not fitted as standard.

## 12) Insurance

Any Monmouthshire establishment, their staff, volunteers, children and young people operating under this policy who are authorised and have had their visit formally approved are insured by the LA's comprehensive employers and public liability insurance, personal accident and travel policies. This covers all visits including residential, visits abroad and adventurous activities.

If you are planning an unusual visit, involving an overseas expedition or activity not mentioned under 'adventurous activities', you should initially contact the OEA and then seek confirmation of insurance cover via Monmouthshire's insurance department.

If using an external provider or tour operator, participants will still be covered under the LA's policy, **so it will not be necessary to purchase separate insurance through the provider**. If insurance cover is provided free of charge as part of a package, and in the event of a claim being made, participants will be covered by both policies. Often, the LA's policy will be more comprehensive than the providers, so if faced with a claim situation, in whatever context, **always** call the insurance team first to seek advice. **DO NOT ATTEMPT TO DEAL WITH THE CLAIM YOURSELF.**

If an adult or child is too ill to travel because of Covid-19 or other illness, then a claim can be made to recover the costs. However, insurance is **not** provided by the LA for visit cancellation because of Covid-19, for example in the event of a national lockdown. Therefore, it is essential to receive written confirmation of cancellation guarantees from the provider (ideally as part of the contract), particularly when travelling abroad. Although not necessary, some establishments may wish to consider additional cancellation cover, which can be sought from some insurance companies at an additional cost.

Details of Monmouthshire's Insurance policies can be found in the 'resources' section of EVOLVE under 'Monmouthshire docs'.

Further advice in NG can be found by [clicking here](#).

## 13) Finance and contracts

Establishments should ensure that they comply with the Welsh Government guidance on 'charging for school activities', which includes school visits, along with arrangements for those who are unable to afford the cost of a visit <https://www.gov.wales/charging-school-activities-guidance-governing-bodies-and-head-teachers>.

You must ensure that you have authority from your Head/Manager or the LA (depending on the type of visit) before you enter into any contract with a tour operator or provider. All contractual agreements for visits organised by an establishment should be between the establishment organising the visit and the

provider. **You should not allow providers to agree contracts or waivers directly with participants or parents as you may not be insured.**

When considering whether to agree a contract, **you should make sure that you fully understand any relevant terms and conditions**, paying particular attention to cancellations terms, deposits and payments and acknowledgement of risk or waiver details. Further details on contracts and waivers can be found [here](#)

Establishments who require access to additional emergency funding for overseas and/or residential visits must contact creditors ([creditors@monmouthshire.gov.uk](mailto:creditors@monmouthshire.gov.uk)) to arrange a procurement card at least 28 days in advance. Any credit limit changes to existing cards will also need to be done 28 days in advance. The National Guidance document 'charging for school activities' can be accessed [here](#)

#### **14) First aid**

Establishments should have in place an assessment to determine their first aid provision on site. Off-site provision is simply an extension of this. The determination of the appropriate requirements should consider:

- The nature of the activity;
- The nature of the group;
- The likely injuries associated with the activity;
- The extent to which the group will be isolated from the support of the emergency services (both in terms of distance and response time).

Qualified first-aiders may not be necessary for all off-site activities and visits, however a basic level of first aid support should always be available. This will require that one or more of the staff leading the activity has a working knowledge of simple first aid and is competent to use the first aid materials carried with the group and knows how and where to access qualified first aid support.

For further details of first aid provision, [click here](#) for NG.

#### **15) Final preparations**

There are Visit Leader check lists [here](#) in NG, which may be used to ensure you have covered all the organisational needs for the visit. You will also need to consider communication with other members of staff who are attending the visit and what information you should have to hand during the visit.

##### **Communication with other staff on the visit:**

Depending on the nature of the visit, you may simply relay important information and organisational details to staff an hour prior to the visit, ensuring that they have read and understood the risk assessment. However, for a more complex visit, it may take the form of a formal meeting several weeks before the visit to discuss a plan for supervision levels for different activities including 'down time', defining roles, handovers where appropriate and the sharing of information, for example medical and additional needs details. You may ask staff to read and sign the itinerary / management plan, including the risk assessment document.

### **Communicating with the emergency (base) contact:**

An appropriate emergency (base) contact must be identified who will usually be a senior member of staff who is not staffing the visit and is contactable 24hrs for the duration of the visit. The emergency (base) contact must have the authority to make decisions in emergency situations on behalf of the establishment.

It is essential that the emergency contact has details of the visit, including location, transport and WHO is on the visit. This is particularly pertinent to regular routine visits (e.g. sports fixtures) where participants may not turn up on the day, staff may change due to sickness or a venue change because of the weather. In this instance the Visit Leader must either update the details on EVOLVE prior to leaving or leave the written updated details with the emergency(base) contact. There may also be a system of 'checking in' before, during and after a visit with the emergency (base) contact along with a plan of action if the checking in doesn't happen on a particular occasion. This may involve a quick phone call or sending AND receiving of a text message to say that everything is going well. This is very important in situations where staff may be operating alone (e.g. expeditions) or where visits are more complex in nature.

### **To be taken on the visit:**

- Emergency action procedures card (Appendix a)
- First aid kit
- Fully charged mobile phone
- Accident form or other method of recording details e.g. phone
- Learner AND staff/volunteer medical, dietary, emergency contact information and swimming ability details (if appropriate). Information must be current at the time of the visit (can be retrieved via SIMS/EVOLVE link for learners but not staff).
- Risk management form(s)
- Details of Plan 'B' (if needed)
- Evidence of parental consent if travelling abroad (if needed)

For more complex visits, e.g. visits abroad, other documents and information may be required to be at hand e.g. passports, GHIC cards, booking forms, visas, hotel and tour operator details, insurance details etc. Further details can be found [here](#) in NG.

## **16) Data Protection and Record keeping**

The processing of personal data must comply with the Data Protection Act 2018 (DPA) which includes the General Data Protection Regulation (GDPR).

It is essential that the visit leadership team has access to up-to-date information to manage the welfare of young people. This typically includes emergency contact details and medical, dietary, and other considerations such as confirmation of swimming ability.

Establishments must have a mechanism in place for obtaining this information, updating it, and communicating it to those who need it. Where the information is transcribed to a summary sheet, or where a database such as the Student Information Management System (SIMS) is used to provide a summary, there must be a process to ensure the accuracy and currency of the information.

Information may be gathered in any way that is effective and secure, such as an annual form, visit specific form, tear-off reply slip, website portal, email etc.

There should be a robust arrangement for keeping welfare, medical and emergency information up to date. Sensitive information should be kept secure but accessible and understood by those who need it, including relevant leaders from other organisations. Consideration should be given to how that information is carried. This might include copies of medical forms, a printed summary sheet or electronic data storage. You should ensure that individuals' confidentiality can be protected, and personal information securely disposed of when it is no longer needed.

If the visit has been planned and approved using EVOLVE, establishments do not need to keep paper copies of planning forms. Parental permission slips may be destroyed after 3 months if no incident has occurred.

If there has been an accident/incident on a visit, establishments must ensure that the LA is notified according to their procedures and that a copy of the EVOLVE visit form, along with the completed incident form and permission slips are sent to the appropriate person.

The LA will keep accident/incident records until the young person reaches the age of 21 (or for 3 years in the case of an adult). Establishments therefore **do not** need to retain records of accidents/ incidents reported to the LA, unless they wish to do so for their own purposes.

For further data protection information, [click here](#) for NG.

## **17) Monitoring**

It is a statutory requirement for employers to monitor the implementation of their health and safety arrangements.

### **Monitoring by the LA**

The LA will monitor schools periodically to ensure compliance with this policy. The LA will contact EVCs to notify them of an upcoming monitoring visit and written and verbal feedback will be given to the EVC within 2 weeks of the visit.

### **Internal monitoring by the Head/EVC**

The Head/EVC must monitor Visit Leaders at least termly to ensure compliance with this policy. This should include scrutiny of standards of visit planning and organisation as part of the visit approval process and occasional observation of visit leadership.

Following any observation of visit leadership, it is good practice to provide the VL with verbal and written feedback and recommendations for further training if necessary. A copy of the observation report should be given to the VL and another copy kept on file by the establishment or uploaded onto EVOLVE. An example of a monitoring form can be found in the 'resources' section of EVOLVE.

NG provides further details [here](#)

## **18) Evaluation and review**

Feedback from monitoring will be used to review procedures to ensure that they meet the standards expected for visit organisation and leadership and to identify further training needs.

As part of good practice and review, establishments are encouraged to evaluate each visit (or series of visits). On EVOLVE, once a visit has taken place, it will move to the Visit Leader's 'evaluate' tab where staff are asked to comment on the success of the visit according to their intended outcomes. This need only take a minute or two but is particularly important to record any learning points to ensure the success and safety of future visits.

NG provides further details [here](#)

## **19) Managing an incident, accident, or emergency**

If you are the Visit Leader managing an incident that occurs whilst on a visit, you must follow the procedures set out in the Emergency Action Procedures card (**Appendix a**). Your emergency (base) contact should be notified and will help to manage the incident.

The emergency (base) contact should refer to the Incident Management Flowchart (**Appendix b**) and record all information known to date about the incident on the Emergency (base) Contact Form (**Appendix c**). Any immediate actions or requests for assistance should be discussed with the Visit Leader (or person informing them about the incident).

It is particularly important to keep a log of all calls, decisions made, and actions taken. An Incident log sheet can be found in **Appendix d** for this purpose.


The emergency (base) contact should then refer to their 'Critical Incident Plan' if there is one and assess whether the incident can be managed internally or whether additional assistance is required from the local authority in establishing an 'Emergency Response Team'.


Any safeguarding disclosures and/or concerns must be reported to the DSP/safeguarding lead as per the [Safeguarding Wales](#) and local arrangements.

Following the incident, any relevant accident/incident forms should be completed and forwarded to the Health and Safety Officer. The visit/incident should be evaluated on EVOLVE and staff should be informed of any changes to procedures including risk management.

Emergency procedures should be tested periodically to check that they work.

NG provides further details [here](#)

		<h2 style="color: red;">EMERGENCY ACTION PROCEDURES FOR VISIT LEADERS</h2>	<p style="color: green;">Jan 2026</p>
<p><b>FIRST RESPONSE</b></p> <p>1.Ensure that all young people and staff are safe from further danger and are cared for.</p> <p>2.Ensure that all necessary steps are taken to provide medical care and rescue of all who are injured or missing.</p> <p>3.In a medical emergency abroad, you must call the insurers, <b>AIG</b>, who will give advice and assistance (see over).</p> <p><b>NEXT STEPS</b></p> <p>1.Contact your emergency (base) contact as soon as possible, giving full details of what has happened, to whom, where, when, any witness details and what has happened since. Give them a telephone number where you can be contacted.</p> <p>2.If you are unable to contact your emergency (base) contact, call Children, Learning, Skills &amp; Economy (CLSE) or MonLife emergency contacts (see over).</p> <p>3.If abroad, notify the foreign office consular assistance.</p> <p>4.If child abuse is suspected, contact your safeguarding lead or the police (if in immediate danger).</p>		<p>5.In the event of a fatality, notify the police.</p> <p>6.Retain all evidence in an unaltered condition.</p> <p><b>WARNINGS AND ADVICE</b></p> <p>1.Brief all staff and young people so that they stay calm and understand what to do to stay safe.</p> <p>2.As soon as possible, make a written record of all that happens – stick to the facts.</p> <p>3.<b>DO NOT SPEAK TO THE MEDIA</b> other than to refer them to the Communications Team (see over).</p> <p>4.Do not allow young people or staff to phone home or go online until contact has been made with the relevant professionals.</p> <p>5.Never admit liability of any sort.</p> <p>6.Do not allow anyone to see young people or staff without an independent witness present.</p> <p>7.No one, unless in a relevant official capacity has the right to see anyone who does not wish to see them. If someone tries to force confrontation, do not respond, and call the police.</p> <p>8.Be as compassionate as possible with everyone involved.</p>	

		<h2 style="color: red;">EMERGENCY CONTACT TELEPHONE NUMBERS</h2>	
<p><b>EMERGENCY SERVICES: 999 OR 112</b> (112 for 70+ countries abroad, any mobile network)</p>			
Emergency Planning Duty Officer (out of office hours)	<b>0300 123 1055</b>	Emergency Planning Team (office hours)	<b>01633 644092/91 01633 644830</b>
CLSE Emergency Contacts	<b>07766 504389 (NW) 07826 894055 (MJ)</b>	MonLife Emergency Contacts	<b>07768 055408 (NJ) 07952 310209 (MW)</b>
Communications Team	<b>07518 663496 (PS) 07896 014614 (RJ)</b>	Outdoor Education Adviser	<b>07966 158868</b>
<b>AIG</b> Insurers Emergency Assistance Helpline (24hr) (Policy No.: <b>0010628276</b> )	<b>+44(0)1273 552922</b>	Foreign, Commonwealth and Development office (24hr)	<b>+44 (0)207 008 5000</b>
Insurance Manager	<b>01633 644318/ 07890 401431</b>	MCC General (office hours)	<b>01633 644644</b>
DofE Development Officer	<b>07516 352446 (AW)</b>	Health & Safety Adviser	<b>07792 558027 (KT)</b>
<b>ESTABLISHMENT CONTACTS:</b>		<b>LOCAL HOSPITALS (A&amp;E AND 24HR):</b>	
Your phone number		Cwmbran (The Grange)	<b>01633 493100</b>
		Cardiff (Uni Hospital Wales)	<b>029 20747747</b>
Emergency (base) contact number(s)		Swansea (Morrison)	<b>01792 702222</b>
		Merthyr Tydfil (Prince Charles)	<b>01685 721721</b>
Head/Manager / EVC contact number		Bridgend (Princess of Wales)	<b>01656 752752</b>
		Llantrisant (Royal Glamorgan)	<b>01443 443443</b>

## INCIDENT MANAGEMENT FLOWCHART

Appendix b

**Record** all information received about the incident on the Emergency (base) Contact Form (**App c**)  
**Start and maintain** an Incident Log sheet (**App d**)  
**Ensure** the phone is constantly manned until the incident is resolved

If necessary, call the emergency services on **999 or 112** (112 for 70+ countries, any mobile network)

**Do not speak to the media but direct all enquiries to MCC's Communications Team**

Implement your establishment's Critical Incident Plan (if available). If not, assess the situation as quickly as possible and consider whether local authority assistance is required?

NO

YES

### NO LA assistance required

**Inform** the LA for information purposes, including the Director for the establishment involved and a member of the Communications Team

Continue to liaise with the visit leader until the incident is over

### LA assistance required

**Contact** the LA emergency contact(s) for your department **and** the Emergency Planning Team (EPT).

The EPT will establish an Emergency Response Team (ERT) consisting of relevant officers, including the Communications Team who will deal with the media

The ERT will work with the establishment for as long as necessary

For medical/evacuation emergencies abroad, contact MCC Insurers, American International Group (AIG), quoting Policy Number **0010628276**

For incidents on a DofE venture, contact the DofE Development Officer

Inform the Outdoor Education Adviser

Gather written statements from staff/adults/young people involved, where necessary

**EMERGENCY (BASE) CONTACT FORM**

*The Emergency (base) contact (receiving information relating to an emergency incident involving an educational visit) should use this form as a prompt to ask for and record as much information as possible:-*

**Date of Call:**

**Time of Call:**

**Name of Caller:**

**Contact Tel. No:**

**School / Establishment they are travelling with:**

**What is their role within the Group (Visit Leader / Assistant Leader / Helper / Participant)?**

**What is their current location?**

**Description of what has happened.** *Try to ascertain the nature of the emergency, where and when it occurred and whether emergency services are on scene?*

**Are there any casualties?**

**Any immediate assistance required?**

**Who else has / needs to be informed?**

**What action is needed now?**

**INCIDENT LOG SHEET**

Incident:.....

Date: .....

Page No: .....

Time 24 Hr.	Message From	Message To	Contact Number	Message / Action / Rationale

<b>Policy Version Control</b>	
Title	Outdoor Learning and Off-site Visits Policy 2026
Owner	MCC, MonLife, Clare Adams
Approved by	CLSE DMT, MonLife DMT, JAG
Date	January 2026
Version No.	3 (previous title 'Educational Visits Policy')
Review date	January 2029
Status	FINAL
Consultation	CLSE DMT, MonLife DMT, Health & Safety Committee, MonLife Gilwern OA, EVCs and Headteachers, OEAP National Guidance, Safeguarding, Inclusion, ALN, Communications, Transport, Emergency Planning, Insurance, Conwy OEAP policy