

## **Smith's Wood Primary Academy**

### **Policy and Procedures for Management of Educational Visits 2015**

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## **Section 1**

### **Educational Visits Policy**

#### **1.1 Introduction**

1. This document has been written with due regard to the Good Practice Guide *“Health and Safety of Pupils on Educational Visits (HASPEV)”* published by the DfEE in 1998 and the Supplements published by the DfES in 2002. It forms the Educational Visits Policy for all schools and colleges within the Local Authority of Solihull.
2. For Schools licensed to offer D of E Expedition work additional policy, procedure and guidance has been produced by Solihull D of E Office
3. These policy and the guidance documents are intended to inform all those in Education and Children’s Services Directorate who have a responsibility for the management of young people or adults taking part in educational visits. The information is designed to enable leaders and potential leaders to acquire the necessary knowledge, experience and confidence required to lead safe and rewarding visits and, where necessary, seek the appropriate further advice.
4. Young people from Solihull schools undertake visits for a wide variety of educational purposes. These range from half-day visits to residential experiences, both locally and abroad. The activities are similarly broad ranging from adventurous pursuits in the mountains or on the water, to urban and rural visits. The Education and Children’s Services Directorate acknowledges the value of such experiences and the contribution they make to the development of young people. Various subject areas in the National Curriculum require, by implication or directly, practical experience in the environment for the effective delivery of the syllabus. Residential experiences and involvement in challenging situations also make a significant contribution to personal and social development.
5. Educational visits have a variety of forms, aims and approaches. The general principle, underpinning this guidance, is to ensure the safety and welfare of young people and staff. It is acknowledged that such activities make a valuable contribution to the experiences of young people. Provided that the aims and objectives are clearly formulated, and the organisation is methodically carried out, activities will be not only relevant and effective but also safe.
6. Any visit or journey will inevitably entail a considerable voluntary commitment by staff. This voluntary input and the responsibility incurred in the supervision of young people on any educational visit is recognised and valued by the Authority which supports and promotes such ventures.
7. Heads should be mindful of the requirements of the Children Act 1989. It is up to Heads to judge in each individual situation the amount of contact time during

which volunteers may have access to young people, and where substantial, the necessity to request a Criminal Record check. It will be for the Head to decide whether to allow any volunteers to take up duties prior to a positive clearance. It is also the duty of the Head or organiser to decide whether a volunteer possesses the personal attributes needed to take responsibility for the care of groups. Guidance on Disclosure-Barring is shown in Appendix E

8. It is important that the young people are equipped with the necessary skills and techniques to enable them to make sound judgements before ventures are undertaken. Experience should be acquired gradually and progressively as the young people achieve their independence.
9. The aims of outdoor education include encouraging young people to become self reliant, self confident, responsible and to act independently. This may develop from participation in independent travel skills, project work, fieldwork, environmental studies, adventurous activities and the Duke of Edinburgh's Award, amongst other activities. Small group and independent work that is not under the direct supervision of a member of staff can be a most worthwhile approach. However, greater care is required in the management of such activities.
10. Accordingly, these guidelines have been designed to provide a framework of good practice in the organisation of educational visits and to identify a means by which they may be safely sustained and developed. The need for clear, unambiguous regulations and guidance has to be set against the difficulty of framing statements to cover all eventualities. Every effort has been made to ensure that advice is relevant to any visit or journey undertaken.
11. These guidelines are appropriate to any occasion where young people are participating in any activity whilst legally in the care of the LA including:
  - All off-site curriculum activities
  - All off-site extra-curricular activities
  - Situations involving off-site activities arranged by external providers
  - Any adventurous activity where there is a duty of care to young people
12. Whilst these guidelines apply to educational visits, the basic principles of good and safe practice outlined also apply when conducting activities on site. It is possible to introduce many of the activities mentioned in these guidelines in school or youth club environments.
13. Participation in educational visits is subject to pupils demonstrating good behaviour in school. (see Behaviour Policy) This applies to all pupils. Participation on residential trips may be subject to a pupil achieving an average level of attendance (currently 95%). Senior staff will decide any such decisions.

## 1.2 Duty of Care

14. There is no question of any automatic legal liability for any injury sustained by a young person on an educational visit off site. When a Party Leader takes a group of pupils off site he or she is ***“in loco parentis”*** (“in the place of the parent”) and the duty of care expected is that of a careful parent in similar circumstances. This duty is continuous and cannot be delegated.
15. In practice this means that Party Leaders must exercise sound judgement and ensure that their actions:
  - Are compatible with those expected of a careful and prudent parent
  - Take account of the age and known propensities of particular young people
  - Are in line with well developed and accepted practice
  - Are in line with current LA guidelines.
15. Whether accompanying the party or not, a Head’s responsibility is (additionally) to ensure that the Party Leader and helpers have made the proper preparations and have sufficient experience and ability to accept the responsibility for the care and welfare of the young people during the journey or visit. Provided this has been done the Head’s personal responsibility has been discharged.

## 1.3 Special Needs

16. In line with the Authority’s Equal Opportunities Policy, young people and adults with Special Needs have an entitlement to participate in a rich and varied educational activity programme.
17. In order for young people and adults to participate in activities and to maintain high quality teaching and learning, staffing ratios need to take into account individuals special needs.
18. Any programme offered should maximise the attainment and achievement of everyone participating, helping to develop his/her self esteem, self confidence and citizenship skills (e.g. living in a community with others – often denied due to his/her special needs).
19. It is important, if a provider is being used, to identify the specific roles of the Group Leader and Instructor. The Instructor **must** be made aware of individual needs within the group.
20. When working with groups with Special Needs it is important that Group Leaders have an established relationship with the group and that any instructor is made aware of individual problems.

## 1.4 Adult / Pupil Ratios

21. It is recommended that pupils on educational visits should be accompanied by a minimum of two adults (depending upon the level of supervision dictated by the risk assessment), where there are two adults, one of them must be a teacher at the school and the other an employee. Where there is only one adult supervisor, that person must be an employee. School pupils cannot be included as adult escorts. It is strongly recommended that, subject to availability all visits involving an overnight stay should have at least one accompanying adult of the same sex as the students. Adults employed by the venue or an agency must not be counted when calculating the adult / pupil ratio.

Where a visit is local (10 miles) and does not extend the school day by more than one hour (before or after), it may be possible for a single adult to accompany the pupils, subject to assessing the risks.

There are many variables and it is not possible to give precise staffing ratios to cover all situations. The following are a minimum. Heads may wish to improve these ratios according to the type of activity being undertaken, where very young children are involved or with groups with special needs. There should also be one extra supervisor available for emergencies when determining the ratio of groups with special needs. A risk assessment should be carried out to determine the ratios.

Minibuses should normally have an adult supervisor in addition to the driver. For longer journeys, two drivers are recommended. On coaches, there should be at least two adults in addition to the driver.

22. **Category A visits**

**These are day visits (*i.e. visits that take place within the normal school day or extend the school day by no more than one hour before or after the normal school day*), where the element of risk is similar to that normally encountered in daily life.**

Any off-site activity, however, will demand an awareness of rural or urban hazards and the exercise of due care.

*Examples of such activities may include farm visits, visits to sites of historic, commercial or cultural interest, most fieldwork, sports tours and leisure centre visits, local walks, journeys to the zoo or theatre etc.*

Adult / Pupil Ratios

PMLD refers to Profound and Multiple Learning Difficulties

Nursery	Under 5's	1 adult : 3 pupils	
Infant	Years 1-3 + Reception	1 adult : 6 pupils	
Junior	Years 4-6	1 adult : 15 pupils (max)	
Secondary	Years 7 and over	1 adult : 20 pupils (max)	
Special Needs:	SLD	1 adult : 3 pupils	Unless a risk assessment shows otherwise
	PMLD/Epileptic	1 adult : 1 pupil	

There may be occasions, particularly when using Authority approved transport or for journeys between "school" sites, where the above ratio may reasonably be varied as determined and directed by individual Heads.

Young people with challenging behaviour, or who are particularly disruptive, will require the necessary staff provision to be available to deal with any difficulties that may arise.

23. **Category B visits**

**B1) Visits which extend the normal school day by more than one hour before or afterwards, but do not involve any nights away from home.**

Adult / Pupil Ratios

Nursery	Under 5's	1 adult : 3 pupils	
Infant	Years 1-3 + Reception	1 adult : 6 pupils	
Junior	Years 4-6	1 adult : 15 pupils (max)	
Secondary	Years 7 and over	1 adult : 20 pupils (max)	
Special Needs:	SLD	1 adult : 3 pupils	Unless a risk assessment shows otherwise
	PMLD/Epileptic	1 adult : 1 pupil	

**B2) Visits involving any nights away from home (residence in a hotel, hostel, activity centre, holiday complex and camping).**

Adult / Pupil Ratios

Nursery	Under 5's	1 adult : 3 pupils	
Infant	Years 1-3 + Reception	1 adult : 6 pupils	
Junior	Years 4-6	1 adult : 10 pupils	
Secondary	Years 7 and over	1 adult : 10 pupils	
Special Needs:	SLD	1 adult : 3 pupils	Unless a risk assessment shows otherwise
	PMLD/Epileptic	1 adult : 1 pupil	

**B3) Adventure Activities having an element of risk requiring leader competence and qualification.**

These activities fall in the scope of the Adventure Activities Licensing Authority (AALA) unless mentioned in the guidance. Such activities may take place in hazardous or remote environments and generally require specific skills, experience and safeguards in order to contain risk at an acceptable level.

*Examples of these activities are mountain and moorland walking, canoeing, climbing and camping and are generally referred to as outdoor pursuits.*

Adult / Pupil Ratios

Adult / Pupil ratios and the levels of Leader competence vary according to the activity to be undertaken.

24. **Category C visits**

- C1) All visits and residential visits abroad;**
- C2) Activities having an element of risk, but for which, there is no register of approved leaders;**
- C3) Activities where there is a level of uncertainty about the safe conduct of that particular activity.**

*Examples in the latter case may relate to the nature of the activity, the staff involved or the location in which the proposed activity takes place.*

Adult / Pupil Ratios

Junior	Years 3-6	1 adult : 6 pupils, plus 1 extra adult
Secondary	Years 7-13	1 adult : 10 pupils, plus 1 extra adult
Special Needs:	SLD	1 adult : 3 pupils, plus 1 extra adult
	PMLD/Epileptic	1 adult : 1 pupil, plus 1 extra adult

- 25. For any visit (all categories) where the party subsequently splits into sub-groups, the Party Leader will need to consider how many adults are needed to accompany each sub-group (at least two adults per sub-group).
- 26. Female and male adult supervisors should accompany mixed groups of young people. Overnight trips must be supervised by at least two adults to match the sex mix of the students.
- 27. An improvement on these basic adult: pupil ratios and staffing may be required dependant upon the:
  - Nature and location of the activity



- Gender, ages, attitudes, disability, behaviour and competence of the group members
  - Duration of the activity
  - Weather conditions
  - Availability of prompt outside assistance
  - Type of accommodation
  - Experience and competence of the staff. (Inexperienced staff should be counted as group members).
28. The longer an activity or visit lasts, the more essential it is to have an adequate staffing ratio. When faced with the continuous responsibility of being *'in loco parentis'* staff cannot work efficiently and maintain the necessary degree of alertness and concentration if they are overtired. Adequate provision must be made for staff to have breaks and relaxation. The ratio must also take into account any domestic role that the staff may have, such as the preparation and supervision of meals.

#### **Staff accompanied by their own children**

29. Due to the likelihood of conflict of role, staff should **not** be accompanied by their own child or children without the specific agreement of the Head and other leaders. Where agreed, some adjustment may need to be made to the staffing ratio.

#### **The use of Parents and other Voluntary Supervisors**

The use of parents and other volunteers under the direction of the party leader is acceptable. The principle of being *'in loco parentis'* applies to them, but a court is unlikely to expect the same standard of care from them as it would a teacher, who is employed to exercise supervision. Heads and party leaders should bear this in mind when allocating responsibilities and they may find it advisable to keep children with problems or behaviour difficulties under their own supervision.

**Note:** The Authority defines 3 categories (A, B and C) for visits but also accepts the Adventure Activity definitions recognised by DfES (Appendix D).

## 1.5 Approval for Educational Visits

30. All Party Leaders undertaking educational visits /activities must follow the Authority's system of approval, as detailed below. There are three categories of activities and associated approvals:

Cat'	Type	Risk Assessment:		Approval by:
		Recorded?	Copy to LA.?	
<b>A</b>	Day visits in UK	Yes	No	Head Teacher
<b>B1</b>	Visits in UK extending the normal school day (>1 hr before or afterwards).	Yes	No	Head Teacher
<b>B2</b>	Overnight visits in UK	Yes	Yes	Head, Chair of Governors and LA
<b>B3</b>	Adventure Activities	Yes	Yes	
<b>C1</b>	Visits abroad (Day & Residential)	Yes	Yes	Head, Chair of Governors and LA
<b>C2/C3</b>	Higher risk Adventure Activities	Yes	Yes	

## Section 2

### Responsibilities for Educational Visits

#### 2.1 Terminology

The table below defines the terminology and roles of the wide variety of people to whom this policy is addressed.

<b>Governors</b>	Members of school governing bodies. It also includes Community Governors, members of Management Committees and other formally constituted groups which have delegated or devolved responsibility
<b>Head (teacher)</b>	The Head of the establishment, Youth Officer, Designated Officer or line manager to whom the party leader is responsible and from who initial outline approval is required.
<b>EVC</b>	The Educational Visits Co-ordinator is the member of staff in a school specifically involved in the management and planning of Educational Visits.
<b>Young People Parent(s)</b>	The participants or group members for whom the activities are provided. Including guardians or carers where the latter terms are more appropriate.
<b>Party / Team Leader</b>	The person who takes charge and has overall responsibility for the whole group undertaking an educational visit and the activities they undertake. Frequently the party leader will also be acting in the role of a group leader.
<b>Group Leader</b>	The person who is responsible for managing a group engaged in a particular activity, (usually a teacher, youth worker, or instructor) under the direction of the party leader. At times, a number of group leaders may be answerable to the party / team leader. In certain cases, such as when using the services of a commercial provider, the “group leader” may work with an “instructor” to whom the responsibility for the specialist instruction and decision making has been delegated. In these cases areas of responsibility need to be understood and agreed.
<b>Supervisor</b>	Any other person with a level of responsibility within the group.
<b>Technical Adviser</b>	Individuals with a high level of experience in a particular activity who are able to make judgments about the competence of others within their area of expertise and are named in the relevant sections of this document.
<b>School</b>	Also includes Youth Groups and any other place where the Authority has a legal duty of care.

31. The Head Teacher, Governing Body, Management Committee and the Authority have responsibilities and a legal duty to ensure that educational visits are conducted in such a way that participants and staff are not subjected to unacceptable levels of risk to health and safety. Educational visits should comply with the establishment's Health and Safety Policy statement.
32. The Head Teacher and Governors / Management committee must:
- Be satisfied of the competence (training and experience) of staff undertaking and supervising the various activities.
  - Ensure that appropriate training is provided where necessary.

## **2.2 Governors' responsibilities**

33. The governing body should ensure that all visits and journeys are approved and that:
- Visits have specific and stated objectives.
  - Proposals comply with Regulations, Codes of Practice and Guidance.
- This responsibility may be delegated to the Head Teacher where the proposed visit is a repeat of one previously approved by the Governing Body provided that:
- The visit is within the United Kingdom
  - The visit is non-residential
  - No significant changes have been made to the itinerary since the previous trip

## **2.3 Head Teacher's responsibilities**

34. The Head Teacher has extensive responsibilities (listed in Appendix A), but broadly he/she should:
- Ensure that visits comply with Regulations, Codes of Practice and Guidance;
  - Ensure that the group leader is competent to lead the activity (Form 'D' can be used to record staff competencies) and to monitor the risks during the activity and that the team is suitably balanced (see 1.4 Adult / Pupil Ratios);
  - Be clear about his/her own role if taking part in the activity as a team member – i.e. they should follow the instructions of the Group Leader who has sole charge of the visit.
35. The Authority requires that each School has a senior member of staff with the responsibility for Educational Visits or a member of staff with suitable ability and the confidence to work within the environment of the Senior Management Team. The person will be known as the **Educational Visits Co-ordinator (EVC)**.

## 2.4 Educational Visits Co-ordinator's (EVC) responsibilities

36. The functions of the EVC are to:
- Support Party Leaders of educational visits, helping to establish the purpose of each visit and the procedures used to manage the risks identified for the programme;
  - Support the Head and Governors with decision making and approval;
  - Organise the induction of leaders, accompanying staff and volunteer helpers:
    - Selection and appointing of all potential leaders
    - Observation and monitoring of all leaders
    - Knowing how the activities are normally conducted or having recourse to sound advice about activities outside of their experience.
  - Organise the training of all leaders, accompanying staff and volunteer helpers which will commonly involve training such as first aid, hazard awareness, National Governing Body Awards etc.
  - Assess the competence of all leaders, accompanying staff and volunteer helpers. This will commonly be done with reference to an 'awarding body' such as first aid, but could also include practical observation or verification of prior experience.
  - Organise the emergency planning including the identification of an Emergency Contact for each visit.
  - Keep records for individual visits both as an indicator of staff experience and to include accident and 'near miss' reporting.
  - Review systems and monitor practice.
  - Liaise with the Authority to ensure that LA Guidelines are followed.

37. The EVC must be appropriately experienced and competent.

The term "Appropriate" takes into consideration the size of the school and the extent and nature of the visits planned. For example, the needs of an Infant school will be entirely different from a large Secondary school with an active Duke of Edinburgh scheme.

The criteria for "Experience" relates to the practice of leading, planning and delivering of educational visits. Evidence of this may be through qualification, but more usually will be through demonstrated practical leadership over many years of off-site visits.

"Competency" can be judged by the proven ability to manage the process of educational visits. Commonly, but not exclusively, this will be vested in a person on the senior management team of the school.

38. Each EVC will be supported in their functions by the Authority with:
- Selection and induction
  - Appropriate advice and guidance and training
  - Access to appropriate training for the EVC and all staff involved in leading educational visits
  - Monitoring

39. The EVC may well be involved in the planning and management of adventure activities led by staff in the school. Where this is the case, the EVC will support both leaders and the Head by ensuring that the employers' guidelines for leading activities are followed. This will involve:
- Ensuring that all leaders are competent
  - Checking that activity guidelines are followed
  - Obtaining specialist advice from a Technical Adviser as appropriate
  - Ensuring the proper delegation, control and storage of specialist equipment
  - Putting in place systems for monitoring activities and if this involves specialist activities, then using Technical Advisers as appropriate.

#### Assessment of Competence

40. It is the responsibility of the Employer to ensure the competence of those leading and supervising particular activities. An employer might be the Authority or a Governing Body and the means by which competency might be demonstrated could vary.
41. Competence is acquired by the process of on-going learning from accumulated experiences. Key aspects of competence include personal experience in the particular activity, up to date training and experience of working with appropriate groups. Whilst technical competence can be achieved through training events, safety judgements are more dependent on broad but relevant personal experience in the environment or the activity.
42. Attendance at training events should be regarded as enhancing personal experience but not as an alternative to it. Training may accelerate the process of acquisition of sound judgement, but does not replace the need for experience.
43. Educational Visits Co-ordinators (EVC) must record the competence levels of staff. Where appropriate and when there is any doubt about judging the competence of an individual to lead a particular activity, the guidance of the Authority's Outdoor Education Adviser should always be sought.
44. An assessment of technical competence may take into account any one or all of the following:
- National Governing Body (NGB) Awards
  - Local Validation.  
Where appropriate, an LA approval system may be devised operating in a similar way to NGB awards. Local validation will:
    - apply to the specific named individual
    - apply to named activities
    - not be transferable to other persons or organisations
    - require periodic revaluation and training
  - Site Specific Induction

45. Where appropriate individuals are specifically trained to cope with the unique demands of a particular named location, induction would take place on site and be conducted by a suitable Technical Adviser. In Category 'A' field study activities a highly experienced practitioner with knowledge of the planned venues may be appropriate.

#### Role of a Technical Adviser

Technical Advisers are individuals with a high level of experience in a particular activity whose capability is recognised by the relevant National Governing Body. They are able to make judgements about the competence of others within their area of expertise. The names of Technical Advisers acting on behalf of the Authority may be obtained by reference to the Outdoor Education Advisor.

### **2.5 Team Leader's responsibilities**

46. One teacher, the Team Leader, shall have overall responsibility for the supervision and conduct of the visit and shall have regard to the health and safety of the group. Specific tasks / responsibilities are identified in Appendix B.
47. All Team Leaders should be mindful of the Authority's child protection policy procedures. The Team Leader should be a qualified member of staff e.g. a teacher, youth leader or social worker. It is the duty of the Head to decide whether a potential leader possesses the attributes needed to take responsibility for the care of groups.
48. In considering approval for a proposed programme the following factors will need to be considered in relation to the competence of the Team and Group Leaders:
- Personal level of skill and recent experience.
  - Experience in supervising participants of the age and ability level concerned.
  - Experience of the location and activities to be undertaken.
  - Organising ability and sense of responsibility.
  - Level of support available.
49. In addition to being responsible for the planning and preparation of the venture and the emergency procedures, the Team Leader is responsible for briefing the accompanying staff, supervisors, parents and helpers and any Instructors if a third party is involved. A briefing must take place before an activity or journey.
50. The Team Leader must brief also the young people concerning their tasks, arrangements, organisation and the expectations that are being placed upon them.
51. Prior to the visit, the Team Leader must have defined and communicated the contingency plan for leadership responsibility in case the party becomes divided, or in the absence of the leader.

52. Where there is more than one teacher/leader involved, a Team Leader should be appointed who has authority over the whole group. If more than one “school” is involved an overall Team Leader should be identified, usually the person with the most experience in leading such visits.
53. All adult supervisors, including teachers and parent/volunteer helpers, must understand their roles and responsibilities at all times. In particular, all supervisors must be aware of any young people who may require closer supervision, such as those with special needs or behavioural problems.
54. The programme for a visit should be arranged by the Team Leader and any leisure time incorporated into that programme should be appropriate to the age and ability of the young people concerned. Leisure periods should be structured and supervised. Older members of a party may be authorised by the Team Leader to undertake some leisure periods without direct supervision. However, the Team Leader should ensure that the location, duration and nature of the leisure activity are understood by all the young people concerned. (There is no such thing as an unsupervised group, even during free time.)

## **2.6 Supervisory Teachers’ responsibilities**

55. Supervisory Teachers on educational visits
  - Act as employees of the Authority, whether the visit takes place within normal school hours or outside those hours, by agreement with the Head Teacher and Governors;
  - Must do their best to ensure the health and safety of everyone in the group and act as any reasonable parent would do in the same circumstances;
  - Must (as well as all other adults assisting the Team Leader) consent and agree that the Team Leader has full authority to reasonably direct their supervision of the pupils;
  - Should abide by all laws when abroad and be aware that there may be local customs that should be considered.



## Section 3

### Arrangements / Procedures for Educational Visits

#### 3.1 Basic Principles of Safe Practice

56. The basic principles of safe practice planning and undertaking educational visits include:
- a) Ensuring that leaders are competent and effective;
  - b) Ensuring effective supervision and staffing ratios;
  - c) Ensuring that risk assessments are recorded and communicated for each visit.
  - d) Ensuring appropriate levels of first aid provision.

#### 3.2 Competence and effectiveness of Staff

57. It is essential that all staff responsible for the leading, planning and execution of educational visits or outdoor activities are competent to conduct such activities safely.
58. There is no substitute for experience, qualification and competence. A breadth of experience will enhance a leader's ability in making sound judgements as to what constitutes a dangerous situation. Local validation, National Governing Body Awards and a varied background of recent and professional experience in related activities enhances safe practice, developing knowledge and expertise in the on-going process of risk assessment.

#### 3.3 Effective Supervision and Staffing Ratios

59. For every educational visit there must be a Team Leader who manages the whole visit. Whilst at times the group will be managed as a whole depending upon numbers, for many activities it is better for groups to be small, each with a group leader. Supervision will at times be directly with the Team Leader and at times with individual group leaders.
60. Supervision works best when:
- The aims and objectives of the visit are clearly understood by all involved;
  - The visit and activities have been carefully and thoughtfully planned;
  - Participants have been involved in the overall plan, including identifying potential hazards;
  - Clear guidelines for standards of behaviour have been agreed;
  - The young people have had prior contact with supervisors;
  - Everyone involved in the visit understands the supervision arrangements.

61. Supervision can be close or remote:
- **Close** supervision occurs when the groups remain within sight and contact of the supervisor.
  - **Remote** supervision occurs when it is planned that the group works away from the supervisor. This includes “free time” during visits, including residential visits.
62. For all supervision, the Group Leader:
- Will normally be a teacher or Youth Leader;
  - Is responsible for the safety of their group at all times;
  - Will have a clear plan of the activity to be undertaken and its objectives;
  - Needs to anticipate potential hazards and act where necessary;
  - Continuously monitors the appropriateness of the activity, the physical and mental condition of the group members and the suitability of the prevailing conditions;
  - Needs to exercise appropriate control of the group;
  - Will have a clear understanding of the emergency procedures and be equipped to carry them out.
63. Potential danger points can occur when re-arranging groups. In particular:
- When a large group is split into smaller groups for specific activities;
  - When groups transfer from one activity to another and change supervisor ;
  - During periods between activities;
  - When small groups re-form into a large group.
64. It is therefore most important that the supervisor:
- Clearly takes responsibility for the group when their part of the programme commences;
  - Clearly passes on responsibility for the group when their part of the programme is concluded, together with any relevant information.
65. Supervision ratios will need to be set for each visit and activity, according to the aims and objectives and a risk assessment of potential hazards. The factors to be taken into consideration will include the:
- Particular activity
  - Group involved, and the needs of individuals within the group
  - Environment in which the activity takes place
  - Other helpers. Depending upon their personal experience helpers may need to be counted as a supervisor or as a participant
66. For all supervision, the participant will:
- Know who their group leader is at any given time and how to contact them
  - If appropriate, have a ‘buddy’
  - Have been given clear, understandable and appropriate instructions
  - Not normally be on their own unless suitably trained

- Alert the group leader if someone is missing or in difficulties
  - Have a meeting place to return to, or an instruction to remain where they are, if separated
  - Understand the expected standards of behaviour.
67. To ensure good practice for close supervision, group leaders will:
- Have prior knowledge of the group
  - Carry a list of all group members
  - Have prior knowledge of the venue
  - Not normally be on their own unless suitably experienced to make required decisions
  - Check regularly that the group is all present. Visual checks for small groups (less than 7) and headcounts for larger groups (greater than 6)
  - Have appropriate access to first aid
68. In addition, when supervision is remote, groups must be sufficiently trained and assessed as competent for the level of activity to be undertaken, including first aid and emergency procedures:
- Participants will be familiar with the environment
  - Clear and understandable boundaries will be set for the group
  - Clear lines of communication between the group, Team Leader and the Head
  - Team Leader needs to monitor the group's progress at appropriate intervals
  - Clear arrangements for the abandonment of the activity
  - Clear point at which the activity is completed
69. The process of supervision also involves "school based" management. For each visit they must:
- Provide named contact(s) who will be available at all times
  - Monitor the group's progress whilst away
  - Provide an alert should groups not report back when expected
  - Provide emergency back-up services as appropriate, this may include a mobile phone if necessary
70. Other helpers:
- May include support assistants, volunteers, and parents;
  - Must have received training appropriate to the role they will be undertaking;
  - Must have their role and responsibilities clearly explained and understood by all involved in the visit, from the Head to the participant.

### 3.4 Risk Assessment

71. Safe practice in the outdoor environment is not about eliminating risk: off-site activities, by their nature, will entail some level of risk. It is one of the factors that enable valuable lessons about awareness and responsibility to be learnt. It is the role of the provider to manage the risk to an acceptable level and to prepare young people progressively to cope with the level of risk inherent in the activity.

The Royal Society for the Prevention of Accidents (RoSPA) advocates the importance of preventative strategies in the management of risk. Whatever visit is proposed, an awareness of potential problems allows intervention before difficulties arise.

**Planning is essential and a pre-visit is therefore highly recommended.**

72. Risk assessments have always been carried out as part of any responsible team leader's preparations. However, legislation (Management of Health and Safety at Work Regulations 1999) requires that risk assessments must be recorded and the findings communicated to persons taking part in the activity.
73. Consequently, for each educational visit, a risk assessment must be made, recorded and communicated to pupils / parents and supervisory staff (irrespective of whether the visit is Category A, B or C). It is recommended that assessments are recorded on the **Educational Visit Risk Assessment Form 'B'**.
74. However, risk assessment is a process not just a document, starting in the planning phase of the visit and continuing through the end of the visit when the participants return to school. Changes to the itinerary, changes to the weather, incidents (whether minor or major) will give rise to the need to re-assess risk. The Team Leader and other supervisors should monitor the risks throughout visits and take appropriate action as necessary to control any risk changes.
75. Risk assessments may be generic (for routine visits) or individual (for every visit of a higher than normal risk). Any new ideas arising out of the post-trip evaluation should be fed back into the process.

#### **The Risk Assessment Process**

76. Consider the 'significant' hazards – i.e. those that might lead to the risk of serious accidents – and the actions needed to eliminate or at least minimise the risk. Use the 5 steps of the risk assessment process:
- i) Identify the 'hazards':  
*"Anything which could cause harm (e.g. an unguarded pool of water, or an assembly point on a busy road)";*
  - ii) Decide who might be affected by those hazards and the potential consequences;
  - iii) Consider what control measures are already in place (including supervision);

- iv) Calculate the 'residual risk' with the existing control measures:  
"*The likelihood that someone might be harmed by the hazard (e.g. falling into the water, or stepping from behind a coach into the road)*";
- v) Where the residual risks are anything more than low, put in place additional control measures to minimise or prevent harm, including steps to be taken in an emergency.

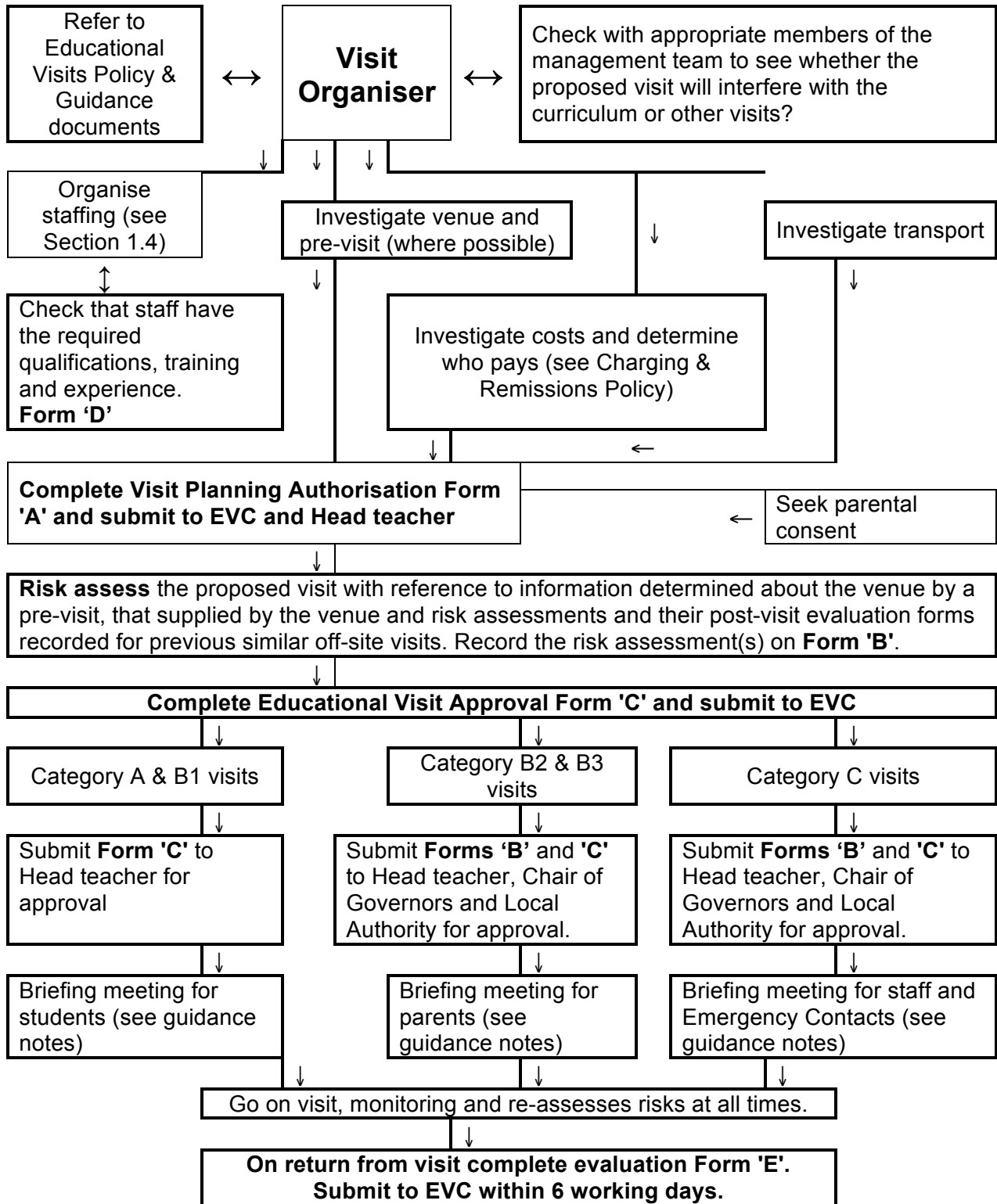
### Notes

- Reference to the "*Guidance for Management of Educational Visits*" document may assist you.
  - Think of each change of environment – from coach to car park, from hotel to beach – as a change of 'work area'. Health and safety legislation requires that you consider the safety of each member of the team as they enter and leave the work area and that you examine the area for conditions, equipment, or activities that could pose a hazard.
  - Detailed advice and training on risk assessment can be obtained through the Authority's Corporate Health and Safety Team.
  - An example of a risk assessment appropriate to off-site visits can be found in Appendix C
77. When the visit has been completed, it is good practice to review the risk assessment to measure the effectiveness of control measures and whether any additional unforeseen hazards had been encountered. The review should be recorded on the **Post Off-Site Visit Evaluation Form 'E'** and submitted to the Head Teacher and Educational Visits Co-ordinator following the end of the visit.

### 3.5 First Aid Provision

78. Team leaders should have a working knowledge of first aid. The level of knowledge or qualification required will depend upon the nature of the activity, the extent of outside assistance, the remoteness of the environment and the current health of the group.
79. A valid First Aid certificate is a pre-requisite for many National Governing Body Awards relating to outdoor activities but leaders should have a recognised procedure for help and assistance if they are unhappy about any aspects of first aid.
80. Team leaders who supervise water-based activities should take account of seasonal differences and be competent in water rescue and life saving techniques including cardio-pulmonary resuscitation, (CPR). This should be reflected in their qualification and experience.

### 3.6 Educational Visit Planning Flow Chart



**Notes:**

1. When submitted to the Local Authority for approval, Forms 'C' and the Risk Assessment Form 'B' must be received by the Authority at least 10 working days before the date of the educational visit.
2. Team Leaders are reminded to take copies of all relevant paperwork on the visit with them including:
  - Insurance documentation
  - Medical Identity Cards (E111)
  - Passports
  - Group Lists
  - Medical Consent Forms
  - Emergency Planning Documents.
3. Other items that Team Leaders are reminded to take on the visit:
  - Contingency money
  - First Aid Kit
  - Mobile Phones (and Chargers)
4. Leave behind 2 copies each of Itinerary, Group lists, Emergency contacts information:
  - Copy 1 to the nominated Emergency Contact(s)
  - Copy 2 to the Head Teacher's P.A.

### **3.7 Emergency Procedures**

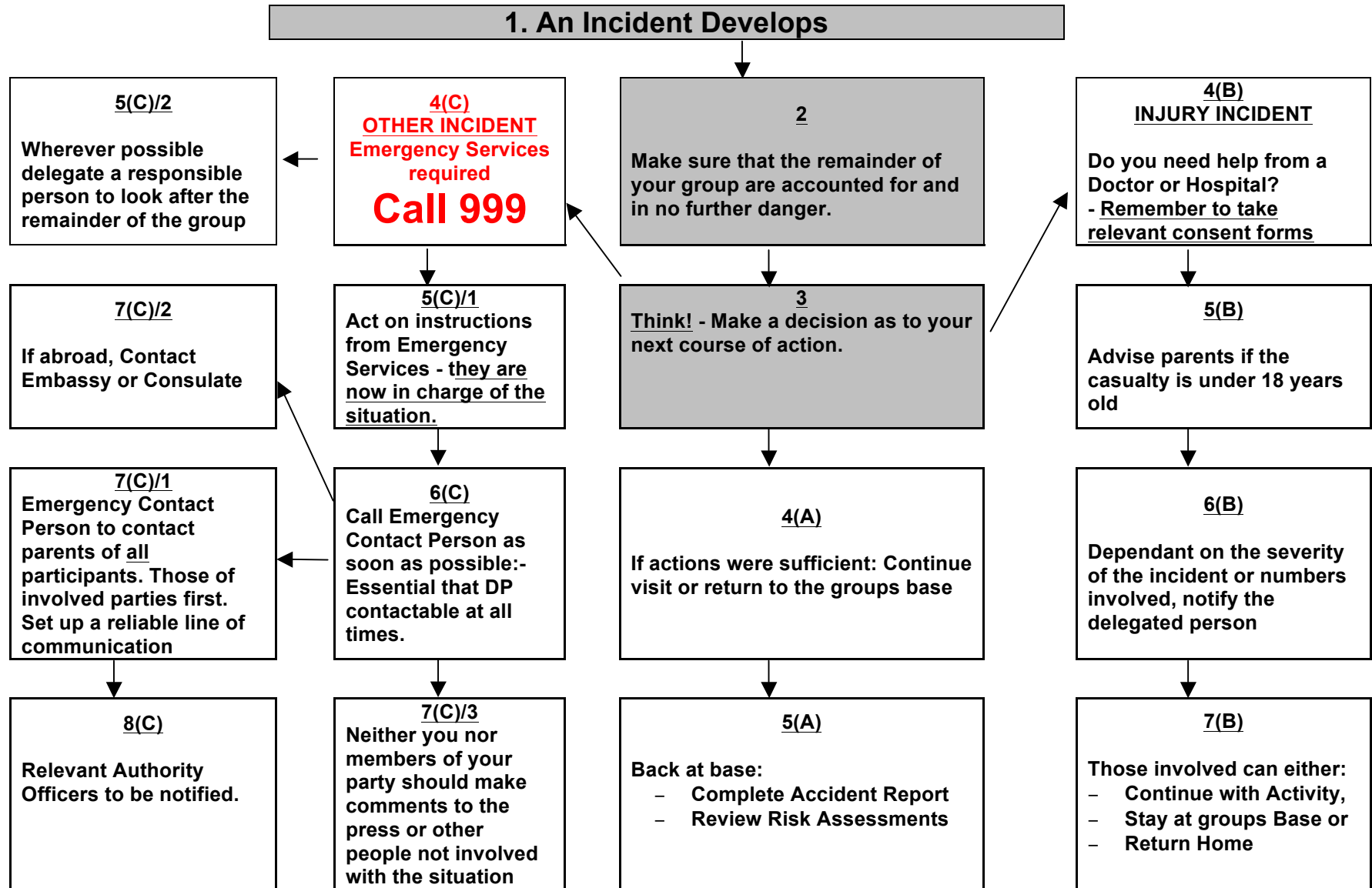
81. All those involved in the planning, approval and organisation of visits should recognise that risks involved will be minimised if careful attention is paid to planning, preparation and supervision. An emergency is difficult to define. There are many variables, given the extent of a problem that may arise and how Leaders may respond. Emergencies will require an on-the-spot response by the party leader.
82. In the event of emergency procedures being implemented, it is the responsibility of either the Head or the Authority to make all official statements to the media. It is important that the Leaders or party members do not make any comment either directly or indirectly to the media. No admission of liability should be made.
83. If it becomes necessary for young people to return either to School or their established base, separately to the rest of the group, it is important that an adult accompanies them. If this adult is not a parent or close relative then it should be a supervisor. Such an occurrence will affect supervision ratios and the party leader will need to make appropriate arrangements. Any serious injury or illness should be notified to parents as soon as possible through the party leader, or if the emergency services are involved, through the emergency contact person.
84. Training will be made available regarding these procedures via Educational Visit Co-ordinators and / or the Authority.

#### **3.7.1 Procedures to follow in the event of an Incident**

85. The **Incident Management Flowchart**, below, has been designed to be a practical field guide for managing emergencies that involve medical / injury incidents or when the Emergency Services may need to be called. Team Leaders may find it useful to take laminated copies of the flowchart and the supporting notes with them on the educational visit.



## Incident Management Flowchart for Visit Leaders



### 3.7.2 Actions to be taken by the Team Leader / Supervisor involved in the incident

86. The following notes extend the flowchart referred to above:

Ref.	Instruction	Notes
1	An Incident Develops	Assess the nature and extent of the emergency.
2	Make sure that the remainder of your group is accounted for and in no further danger.	Give first aid as appropriate: this will probably indicate the extent and severity of the situation.  For other incidents remove group from scene
3	Think! Make a decision. STOP, think and decide your course of action. Dependent on the severity of the situation you have 3 choices available to you	<ol style="list-style-type: none"> <li>1. You can solve the problem with first aid.</li> <li>2. The incident requires medical assistance, but NOT from the emergency services.</li> <li>3. You need help from the emergency services</li> <li>4. Non injury event dealt with locally</li> <li>5. Non injury event seek help from emergency services</li> </ol>
4(C)	<p style="text-align: center;"><b>Emergency Services Required</b></p> <p style="text-align: center;"><b>Call 999</b></p>	<p>This is the most serious route to take. Call the emergency services as required, give your name and address, location and telephone number followed by:</p> <ul style="list-style-type: none"> <li>• The location and time of the accident.</li> <li>• State the nature of the incident, details of injuries and who is injured.</li> <li>• The condition of those involved and where they are located.</li> <li>• State what action you have taken so far</li> </ul>
5(C)/2	Wherever possible delegate a responsible person to look after the remainder of the group	Having handed over to the Emergency Services, you are still responsible for the rest of the group.
7(C)/2	If abroad and appropriate notify the British Embassy or Consulate	

**Note:**

The Police have a responsibility for investigating all serious accidents or fatalities whether on the highway or in the hills. If the accident is in the United Kingdom the Police will endeavour to withhold the identities of casualties until parents have been informed.

Continued:

Ref.	Instruction	Notes
5(C)/1	Act on instructions from the Emergency Services.	<p>You should now allow Emergency Services to take control of the situation. However, whilst they have taken responsibility for the Duty of Care for your group or individual(s) involved in the incident, the Leader will need to care for the remainder of the group if necessary and will need to follow the groups own emergency procedures.</p> <ul style="list-style-type: none"> <li>• If required collect the remainder of the group and arrange for their return to base. If it is a serious incident staff and children may be in a state of shock. They will also require care and comfort.</li> <li>• Keep them informed. Protect them from any press or media attention.</li> <li>• An adult should accompany any casualties to hospital.</li> <li>• If necessary, arrange for one adult to remain at the incident site to assist or liaise with the Search/Rescue/Emergency Services.</li> <li>• If appropriate contact the group's off-site base and/or the Team Leader.</li> <li>• Advise party members not to contact other people</li> </ul>
6(C)	Call Emergency Contact Person as soon as possible and implement agreed emergency procedures.	<p>An Emergency Contact Person will need to be accessible at all times. Give the following information:</p> <ul style="list-style-type: none"> <li>• Your name, location and telephone number.</li> <li>• The location and time of the accident.</li> <li>• The nature of the incident.</li> <li>• Details of injuries and names of individuals involved.</li> <li>• The condition of those involved and where they are located.</li> <li>• What action you have taken so far.</li> <li>• Agree location and telephone numbers for future communication.</li> </ul> <p>The above information is very important. Write it down first to make sure all the facts are given. This will allow the appropriate action to be taken.</p>
5(A)	Return to the base or an agreed location to maintain communication and be with the remainder of the Group.	<p>If appropriate the following should be actioned:</p> <ul style="list-style-type: none"> <li>• A written report should be prepared by all adults involved whilst still fresh in the memory. A record should be kept of names and addresses of any witnesses. Keep any equipment involved in its original condition.</li> <li>• Restrict access to a telephone until the Head or delegated contact person has been informed and sufficient time has elapsed for the Head or delegated contact person to contact the parents of those directly involved.</li> <li>• Do not make statements to press/media or allow anyone else to make statements. Legal liability should not be discussed or admitted. Refer all press/media to the Local Authority</li> <li>• Between 9.00 a.m. and 5.00 p.m. (0121) 704 6000.</li> <li>• Depending upon the situation jointly decide the next course of action with the Team Leader, group and Emergency Contact Person.</li> <li>• On return to School complete accident/near miss forms.</li> </ul>

### 3.7.3 Actions to be taken by the Emergency Contact Person

87. Depending upon the situation all or some of the following will be relevant:
- a) Write down all the information that is given and confirm that it is correct. Fill in Appendix F “**Emergency procedures action plan**”.
  - b) As the incident is likely to be picked up by the media, it is vital to identify an alternative telephone number known only to the Team Leader and the contact person to maintain a free communication channel in the event of any future problems. If at all possible this should not be a mobile phone because of its limitations.
  - c) If the Emergency Contact is not the Head, then if possible notify the Head.
  - d) Notify the next of kin of the young people directly involved in the incident.  
Advise if appropriate of:
    - The nature of the incident
    - The location of the incident
    - Any travel arrangements that may be necessary
    - A means of continued communication
  - e) Notify the next of kin of the remainder of the group. Advise if appropriate of:
    - The nature of the incident
    - The well being of their child
    - A means of continued communication
  - f) At the discretion of the Head or Emergency Contact Person inform the Local Authority via the Emergency Planning Officer or the 24 hour emergency number.

In the event of a major emergency any further information will be issued through the Local Authority office dealing with the incident.

### 3.7.4 Action to be taken by the Local Authority

88. Depending upon the situation the Authority will:
- a) Ensure that all the relevant information has been received.
  - b) Appoint a designated Senior Officer to co-ordinate the response to the emergency and liaise with the press/media centrally.
  - c) The designated person should act as the on-going point of contact to which all involved should direct questions and requests.

### 3.7.5 Mobile Phones

89. Many Leaders now carry a mobile phone to save time in the event of an emergency. While it may be a useful item of additional equipment, technical difficulties arise easily especially in mountainous areas and when batteries cannot be recharged. Their use, therefore, should complement and not replace traditional safety and communication procedures.

**It is also likely that many young people will carry mobile phones: Leaders will have to decide a policy regarding the carrying of phones by the group.**

### **3.8 Insurance**

90. Schools are provided with a package of insurance by the Corporate Director of Resources some of which is provided centrally by the Authority and some of which the school must opt into if they wish to take them out.
91. All liability insurance required for on-site and off-site activities is covered as a part of the insurances provided centrally by the Authority. The additional insurance cover provided by ACE Insurance is for personal accident insurance for on-site activities and travel insurance (including personal accident cover) for educational visit activities.

**Note: Only those trips for which the appropriate authorisation has been completed will be covered by the ACE insurance arrangements.**

92. When planning trips either in the UK or overseas it is important that appropriate Travel Insurance cover is in place. For those schools that opt into the ACE scheme all trips are automatically covered, including ski trips etc, however if you are undertaking any hazardous activities then please contact the Insurance Section (tel. 0121-704-8200) to discuss any issues and concerns.
93. As part of the package with ACE you will have access to their website which is full of useful information in the planning of schools trips including advice on what risk assessments need to be carried out and other useful information. Details of how to access the website at [www.eduvia.com](http://www.eduvia.com) will have been sent to you as part of your annual renewal information. If you have any queries about the use of this website please contact the Insurance Section on 0121-704-8200.

#### **3.8.1 Motor Insurance**

94. It is an offence to drive without appropriate insurance and staff or voluntary helpers using their own vehicles on educational visits should ensure that their own motor insurance applies in these circumstances.
95. Motor Insurance which includes personal business use cover for the driver in question will normally automatically provide the appropriate cover. If anyone is in doubt about the adequacy of their cover they should obtain written confirmation from their own motor vehicle insurers that their cover is sufficient.
96. The onus for pointing out the necessity of having appropriate cover rests with the party leader.

Form 'A'

**EDUCATIONAL VISIT PLANNING:**  
**MANAGEMENT AUTHORISATION REQUEST**

**Team Leader:**

**Destination:**

**Purpose:**

**Details of any planned activities (if relevant):**

**Date / Time(s):**

**Depart:**

**Return:**

***If overnight,***

**Number of nights:**

**Type of accommodation:**

**Proposed Travel Arrangements:**

**Proposed Contractor (if known):**

<b>Supervision Arrangements (Teachers / Adults):</b>				
<b>Name</b>	<b>Leader, Supervisor?</b>	<b>First Aid Qualified?</b>	<b>Approved Minibus Driver?</b>	<b>Other Qualifications / Experience (relevant)</b>

**Number of Pupils:**

<b>Male</b>	<b>Female</b>	<b>Year Group / Age Range</b>

**Form 'A'**

<b>Financial Arrangements:</b>			
<b>Expenditure</b>		<b>Income</b>	
Transport		No. of pupils x cost requested per head (£)	
Admissions		Total from pupils (£)	
Insurance		Concessions x cost per head	
Staff Cover		Other income (grants, funds):	
Accommodation			
<b>Total expenditure</b>		<b>Total Income</b>	
<b>Comments (if any)</b>			

**Attachments: Proposed Letter to Parents**

**Authorisations:**

**Team Leader**

**Date:**

**Educational Visits Co-ordinator**

**Date:**

**Finance Officer**

**Date:**

**Head Teacher**

**Date:**

Form 'B'

**Educational Visit Risk Assessment**

<b>Visit Description</b>		<b>Team Leader</b>		<b>Year Group</b>	
<b>Date of Visit</b>		<b>Male Staff</b>		<b>Female Staff</b>	<b>Number of pupils</b>

<b>Hazard</b>	<b>Persons at Risk</b>	<b>Risk Description</b>	<b>Gross / Initial risk</b>		<b>Risk Level</b>	<b>Current Mitigating Action (Existing Controls /Precautions)</b>	<b>Net risk</b>		<b>Risk Level</b>	<b>Owner</b>
			<b>Likelihood</b>	<b>Impact/Severity</b>			<b>Likelihood</b>	<b>Impact/Severity</b>		

<b>Assessed by (Print)</b>		<b>Signed</b>		<b>Date assessed</b>	
<b>Approved by EVC (Print)</b>		<b>Signed</b>		<b>Date</b>	



## Form 'B' Educational Visit Risk Assessment:

### Risk Scoring Grid

Impact / Severity	High			
	Med			
	Low			
		Low	Med	High
	Likelihood			

#### Notes:

#### 1. Hazards

- Look only for hazards that you could reasonably expect to result in significant harm, i.e. requiring at least a hospital visit.
- Consider the stages of the visit in chronological order, examining the activities that take place at each stage. For example: assembling; journey, including rest stops; arrival; accommodation (if appropriate); activities; breaks; re-assembly; return journey (if different from outbound) and finally dispersion.

#### 2. Persons at Risk

- Staff / Students / All.

#### 3. Risk Description

- What harm could result to the Persons at Risk if there were no controls in place to control the Hazard.

#### 4. Gross Risk Level

- The level of risk from a hazard when no control measures in place.

#### 5. Current Mitigating Action (Existing Control measures)

- Consider the physical geography e.g. upon arrival at destination are there pavements, barriers etc.; if residential, is there adequate security within the accommodation.
- Consider the management systems that are in place e.g. Ratio of staff to pupils, First Aid training etc.

#### 6. Net Risk Level

- The residual level of risk from a hazard with the Mitigating Actions (Existing Control Measures in place.)

#### 7. What actions can be taken to further reduce the risk?

- Can the risk be removed completely?
- Is there a less risky option?
- Can access to the hazard be prevented?
- Can arrangements be made to reduce exposure to the hazard?
- Can particular clothing or equipment be provided?
- Do specific warnings need to be included in meetings for pupils / parents?

## EDUCATIONAL VISIT APPROVAL FORM

**Form 'C'**  
(Page 1 of 3)

**School:**

**EVC:**

**Party Leader:**

**Date and Times of Visit:**

**Destination /Itinerary / Purpose**

**Insurance Arrangements (Tick box)**

<b>Number of Pupils in Group</b>	Male	Female	AGE RANGE

**Is a list of Pupils enclosed (\*)**

(\*) Only required for trips involving absence from home. If NO, list is to be retained at school

Names of Teachers / Adults	Position i.e. Leader, Supervisor	First Aid Qualified?	Approved Minibus Driver?	Other relevant Qualifications and Experience		

**Risk Assessment**

**Form 'C'**  
(Page 2 of 3)

Have Risk Assessments been made, recorded and communicated for this Off-Site Visit?	YES	NO
Has a copy of the Risk Assessment(s) sent to the LA with this Approval Form? (Category B and C off-visits only)	YES	NO
Has any of the Staff made a preliminary visit to the proposed venue in the last 6 months?	YES	NO
If not have other efforts been made to source information about the venue?	Details	

**First Aid Provision**

Details of First Aid Provision	
--------------------------------	--

**Transport**

Mode of Transport proposed	Name of Contractor, if appropriate

**Travel Information for Overnight and Visits Abroad (Category B & C)**

	Departure	Return
Date		
Time		
Port /Airport		
Ferry / Airline Company		
Booking No. / Flight No.		

## Emergency Contacts

**Form 'C'**  
(Page 3 of 3)

For visits within normal school hours it will be assumed that the school will be the nominated Emergency Contact. If there is a possibility that a visit may overrun the school day, Emergency Contact must be arranged. The level and duration of the visit or activity will dictate whether all or some of the following is required.

<b>Name</b>		<b>Name</b>	
<b>Tel No. Day</b>		<b>Tel No. Day</b>	
<b>Tel No. Evening</b>		<b>Tel No. Evening</b>	
<b>Mobile</b>		<b>Mobile</b>	

<b>Name</b>		<b>Name</b>	
<b>Tel No. Day</b>		<b>Tel No. Day</b>	
<b>Tel No. Evening</b>		<b>Tel No. Evening</b>	
<b>Mobile</b>		<b>Mobile</b>	

***Emergency contacts must be fully aware of their obligations and be available with the necessary paperwork at all or stated times. All contacts must be conversant with the Emergency Procedures as required in the Authority's Off-Site Policy and Guidance. Visits abroad and residential visits in the UK over 36 hours in duration should have at least 4 Emergency Contacts.***

## Approval

	<b>Category A</b>	<b>Category B1</b>	<b>Category B2&amp;3</b>	<b>Category C(all)</b>
<b>Head Teacher</b>				
<b>Chair of Governors</b>				
<b>Local Authority Signatory (on behalf of Director of Education and Children's Services)</b>				
<b>Date</b>				

<b>LA comments</b>	
--------------------	--

***Please Note:***

***A detailed list of ALL participants, addresses and contact numbers will need to be lodged at school for all Category B & C visits before the visit is due to take place.***

**Form 'D'**

**Educational Visits: Staff Competence Sheet**

Name.....

**1. Current Qualifications and Training Courses attended**

(All local, National and training courses deemed appropriate and relevant to Off-Site Visits)

<u>Qualification</u>	<u>Awarding Body</u>	<u>Date of Training</u>	<u>Date of Assessment</u>
<b>First Aid</b>			

**2. Experience that may be relevant**


**3. Agreed competences**

<b>Cat.</b>	<b>Activity</b>	<b>Supervisor</b>	<b>Team Leader</b>
<b>A</b>			
<b>B1</b>			
<b>B2</b>			
<b>C1</b>			

**EVC Approval**

<b>Name:</b>		<b>Signed</b>		<b>Date:</b>	
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<b>Cat</b>	<b>Level of Activity</b>	<b>Supervisor</b>	<b>Provider</b>
<b>B3</b>			
<b>C2</b>			
<b>C3</b>			

**LA Officer Approval**

<b>Name:</b>		<b>Signed</b>		<b>Date</b>	
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Form 'E'

## POST EDUCATIONAL VISIT EVALUATION

Please fill in as much detail as possible in order to help with the planning of similar Educational visits in the future.

Destination / activity / date(s):

Team Leader:

Adult: Pupils ratio on visit:

<i>Please comment on the following features, paying particular attention to Health and Safety issues:</i>	
Departure from school	
Transport / Travel	
Location	
Activities	
Educational Content	
Behaviour	
Arrival back at school	
Any close calls / Near misses	
<i>In addition, for Residential Visits</i>	
Quality of Instruction	
Quality of Equipment	
Accommodation	
Food	
Evening Activities	
Links with Travel Company/ Representatives	

Please return this form (with any additional supporting evidence) to Head Teacher / Educational Visits Co-ordinator within 10 working days after return from visit.

## **APPENDIX A**

### **HEAD TEACHER'S RESPONSIBILITIES**

The Head Teacher should ensure that:

- Adequate child protection procedures are in place
- All necessary actions have been completed before the visit begins
- A suitable risk assessment has been completed and appropriate safety measures and emergency procedures are in place
- Training needs have been assessed by a competent person and the needs of the staff and students have been considered
- The group leader has experience in supervising the age groups going on the visit and will organise the group effectively
- The group leader or another teacher / instructor is suitably competent to instruct the activity and is familiar with the location / centre where the activity will take place.
- Group leaders are allowed sufficient time to organise visits properly
- Non-teacher supervisors on the visit are appropriate people to supervise children
- Ratio of supervisors to students is appropriate
- The LA and governing body has approved the visit, if appropriate
- Parents have signed consent forms
- Arrangements have been made for the medical needs and special educational needs of all the students
- Adequate first-aid provision will be available
- The mode of transport is appropriate
- Travel times out and back are known, including pick-up and drop-off points
- There is adequate insurance cover
- The school has: the address and telephone number of the visit's venue; a contact name; details of companies providing transport, including flight numbers
- A school contact has been nominated and the group leader has details
- The group leader, supervisors and nominated school contact have a copy of the emergency procedures
- The group leader, supervisors and nominated school contact have the names of all the adults and students travelling in the group and the contact details of parents and the teachers' and other supervisors' next of kin
- There is a contingency plan for any delays including a late return home
- The financial and cash handling aspects of the trip meet the requirements of the Governors Policy for Purchasing and Financial Management and the DfES policy for Charging and Remissions.

## **APPENDIX B**

### **TEAM LEADER'S RESPONSIBILITIES**

The team leader must:

- Obtain the Head Teacher's prior consent
- Follow LA and Governing Body policies
- Appoint a deputy
- Clearly define each group supervisor's role and ensure all tasks have been assigned
- Be able to control and lead students of the relevant age range
- Where tuition is given by school staff, be suitably competent to instruct students in an activity
- Where tuition is given by external provider, ensure that their competency has been demonstrated
- Wherever possible, be familiar with the location / centre where the activity will take place\*
- Be aware of child protection issues
- Ensure that adequate First-Aid provision will be available
- Undertake and complete the planning and preparation of the visit including the briefing of group members and parents
- Undertake and complete a comprehensive risk assessment
- Review regularly undertaken visits / activities and advise the Head Teacher where adjustments may be necessary
- Ensure that teachers and other supervisors are fully aware of what the proposed visit involves
- Have enough information on the students to assess their suitability or be satisfied that their suitability has been assessed and confirmed
- Ensure the ratio of supervisors to students is appropriate for the needs of the group
- Consider stopping the visit if the risk to the health or safety of the students is unacceptable and have in place procedures for such an eventuality
- Ensure that the group supervisors have details of the school contact
- Ensure that group supervisors and the school contact have a copy of the emergency procedures
- Ensure that the group's supervisors have the details of student's special educational or medical needs which will be necessary for them to carry out their tasks effectively
- Observe the guidance set out for teachers and other adults in the main policy

**(\*) If, despite sufficient warning, the Team Leader cannot arrange a pre-visit, evidence of risk assessment must be sought from the centre to be visited. Where the location / accommodation is re-arranged with insufficient warning, the Team Leader must complete a risk assessment at the earliest opportunity and take the decision to continue or abandon the visit.**



**APPENDIX C: Example of Educational Visit Risk Assessment**

<b>Visit Description</b>	<b>Scuba Diving</b>	<b>Team Leader</b>	John Smith			<b>Year Group</b>	7 - 9
<b>Date of Visit</b>	8 <sup>th</sup> – 12 <sup>th</sup> October 2002	<b>Male Staff</b>	2	<b>Female Staff</b>	1	<b>Number of students</b>	19

Hazard	Persons at Risk	Risk Description	Gross / Initial risk		Risk Level	Current Mitigating Action (Existing Controls /Precautions)	Net risk		Risk Level	Owner
			Likelihood	Impact/Severity			Likelihood	Impact/Severity		
Coach Accident	All	Range of potential injuries from minor cuts to death.	M	H	AMBER	Using Licensed Contractor and following LA Code of Practice for travelling by Coach	L	M	GREEN	Head Teacher / EVC
Loss of students during rest stops	Pupils	<ul style="list-style-type: none"> <li>- Pupils left without supervision</li> <li>- Potential for injury in traffic accident.</li> <li>- Potential abduction</li> </ul>	M	M	AMBER	Management procedure requiring a register of pupils and headcounts before departing stop. Ensure Mobile Phone communication between multiple coaches	L	L	GREEN	Team Leader
Disembarkation on major road	All	Range of potential injuries from minor cuts to death.	M	H	AMBER	Ensure that participants disembark away from passing traffic Warn pupils of the dangers Pupil Code of Conduct.	L	M	GREEN	Team Leader
Scuba diving	All	Range of injury potential from minor to death	M	H	AMBER	Under Instructor or Dive Master at all times. Signed liability forms	L	M	GREEN	Team Leader / Instructor
Carriage of scuba equipment	All	Cuts, bruising and potentially fractures if equipment dropped on limbs etc.	M	H	AMBER	Training is provided in care and use of equipment	L	M	GREEN	Team Leader / Instructor
<b>Assessed by (Print)</b>		John Smith	<b>Signed</b>		<i>J. Smith</i>	<b>Date assessed</b>		7 <sup>th</sup> July 2002		
<b>Approved by EVC (Print)</b>		Mel Jones	<b>Signed</b>		<i>M. R. Jones</i>	<b>Date</b>		21 <sup>st</sup> July 2002		

## **Appendix D**

### **Grades of Adventure Activities, as defined by DfES**

In order to discharge their responsibility for the safe supervision of adventure activities, Local Authority's (L.A's) should determine which activities entail a level of risk sufficient to bring additional procedures into play beyond those applied to off-site visits generally.

These additional procedures may involve training, induction and formal assessment of leader competence, and obtaining and heeding expert technical advice.

A broad range of activities could be considered "adventurous". The categorisation here is intended to assist L.A's, Head Teachers and EVC's to determine an appropriate course of action in respect of activities presenting different levels of potential risk.

#### **Grade 'A' Adventure Activities**

Activities that present no special risks and can be supervised by a teacher (who has been judged competent to lead educational visits, generally) are considered to be Grade 'A'. In accordance with good practice, these activities are conducted following the LA's or school's standard visits procedures.

*Examples might include:*

*Walking in parks or on non-remote country paths*

*Field studies in environments presenting no particular hazards*

#### **Grade 'B' Adventure Activities**

Activities where safe supervision requires that the leader should, as a minimum, have undergone an additional familiarisation or induction and been approved as appropriately competent by the L.A. A National Governing Body (NGB) award such as the Basic Leadership Award (BELA) may also be relevant as a measure of competence for teachers supervising Grade 'B' activities.

*Examples of activities might include:*

*Walking in "open country"*

*Camping in summer*

*Cycling on roads or non-remote off-road terrain*

*Climbing on indoor climbing walls*

*Low level initiative challenges*

#### **Grade 'C' Adventure Activities**

Activities for which safe supervision requires that the leader should normally have undergone a recognised course of training, have gained relevant experience and have been judged competent, either by the appropriate National Governing Body (NGB) or by a person acting on behalf of the LA as a technical advisor for the activity. The process of training, accumulation of experience and assessment may lead to the award of a recognised NGB qualification. Alternatively, it may lead to a local or site specific validation.

Activities in Grade 'C' include all those within the activities scope of the Adventure Activities Licensing Regulations 1996, as well as other activities for which this rigour of assessment of leader competence is appropriate.

*Examples of the latter might include:*

*Remote hill or moorland walking*

*Camping in winter*

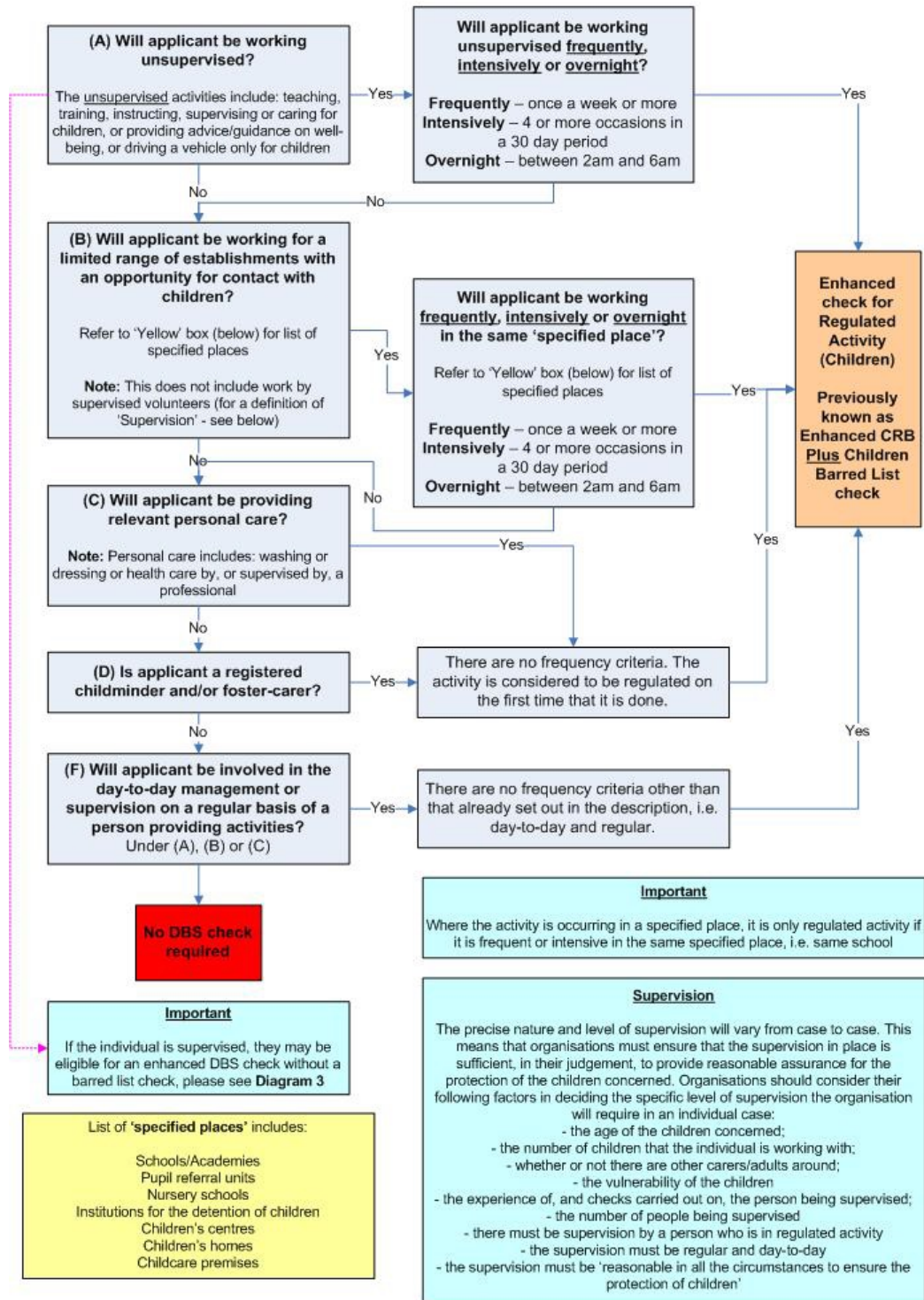
*Swimming in the sea or open water*

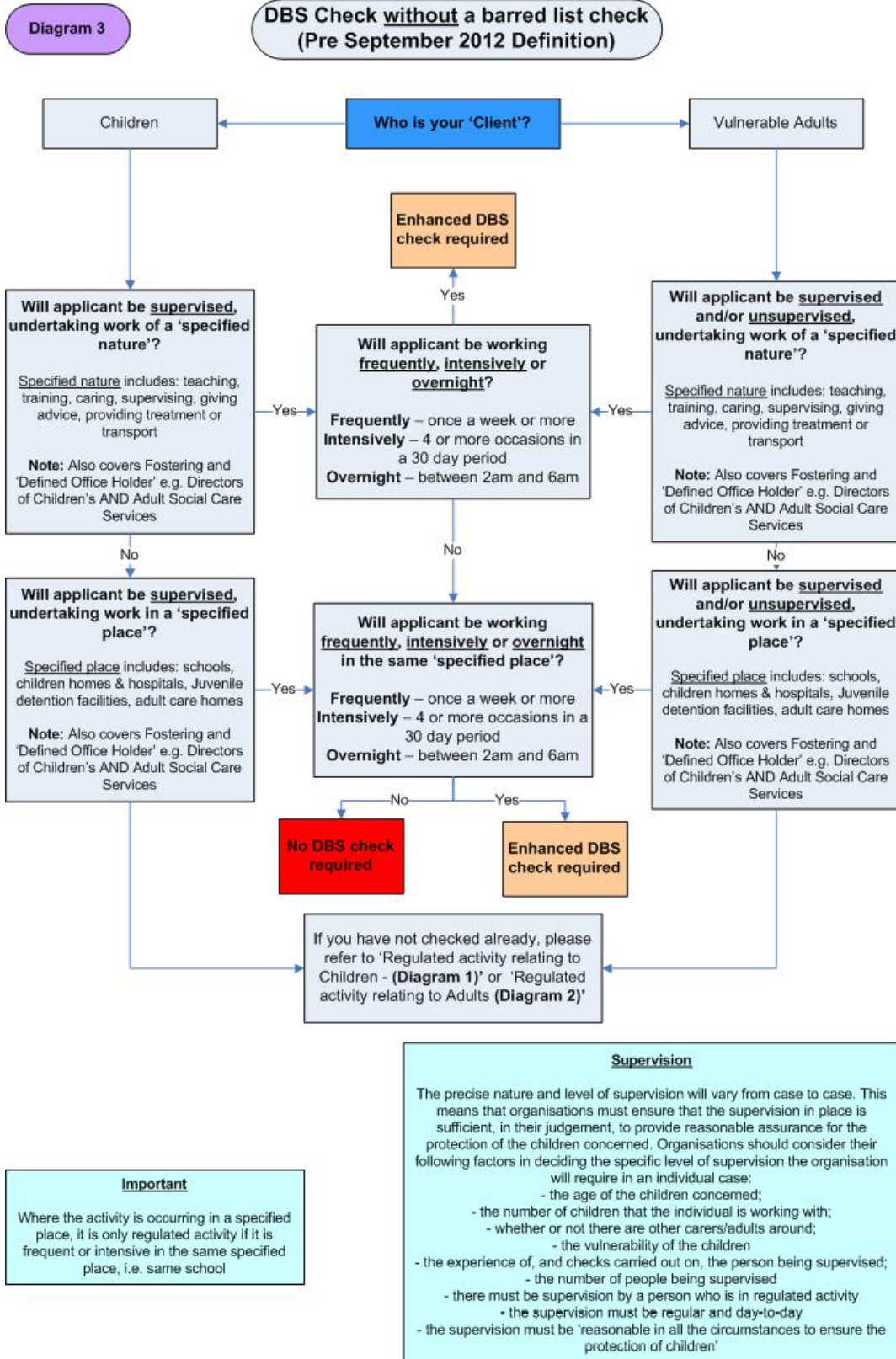
*Climbing / Abseiling outdoors*

## Appendix E Disclosure and Barring Service Checks

Diagram 1

### Regulated activity relating to Children (Post September 2012 Definition)





## APPENDIX F :Emergency procedures action plan

**Type of Incident TRAFFIC INJURY NON INJURY SLIP/TRIP/FALL OTHER.....**

<b>Action Plan</b>	<b>Incident details matrix</b>
1. Remember to look after yourself	Your name and contact number      Location      Name of group and leader
2. Maintain effective engagement with group	.....
3. Establish nature of incident	.....
4. Any casualties? YES	Number of students in group      Name of any members sent for assistance
a) Implement first aid	.....
b) Emergency services	.....
c) Referral to medical support	.....
5. No casualties	Names and ages of injured      Names of witnesses
a) Incident dealt with locally	.....
b) Emergency services	.....
Name and contact details for staff accompanying casualties or witnesses	Brief description of incident
.....	.....
.....	.....
.....	Proposed course of action
6. Inform establishment emergency contact	.....