

Organising Visits & Journeys

Educational Visits & Outdoor Education Guidelines



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Foreword

It is recognised by those in education, including the Department for Education, that many of the most rewarding activities take place outside the classroom. These activities may vary from excursions by very young children to shops or parks near their settings, to challenging, adventurous activities for older pupils and young people.

Some of these activities will be directly related to the requirements of the National Curriculum or specific to examination courses, but most will be intended to broaden the range of opportunities of personal achievement available to young people. They will enhance their self-confidence and personal development and will improve their ability to form social relationships with their peers and with adults.

In planning such activities, the educational nature should be borne firmly in mind, and teachers and other leaders should be careful to define the educational objectives. These may well include the acquisition of information, the experience of processes that will enable children and young people to enhance their understanding of concepts of varying complexity and, in some cases, the development or re-tuning of physical skills.

The importance of out of school and off-site activities for the social development of children cannot be over-emphasised, and this should be taken into account when setting the objectives for an excursion.

It should be remembered that the setting of objectives is only a prelude to the detailed planning of the activity and that the detailed plans, whatever form they may take, should include provision for social development and interaction as well as for the intellectual and/or physical activities which will normally form the content of the activity.

MEL JOHN-ROSS
Executive Director
Children's Services

Overview

STANDARDS FOR EDUCATIONAL VISITS

This guidance document should be read alongside the associated BMBC document called **Safety and Risk Management Standards for Educational Visits** which is available via the BMBC Evolve online educational visits system. Both are made under the BMBC **Corporate Health and Safety Policy** which is available via the council's intranet.

The purpose of this guidance is to help make the planning and preparation for visits and journeys easier to undertake. The latest version of this document is available on the Evolve online visits system after log in at:

www.barnsleyvisits.net

The BMBC Evolve visits system can be accessed by visiting the web address above or clicking the Evolve icon shown on the right and throughout this document.



The online version of this guidance will be updated and amended as necessary and represents the definitive reference document.

Maintained schools and other establishments where BMBC is the employer must be familiar with and comply with this guidance.

Academy schools and establishments supported by BMBC where BMBC is not the employer are advised to adopt and comply with this guidance.

The effective implementation of this guidance requires the commitment and co-operation of head teachers, managers and staff of schools and other establishments which conduct off-site educational visits.

Schools and other establishments should ensure that they are familiar with this guidance and make it accessible to their staff, and that the guidance and any amendments are communicated effectively to their staff.

Additional information relating to educational visits and outdoor activities is provided regularly to supported schools and other children's services via email, circular letters, the weekly e-bulletin and the online Educational Visits News site which is accessible at www.edvisits.wordpress.com.

Abbreviations used throughout this document include:

BMBC	Barnsley Metropolitan Borough Council
LA	Local Authority
OEA	Outdoor Education Adviser
DfE	Department for Education

Terminology

This guidance applies to all educational settings. Therefore, as schools form the largest part of this provision, it is based upon the language and terminology used in schools.

Clearly, where terms such as pupil, teacher or school are used they apply equally, according to context, to other educational settings, such as the integrated youth support service, early years settings and residential care settings. Terms such as manager, staff member, worker, child or young person should therefore be substituted as appropriate to the situation.

Managers and staff in all settings should be able to interpret accordingly this guidance to meet the needs of their own context.

National Guidance

BMBC guidance is consistent with national advice and guidance available from the [Department for Education](#) the [Outdoor Education Advisers' Panel](#) and the [Health and Safety Executive](#) and known good practice in relation to educational visits and outdoor activities which has become established over time. Other organisations which provide guidance relating to off-site educational visits and activities include the [Royal Society for the Prevention of Accidents](#) (ROSPA) and the [Association for Physical Education](#) (AfPE). BMBC guidance contains detailed information on local procedures, systems and processes which are relevant to schools and establishments supported by BMBC.

National Guidance for the management of educational visits is provided by the Outdoor Education Advisers' Panel, it is available at www.oeapng.info.

This is the principle source of national underpinning guidance setting out current good practice in the field of educational visits.

National Guidance can be accessed by visiting the web address above or clicking the National Guidance icon shown on the right and throughout this document. To find the information you need from the National Guidance website home page, use the Contents menu or use the Custom Search function. The menu item called First Visit sets out how to navigate the site to find the information you need.



If there is perceived to be any difference between BMBC guidance and any other guidance, BMBC guidance must be followed and schools and other establishments should inform the outdoor education adviser to request advice and clarification.

Head teachers, managers, governors, teachers, volunteers, other supervisors, the LA and other education employers have a responsibility for ensuring that whenever children are taken off-site on educational visits suitable attention is paid to their safety through appropriate leadership, adequate staffing ratios and the use of suitable safe methods and practices.

It is essential that sufficient planning and preparation is made before any visit. Anyone involved in planning, organising and supervising any off-site visit must take all reasonable steps to ensure the safety of pupils, themselves and their colleagues.

Educational Visits Policy

Each school or other establishment must have a policy for educational visits and journeys which is approved by the governing body.

All activities taking place off-site are included within the scope of this guidance.

Children and young people may be involved in a wide range of activities, usually referred to as “trips”, “journeys” or “visits”. These can cover anything from visits to the local library, museum or swimming baths and away sporting fixtures to extended adventurous visits to remote locations overseas.

Important notes

1. When consulting sources of written guidance or regulations which apply to educational visits and activities it is essential to have ready access to specialist advice with the up-to-date knowledge and competence necessary to interpret and apply effectively such guidelines and regulations. For schools and other establishments supported by BMBC contact the BMBC Outdoor Education Adviser.

2. Where there is any difference between any other guidance and these BMBC standards and guidance, BMBC guidance must be followed by schools and other establishments where BMBC is the employer. Schools and establishments supported by BMBC where BMBC is not the employer are advised to follow BMBC standards and guidance.

Enquiries on all aspects of educational visits, journeys and outdoor education should be made to:

DAVID ARMSTRONG

Outdoor Education Adviser
Children's Services
Corporate Mailroom
PO Box 634
Barnsley
S70 9GG

t: 01226 773586

m: 07824 351133

e: davidarmstrong@barnsley.gov.uk

Section 1

Health and Safety Legislation

Under the Health and Safety at Work Act 1974, employers are responsible for the health, safety and welfare at work of their employees. Employers are also under a duty to ensure as far as is reasonably practicable, the health and safety of anyone who may be affected by their activities. This includes participants in all educational visits and journeys away from the school site approved by the manager, head teacher and/or governing body.

The Health and Safety at Work Act 1974 requires employers to ensure, so far as is reasonably practicable:

- The health, safety and welfare of their employees (teachers and other staff);
- The health and safety of others who may be affected by their undertaking (pupils, children, young people, members of the public);

The Act also requires employers to provide up to date policy and an organisational structure and arrangements to implement the policy effectively (e.g. information, instruction, training, supervision, monitoring systems, competent advice and guidance).

The Management of Health and Safety at Work Regulations 1999, made under the 1974 Act, also requires employers, amongst other duties, to:

- assess the risks of activities;
- introduce measures to control those risks;
- tell their employees about these measures;
- ensure access to competent specialist health and safety assistance.

Also under Health and Safety legislation employees must:

- take reasonable care of their own and others health and safety;
- cooperate with their employers over safety matters;
- carry out activities in accordance with training and instruction;
- inform the employer of any serious risks.

STANDARDS FOR EDUCATIONAL VISITS

You should ensure you are familiar with the BMBC document called **Safety and Risk Management Standards for Educational Visits** which is available via the BMBC Evolve online educational visits system.

Section 2

Roles and Responsibilities

STANDARDS FOR EDUCATIONAL VISITS

More detailed information about organisational structures and who does what is provided in the associated BMBC document called **Safety and Risk Management Standards for Educational Visits** which is available via the BMBC Evolve online educational visits system and which should be consulted alongside this guidance document. Additional information on each role is provided below.

BMBC Support for Educational Visits

The BMBC team responsible for overseeing educational visits and activities includes the Outdoor Education Adviser (OEA), who works closely with the Corporate Health, Safety and Emergency Resilience Unit, the Insurance Section, the Risk Management Section, the Education Service and BMBC officers in other sections and directorates in carrying out this role.

Executive Director, Children's Services

The Executive Director, Children's Services, carries ultimate strategic responsibility for health and safety of pupils and young people taking part in educational visits from schools and other establishments where BMBC is the employer.

Outdoor Education Adviser

The Outdoor Education Adviser provides specialist competent advice and guidance to schools and other establishments on all matters related to educational visits and activities on behalf of the Executive Director, Children's Services.

Health, Safety and Emergency Resilience Unit

The Corporate Health, Safety and Emergency Resilience Unit provides advice and support to the outdoor education adviser and executive director when necessary.

School Governing Body

The School Governing Body provides strategic leadership to schools. It should decide which visits it needs to be informed about in advance and should monitor the effectiveness of educational management systems and procedures.

Head Teachers and Managers

Head Teachers and Managers are responsible for the management and conduct of educational visits and activities for their establishment. They should provide scrutiny and authorisation for all visits which take place.

Educational Visits Co-ordinator (EVC)

All educational establishments are expected to have appointed an Educational Visits Co-ordinator (EVC) who will help the school or establishment fulfil its health and safety obligations for educational visits and journeys.

All EVCs in schools and other children's services settings supported by BMBC are expected to attend a BMBC EVC Training course and to keep up to date with developments and good practice in the field of educational visits and outdoor activities. Courses are advertised to schools by email, circular letter, e-bulletin, the Evolve system and in the online Educational Visits News site.

Each school or other establishment should have a designated EVC. This may be the head teacher or senior manager. It could also be a teacher or other member of staff, in which case the EVC will be appointed by and act on behalf of the head teacher or manager.

The formal recognition of the EVC function will help the school fulfil its health and safety obligations for visits. The EVC will be involved in the planning and management of educational visits including adventure activities led by school staff.

The EVC's competence will relate to the size of the school and the types of educational visits proposed. For example, the needs of a small primary school will differ from those of a large secondary school with an active Duke of Edinburgh's Award programme.

Visit Leader

The visit leader should have been appointed or approved by the Head teacher or the governing body.

The competence of the visit leader must be assessed as adequate by the EVC and head teacher to match the nature of the visit. As a minimum, head teachers must ensure that visit leaders have the necessary competencies to ensure the safe management of the visit and that they are able to deliver the educational objectives of the visit.

Any decision by head teachers or managers and the governing body to assign visit leadership supervision to non-teaching staff should be very carefully considered on the basis of their individual abilities, training and competencies rather than cost to the school budget.

The following are some of the criteria that should be considered when determining the suitability of a visit or activity leader:

- Relevant specific experience
- Qualifications
- Familiarity with the venue
- Relationship with the participants
- Working relationship with other staff on visit
- Staff numbers and ratio to participants
- Time available for any necessary preparation
- Contractual or job description implications
- Their willingness to undertake the role

- Their personal/family circumstances, particularly for overnight stays
- Any requirements of the organisation/location to be visited
- Their understanding of the educational objectives of the visit

The visit leader's role must be clearly defined and understood by all adults and young people involved.

If the head teacher accompanies the party, but is not the visit leader, this must be made clear to all concerned. There should be no confusion or ambiguity about who is in charge. Similarly, responsibility should be made clear when a leader becomes ill or is otherwise separated from the party, or when the party is split into smaller groups.

Other Visit Staff

Other visit staff need to ensure that they understand their roles for the visit and are competent to carry them out. They must act to support the visit leader and must be clear about the educational objectives and safety arrangements for the visit.

Adult Volunteers

Many schools and settings take parents and other non-teacher adults on visits and journeys. Such adults also owe a duty of care to the children in their charge i.e. they must act as a reasonable parent would in the circumstances.

Their role must be clearly defined. Parent helpers, for example, may have significantly different experience to teachers and other school staff. They may not be familiar with supervising large numbers of children or young people. Therefore, school staff retain primary responsibility for supervising the party at all times.

Adult volunteers should not be left in sole charge of children or young people if they have not been subject to suitable child protection checks and are judged to be competent to undertake such a role.

External Agencies or Activity Providers

External activity providers are often engaged to provide specialist leadership and supervision for a range of activities and environments. Some, but not all, adventurous activities are covered by the licensing scheme covered by the Adventure Activities Licensing Regulations 2004 (and any subsequent amendments).

Any provider that holds a current licence for such activities has been assessed as being competent to provide them by a government appointed agency - the Adventure Activities Licensing Authority (AALA).

Any external provider of an AALA licensable activity required to hold a license that does not hold a current licence must not be used.

For non-licensed activities, the school or establishment must undertake reasonable enquiries to ensure the provider is competent to provide the activities required - this will include transport providers, sports centres and swimming pools, farm visits and others.

A number of voluntary accreditation schemes are currently in existence which provide a measure of the quality and safety a provider's services e.g. Learning

Outside the Classroom (LOtC) Quality Badge, Adventuremark, British Activity Providers Association (BAPA) accreditation. More details about such schemes are available from the BMBC Outdoor Education Adviser.



Pupils and Young People

Pupils and young people have a responsibility to behave sensibly during visits and activities and to follow the directions and instructions of supervising staff. Those whose behaviour is considered a danger to themselves or other members of the group may be prevented from going on a visit or, whilst on a visit, participating in activities if reasonable adjustments cannot be made to accommodate their behaviour.

Parents and Guardians

Parents and other legal carers should be able to make an informed decision about whether their child should go on the visit, and what the expectations will be of them and their child.

In order to do this the school or establishment must ensure that parents are given sufficient information in writing and are invited to relevant briefing sessions and that informed consent from parents is given prior to children and young people taking part in visits and activities.

Special arrangements may be necessary for parents for whom English is a second language.

Section 3

Planning and Preparation of Visits

Planning Principles

Thorough planning and preparation are essential for the safety, well-being and enjoyment of all participants for all visits and journeys. It is necessary irrespective of whether the visit is to a local park, museum or swimming pool or includes a residential stay in the UK or abroad.

Effective planning does not have to be complicated.

A Quick Reference Guide is available in the annexes, which can act as a starting point when planning a visit.

The table below also gives a breakdown of the stages of organising a visit.

The type of visit will determine how much emphasis, time and effort are required at each stage.

Planning Stages

Order	Process	People Involved
1	Identify visit purpose and target group	Party Leader, other staff, pupils
2	Obtain initial approval	Party Leader, EVC, Head teacher
3	Consult planning checklists	Party Leader, EVC
4	Determine dates, venues and costs	Party Leader, EVC, external providers, other staff, pupils, parents
5	Liaise with EVC on planning and approval process	Party Leader, EVC
6	Select other competent staff and volunteers	Party Leader, EVC, Head teacher
7	Assess any significant risks and record	Party Leader, EVC, other staff, pupils
8	Organise key elements such as transport, accommodation, food, equipment, insurance	Party Leader, EVC
9	Complete visit planning checklist	Party Leader, EVC
10	Submit for formal approval	Party Leader, EVC, Head teacher, Governors, LA
11	Send letters to parents, collect consent forms	Party Leader, other staff
12	Hold parents meetings	Party Leader, other staff, volunteers, parents, pupils
13	Finalise arrangements	Party Leader, EVC, external providers.
14	Running the visit	Party Leader, EVC, external providers, other staff, volunteers, pupils, parents
15	Return from visit	Party Leader, other staff, volunteers, parents, pupils
16	Complete any necessary documentation	Party Leader, EVC, other staff, volunteers, pupils
17	Review visit	Party Leader, EVC, other

		staff, volunteers, pupils
18	Records retention and record keeping	Party Leader, EVC, Head teacher

Preparation and planning must take place as early as possible in the process to ensure sufficient time is available to consider all aspects of the visit and to enable sufficient time for visits to be approved by head teachers, managers, governors, the LA or other education employer.

The exact order in which the visit is planned will overlap and alter to some degree depending on its nature. Information is given below for each stage.

1. Identify Visit Purpose and Target Group

Throughout the year schools and others organise many routine visits and journeys as part of on-going learning experiences. These activities are usually regular events and involve particular classes or groups. Planning for these visits and journeys can be undertaken by reviewing, and if necessary revising, the planning and organisation which took place on the previous occasion.

When an entirely new visit or activity is proposed its suitability for a particular group is central its selection and planning.

The elements that need to be considered include educational objectives, previous staff experience, time available, visit costs, age and ability of participants.

Increased pupil and young person information sharing during the planning process promotes an understanding of the purpose of the visit, increasing their understanding of their responsibilities and decreasing the likelihood of inappropriate conduct.

2. Obtain Initial Approval

Proposals for any visits or journeys should initially be discussed with the head teacher and/or the Educational Visits Co-ordinator (EVC). At this stage it is important that the head teacher and/or the EVC are satisfied that the party leader has sufficient experience and is competent to undertake the type of visit proposed.

3. Consult Planning Checklists

It is important that planning is conducted in a structured way to be truly effective. To help with that process planning checklists are provided.

The main visit planning checklist is also available via the home page of the Evolve online visits system after log in.

They should be regarded as support mechanisms to help planning ensuring that all the relevant areas are covered.

If it is a repeat or straightforward visit checklists will take very little time to complete and confirm the effectiveness of the planning to all staff and those giving the necessary approval.

4. Determine Dates, Venue and Costs

School and other establishments' timetables and budgets are carefully planned. Finding the most appropriate times and sources of funding are often key to the success of a venture.

It may be possible to locate sources of external funding from trusts, charities, and government-funded projects, which can greatly increase the likelihood of a trip taking place.

Organising staff should be aware that visits are subject to the requirements of the law on charging for school activities. Schools should have a policy which sets out their charging and remissions policy for educational visits. Advice on Charging for School Activities is provided separately by the LA.

The availability of external providers of transport, accommodation and activity instruction may also be key factors in setting specific dates.

The distance that participants need or are prepared to travel for a specific location or resource may also influence the organisation of the visit.

5. Liaise with EVC on Planning and Approval Process

The involvement of the members of staff will vary according to the particular trip, however, it is important that staff are frequently kept up to date on the planning process and given delegated tasks where appropriate.

Visit approval forms for Category C visits (residential, overseas, or adventurous activities) should be submitted to the LA via the Evolve online visits system www.barnsleyvisits.net at least 4 term-time weeks prior to the visit (and much earlier for more complex visits).

Where, for operational reasons, some services may occasionally need to operate to shorter lead-in times, service managers must ensure robust systems are in place, in accordance with these guidelines, to secure suitable planning, risk assessment and scrutiny prior to visit approval.

This gives enough time for staff to follow up any missing information or to make any necessary amendments to the visit before it takes place.

One of the main reasons for the LA requiring this information is so that it can be held centrally for use in support in the unlikely event of an emergency where the LA provides a 24-hour emergency response system.

6. Select Other Competent Staff and Volunteers

It is essential that other staff or volunteers who accompany the group are selected according to their competence in relation to any specific role they undertake. They must also fully understand what their roles and responsibilities involve.

National guidance indicates that staff other than qualified teachers may assume levels of responsibility commensurate with their competence and experience and subject to the judgement of the head teacher or senior manager.

7. Assess any Significant Risks and Record

Because of the particular importance of this aspect of planning, it is addressed in detail in a separate section in this guidance on risk assessment.

The key points of the risk assessment process are listed below:

- Risk assessment is a legal requirement.
- Only the significant findings of the risk assessment require recording.
- Relevant previously recorded risk assessments can be reviewed and adapted for re-use.
- Schools are responsible for assessing the risks associated with the areas for which they are directly responsible - external providers must have risk assessments for their responsibilities.
- Schools should understand that many hazards and risks will need ongoing attention during the visit or activity (dynamic assessment).
- Risk assessments should contain contingency measures - a Plan B - in the event of the original plan becoming unworkable.
- There is no substitute for prior knowledge of the venue - the most effective way of gathering this is through a preliminary visit.

8. Organise Key Elements such as Transport, Accommodation, Food, Equipment, Insurance

The key elements of a visit will clearly vary according to the nature of the trip, but some will be essential to all e.g. insurance.

Further details can be found in other relevant sections of this guidance.

Some areas, such as accommodation, food, and equipment needs, will be specific to the visit being planned and will rely on the experience of the staff and the EVC.

However, it is accepted good practice to gather useful information from as many sources as possible e.g. internet sites, tourist information offices, the venue's own information, previous group visits, and the outdoor education adviser.

Carefully collated information at this stage should save time and effort in the longer term.

9. Complete Visit Planning Checklist

The main visit planning checklist is available via the home page of the Evolve online visits system after log in. This will serve two purposes:

- to check that all the necessary elements have been organised or considered;
- to provide evidence of visit organisation to whoever needs to give approval for the visit.

10. Submit for Formal Approval

The approval for the visit is the responsibility of:

- the head teacher/senior manager for Category A visits;

- the head teacher/senior manager for Category B visits;
- the head teacher/senior manager and the LA for Category C visits.

Approval should be sought as soon as possible after the issues on visit planning checklists have been addressed to give time for consideration, thus allowing for any necessary adjustments to be made. **Minimum 2 term-time weeks for Category B visits, 4 term-time weeks for Category C visits.** The main visit planning checklist is available via the home page of the Evolve online visits system after log in.

Where, for operational reasons, some services may occasionally need to operate to shorter lead-in times, service managers must ensure robust systems are in place, in accordance with these guidelines, to secure suitable planning, risk assessment and scrutiny prior to visit approval.

11. Send Letters to Parents, Collect Consent Forms

It is vital to ensure that parents or carers are fully informed of relevant details of all visits regardless of the level of perceived risk. With careful planning and when needed it is possible to obtain termly or annual consent for Category A visits such as curricular, or regular routine activities or sporting fixtures.

12. Hold Parents Meetings

Prior to undertaking residential visits, or when young people are to travel abroad or engage in adventure activities, parents should be encouraged to attend a briefing meeting where written details of the proposed visit should be provided. There should be alternative arrangements for parents who cannot attend or who have difficulty with communication in English.

Meetings should take place when parents have had sufficient time to consider information already provided to them and formulate questions they may have about the activity.

13. Finalise Arrangements

The preceding list of arrangements should have ensured that planning has been effective, but time should always be allocated to checking that the small but essential details have been dealt with e.g. finding out how to get into self-catering accommodation in the dark, late at night, is much quicker and easier in advance.

It is important to check carefully emergency contact personnel and their contact numbers.

For each type of visit or journey the party leader should carry a standard pack of materials and resources. It is the responsibility of the school or establishment to decide what the pack contains. However it may contain such items as first aid kit, mobile phone, contact details, spare clothing.

14. Running the Visit

On-going judgements need to be made by experienced and competent staff during the visit. Dynamic risk assessment (see elsewhere in this guidance for more information) forms an important part of this process.

Having the right staff supervising with the right experience in the right numbers is fundamental to the safe and successful conduct of the visit.

Quality time spent on visit planning is an important factor in ensuring the effective conduct of the visit. Here are some benefits:

- the more effective the planning the less likely that staff will make poor decisions;
- any activity risk assessments should contain details of a 'Plan B', (alternate activity) which will considerably reduce the anxiety about making decisions once the trip has started but needs modifying;
- once the planning procedures have been used successfully on one trip, then any repetition of that visit or a similar visit should be much less onerous based on a review of the material used previously.

15. Return From Visit

The arrangements for the return should be clear to pupils and young people, parents, staff and emergency contacts and should have been provisionally addressed during the planning process.

This may include the enforced early return of either the whole group or individuals due to inappropriate conduct or for other reasons.

If there turns out to be an unexpected delay to the party, there should be an acknowledged system for communicating any changes in timings or arrangements to all parents, as well as emergency contacts, both during and out of school or establishment hours.

There may be times when groups return safely but late at night/early morning, when it is good practice to check in with the base contact to alleviate any uncertainty about their well-being.

16. Complete Any Necessary Documentation

Most educational visits take place without incident, but in the event of injury to any participants, or loss or damage to property, there will be information required by various authorities or insurance companies as soon as possible. The EVC is central to co-ordinating this with visit leaders.

It can be a sensible precaution for the visit leader to have ready access to copies of accident and near-miss reporting forms, and have insurance contact details in case any claim needs to be made.

If an accident occurs whilst under the supervision of another organisation, then their accident reporting system should be followed, but a copy retained for school or

establishment records and the information forwarded to the LA's Health, Safety and Emergency Resilience Unit.

If the party is led by school staff, the standard accident reporting system should be followed in accordance with the LA's Health and Safety Standard for Accidents/Incidents (Adverse Events) using forms HS2(P) for pupils and HS2(E) for employees, which must be forwarded to the LA.

Information on accidents/incidents which require reporting under RIDDOR should be provided as soon as possible to the LA's Health, Safety and Emergency Resilience Unit (see the LA's Health and Safety Standard for Accidents/Incidents (Adverse Events)).

Accidents which occur at activity centres and are reportable under RIDDOR should be done through the activity centre's reporting procedures and information provided to the LA (see above).

Near-miss reporting systems are important in allowing EVCs to disseminate information to other staff who will be supervising other groups, and can be the key to preventing potential accidents in future.

A near-miss form for alerting the LA to possible hazards is available in the annexes to this document, and can be used as a template if suitable. Schools should consider any system applicable to their size and circumstance as long as it is effective and used when it needs to be.

It is likely that there will be financial details, receipts, return of petty-cash and other issues that will be required by the school to ensure accountability, which in turn ensures the protection of organising staff in the event of any audit.

17. Review Visit

This is probably the most overlooked element of organising an educational visit - understandably as staff and participants are often tired, eager to get back to families, excited, or a combination of these.

However, time spent by staff, and pupils where appropriate, examining the effectiveness, safety, value for money, and enjoyment levels of a trip, is likely to save time when it comes to planning subsequent visits. This is best done at the earliest opportunity following the visit.

It becomes increasingly difficult with time to accurately recall events and reactions that had a significant impact on the running of the visit, and this is particularly relevant when reviewing risk assessments.

Some commercial providers use a final reflection session or questionnaire because they understand the value of feedback to the success of their ventures. It may be possible to use this as the core of the school's review.

Some schools have a review form for completion by visit leaders, but various forums such as departmental, whole staff meetings, or specially convened sessions with participants, may be deemed to be suitable.

18. Records Retention and Record Keeping



After the visit has taken place it will be necessary to ensure that records are kept for future reference for a suitable period of time and as appropriate.

BMBC Records Retention protocols should be followed. They are based upon national records retention guidelines available from the Information and Records Management Society.

Section 4

Supervision

Although a major contribution to the smooth running of a visit is made by careful planning and preparation beforehand, effective supervision is essential during the visit.

The roles and responsibilities of all involved in the trip are covered in detail elsewhere in this document and in the associated document called Standards for Educational Visits. However as far as group supervision is concerned, the duty of supervising staff is to take all reasonable measures to ensure that every child or young person under their supervision is safe and protected from any unacceptable risks. This is known as the Duty of Care

Duty of Care

Although there may be some perceptions that staff organising trips place themselves in a vulnerable position, statistics indicate that serious accidents on educational visits are rare. Prosecutions due to the abilities of staff and procedures are also rare. However when accidents do occur they may have serious consequences.

The principle of *in loco parentis* may be familiar to staff employed within the teaching sector. Because of professional expertise in their child-centred profession, the law would see them as having a duty of care beyond that of the average parent or carer.

At a planning and approval level this also applies to governing bodies, head teachers, educational visits co-ordinators, and visit leaders, all of who form important parts of the chain of responsibility.

During the visit the duty of care rests primarily with the visit leader and other responsible adults.

Visit staff should be reassured that the law expects them to have taken *reasonable steps* to provide adequate planning and supervision. They cannot be held liable for the genuinely unforeseeable.

The duty of care can only be seen to have been breached when someone with supervisory responsibility for the party is proved to be negligent and it was that negligence that led to an otherwise avoidable accident.

Reasonable Steps

These steps will be determined by a number of factors such as staff experience, the nature of the trip, the abilities of the participants and the environment in which the visit occurs.

In essence reasonable steps are the levels of planning, supervision, assessment of staff competence and review of procedures necessary for the particular visit/activity.

Staff should be reassured that if policy and procedures based on this LA guidance and that issued through DfE and OEAP are adhered to it is anticipated that staff will be seen to have taken those reasonable steps.

The Visit Leader

Appointment of a visit leader and other supervision roles for any off-site visit must be based on the competence of that person to undertake those duties and their ability to deliver the educational objectives of the visit.

The visit leader has overall operational responsibility for the planning, organisation and conduct of the visit.

The roles and responsibilities of the visit leader and other accompanying staff are set out earlier in this document.

Staff to Pupil Ratios

Staff/pupil ratios for the supervision of pupils and young people on educational visits are not laid down in law, but must be set according to the needs of the group, the environment, activities and experience and numbers of staff taking part and any other influencing factors.

This responsibility lies with the visit leader in consultation with the EVC. **Appropriate supervision ratios for visits should arise from the risk assessment.** It is important to have a high enough number of competent adult supervisors to pupils to cope with any foreseeable circumstances during the visit.

Although it is difficult to give precise ratios, there are factors that must be taken into account when determining these ratios. These should include:

- gender, age and ability of group;
- pupils with special educational or medical needs;
- nature of activities;
- experience of adults in off-site supervision;
- duration and nature of the journey;
- type of any accommodation;
- competence of staff, both on general and specific duties;
- requirements of the organisation/location to be visited;
- competence and behaviour of pupils;
- first aid cover.

Visit leaders should assess the risks and consider an appropriate safe supervision level for their particular group. Risk assessment should indicate reasons for supervision arrangements and staff/pupil ratios.

National guidance for educational visits no longer identifies suggested numerical supervision ratios except where it states the requirements contained in the EYFS Statutory Framework. National Guidance (www.oeapng.info) states:

'Staffing ratios are a risk management issue, and should be determined through the process of risk assessment. It is not possible to set down definitive staff/participant ratios for a particular age group or activity. Some guidance documents do set out ratios, but these should be regarded as starting points for consideration rather than being definitive, as they may be appropriate only where the activity is relatively straightforward and the group has no special requirements.'

The Early Years Foundation Stage (EYFS) Statutory Framework (updated 3rd April 2017) no longer sets out different requirements for minimum ratios during outings from those required on site. As with other age groups, ratios during outings should be determined by risk assessment, which should be reviewed before each outing. The appropriate ratio on an outing is always likely to be higher than the legal minimum (for children aged three and over in early years settings either 1:8 or 1:13 and 1:30 in infant school reception classes in maintained schools). It is not unusual for a ratio of 1:1 to be necessary'. (4.3b www.oeapng.info July 2018)

Prior to this, the DfES publication HASPEV (1998) suggested the following starting points for consideration whilst also stating *'...without special safeguards or control measures, these ratios will **not** be adequate to meet the needs of most residential or more complex visits...'*:

School years 1 - 3, 1:6

School years 4 - 6, 1:10/15

School years 7 onwards, 1:15/20

Outdoor swimming or paddling - 1:10

Swimming pools - 1:12 in school years 4 to 6;
1:20 for school years 7 onwards;
higher ratio for school year 3 and below.

Residential visits - 1:10

Overseas visits - 1:10

Remember: Staffing ratios are a risk management issue, and should be determined through careful consideration and the process of risk assessment.

The staff/pupil ratio is a method to determine how many supervising adults should accompany a group of pupils on a visit or journey or participate in an activity.

Example of how the staff/pupil ratio operates.

Key stage 2 camping

ratio 1:10

group size 10 or fewer – staff 2

group size 10 to 20 – staff 2

group size 20 to 30 – staff 3

To determine an appropriate supervision ratio, the school must undertake a risk assessment and if necessary consult the outdoor education adviser.

Head teachers, EVCs and visit leaders should liaise with Inclusion Services for further advice on the inclusion of pupils with special needs.

A number of serious incidents associated with water environments have highlighted the need for extra vigilance where there are accessible bodies of water. This may mean modifying the ratios suggested above depending on the abilities and awareness of pupils and staff and the activities to be undertaken. Further detailed guidance can be found in the DfES publication “Group Safety at Water Margins”.

Groups of more than four children of nursery age must be accompanied by a minimum of two qualified adults.

When activities are undertaken in remote or difficult to access terrain it is recommended that the level of competent adult supervision is increased.

Adults Other than Teachers

There are many staff and volunteers who possess skills and experience which can enhance the educational and personal development available through off-site visits. However, the fact that they are an employee or are willing to take on the role is not sufficient rationale for their use as a supervisor.

The use of non-teaching staff or volunteers to supervise pupils on educational visits must be based on their competence and appropriateness of their inclusion. The decision to do so is that of the head teacher or manager in consultation with the EVC and governing body.

It may be feasible to use employees from all sectors and backgrounds, however it is important to consider whether their job descriptions and contracts of employment reflect the levels of responsibility they may assume during a visit. This is particularly true when taking sole responsibility for pupils.

When making the decision to use non-teaching staff the considerations listed below should apply.

- Relevant specific experience
- Qualifications
- Familiarity with the venue
- Relationship with the participants
- Working relationship with other staff on visit
- Staff numbers and ratio to participants
- Time available for any necessary preparation
- Contractual or job description implications
- Their willingness to undertake the role
- Their personal/family circumstances, particularly re overnight stays
- Any requirements of the organisation/location to be visited

- Their understanding of the objectives of the visit

Parents/volunteers are sometimes used in a supporting role to supplement the supervision ratio. They should be carefully selected and ideally well known to the pupil group.

Parents/volunteers must never be left in sole charge of pupils or young people without undergoing suitable child protection checks.

Child Protection

Staff employed by schools and educational establishments must have been checked through the Disclosure and Barring Service (DBS) as part of their employment process.

Educational Visits Co-ordinators and visit leaders should understand and follow the procedures for vetting contractors, volunteers and other people not on the school staff who wish to be supervisors or drivers for educational visits.

Consideration will need to be given as to whether volunteers, including parents, who accompany activities should have unsupervised access to children and whether this is appropriate. The LA's volunteers policy must be followed.

Checks should therefore be carried out on volunteers and staff employed by contractors who will be engaged in regulated activity having regular on-going contact with pupils and young people.

Schools and other establishments can put volunteers forward for suitable child protection checks via the LA's Human Resources team who manage the process.

This does not mean every volunteer who helps to supervise an educational visit will have to obtain a disclosure.

Taking account of the above information, parents of primary age children often accompany their children on school visits and journeys to supervise them. In such cases it must be clearly established:

- a) that the parent can only supervise their own child(ren);
- b) that whilst on the visit/activity the responsibility for decisions relating to the programme (and alternate activities) remains with the visit leader;
- c) parents understand their role and agree to it.

Parents who accompany a school party to supervise their own children on a one-off basis as part of a larger group may not need child protection checks.

However volunteers helping teachers to supervise a residential visit must be checked. This may also be the case with anyone who is likely to be in sole charge of pupils under 18.

First Aid Provision

The level of first aid training possessed by any accompanying leader should reflect the likelihood and nature of any potential incident the group would be exposed to during the planned visit. It should result from risk assessment and first aid needs assessment.

Further detailed guidance is available from the LA and in Schools' Health and Safety Standard for First Aid.

It does not need to be the visit leader who is the qualified first-aider. There may be an advantage in another accompanying adult dealing with a first aid incident as this leaves the visit leader free to manage the whole group.

Any first aid qualification gained should be provided by a competent training provider and should be appropriate to the activity, environment, needs and activities being undertaken.

Some examples are given below to illustrate the factors which influence first aid provision and competence required.

1. *Walking a class through local streets to visit a nearby art exhibition.*

This would be a relatively low risk activity not in a remote setting and thus doesn't present significantly greater problems to cope with than in school grounds.

However, risk assessment would identify road traffic as the most significant hazard. If anyone was involved in an accident with traffic, what could the accompanying member of staff reasonably be required to do?

- Ensure the immediate safety of the rest of the group and summon emergency assistance immediately. Provision of basic life support if necessary.
- This is one of the first premises of all emergency care teaching, and any directly administered, effective, first aid given is then a bonus.

Therefore, the reasonable expectation (regarding first aid) of staff in charge of visits similar in nature to this is:

- that they are aware of the authority's emergency procedures in the event of an accident;
- that they are capable of and have the means for summoning emergency assistance;
- provision of basic life support if necessary.

They should have an up to date working knowledge of first aid including basic life support, carry an appropriate first aid kit and know how to call the emergency services. The most effective way to ensure an up to date working knowledge of first aid is to attend first aid training and keep it up to date.

2. *Driving or accompanying a group in a minibus to a sports tournament.*

There are two main elements that should be considered when assessing risks for this visit: hazards inherent in travelling in motorised transport and the risk of injury from the sporting activity.

Any vehicle used for carrying employees or those for whom we have a duty of care should contain a comprehensive and regularly checked first aid kit. This is also true of public and commercial passenger transport.

School owned first aid kits could be supplemented to cater for possible sporting injuries.

Although there are factors like distance and location which add to the risk of driving the major risks have been taken once the vehicle leaves the school gate

First aid skills that can deal with sports injuries are again a bonus, as these injuries are unlikely to be life-threatening.

As a rough guide, the one-day Emergency First Aid at Work course, may be appropriate for minibuss drivers.

Sports events should have their own first aid provision, based on risk assessment.

3. Instructing/leading a two-day canoe trip on the Leeds-Liverpool canal.

The issue may be more clear-cut where adventurous activities are concerned.

The staff leading such a trip as this would need to hold specific instructional qualifications.

These qualifications are only deemed valid if the holder has a current first aid certificate appropriate to the nature of the activity.

The staff will need to be able to deal with potentially life threatening situations where outside help may be very delayed.

A possible grey area surrounds visits to sites such as farms, industrial buildings and field trips to quarries.

Public sites and companies must comply with health and safety legislation and have designated first aid provision. The level of first-aid cover at a venue will inform the school's decision on the level of first aid expertise to be provided by the adults accompanying the group.

However, there are other sites where coping with school groups is not an everyday occurrence. The first aid cover would come under the duty of care of the school staff and their competence would need to reflect this.

There is a strong case for staff leading trips to more remote sites, and/or with different hazards to obtain a first aid qualification for remote places or wilderness areas, which is directly relevant to their circumstances. These are widely available from commercial providers.

As a matter of good practice, the provision of an elementary recognised emergency first aid course for all staff is recommended.

It may also be useful to have a number of first-aid packs containing a laminated copy of the accident and emergency procedures, which outgoing staff can collect from the EVC.

Depending on the nature, location and duration of the visit, this may range from: access to a kit and a mobile phone to call emergency services (local, short visit to regular venue), to fully qualified, specialist first aiders as accompanying staff (remote, extended stay, with self-led, adventurous activities). School should have a first aid policy in line with current LA guidance.

Supervision Roles

The main roles and responsibilities of staff and participants on educational visits are given elsewhere in this document and in the associated document called Standards for Educational Visits. Below are some practical tasks that fall to the various roles.

Party Leader

It is good practice for the party leader to:

- Allocate supervisory responsibility to each adult for named pupils.
- Ensure that each adult knows which pupils they are responsible for.
- Ensure that pupils know which adult is responsible for them.
- Ensure that all adults understand that they are responsible to the party leader for the supervision of the pupils assigned to them.
- Ensure that all adults and pupils are aware of the expected standards of behaviour.

Supervisors

It is good practice for supervisors to:

- have a reasonable prior knowledge of the pupils including any special educational needs, medical needs or disabilities;
- carry a list/register of all group members;
- directly supervise the pupils (except during remote supervision) particularly important when they are amongst with the public and may not be easily identified;
- regularly check that the entire group is present;
- have a clear plan of the activity to be undertaken and its educational objectives;
- have the means to contact the party leader/other supervisors if needing help;

- have prior knowledge of the venue – the party leader should normally have made an exploratory visit;
- recognise hazards and their potential risks, raise awareness of it to staff and pupils, and impose appropriate control measures where necessary;
- continuously monitor the appropriateness of the activity, the physical and mental condition and abilities of the group members and the suitability of prevailing conditions;
- be competent to exercise appropriate control of the group and to ensure that pupils abide by the agreed standards of behaviour;
- clearly understand the emergency procedures and be able to carry them out;
- have appropriate access to first aid.

Pupils and Young People

Each pupil or young person should:

- know who their supervisor is at any given time and how to contact him or her;
- have been given clear, understandable and appropriate instructions;
- rarely, if ever, be on their own;
- alert the supervisor if someone is missing or in difficulty;
- have a meeting place to return to, or an instruction to remain where they are if separated;
- understand and accept the expected standards of behaviour.

Head Counts

Whatever the length and nature of the visit, regular head counting of pupils should take place, particularly before leaving any venue. It is good practice for all supervisors to:

- Carry a register of all pupils and adults involved in the visit at all times.
- Ensure that pupils are easily identifiable, especially if the visit is to a densely populated area. Brightly coloured caps, t-shirts or a school uniform can help identify group members more easily.
- Avoid identification that could put pupils at risk e.g. name badges. (Although the name of a hotel, telephone number or a school name may be useful).

- Ensure all pupils are aware of meeting points.
- Ensure all pupils know what to do if they become separated from the group.

Buddy System

- This useful technique is where each child is paired with another pupil. Each regularly checks that the other is present and is ok. A variant of this is the 'circle buddy' system – the pupils form a circle at the start of the visit so that each pupil has a left side buddy and a right side buddy. He or she will check on these when asked. Thus two pupils cannot go missing together and not be missed (as might happen with paired buddies).

Rearranging Groups

Potential danger points can occur when rearranging 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.

It is therefore important that the supervisor clearly:

- takes responsibility for the group when their part of the programme begins, particularly making certain that all group members are aware of the changeover; and
- passes on responsibility for the group when their part of the programme is concluded, together with any relevant information ensuring that the group members know who their leader is.

Remote Supervision

This refers to the practice of supervising a group from a distance rather than being right alongside the pupils for the majority of the time.

It does not just mean supervision in remote or isolated places, as clearly most adventurous activities that take place in this environment are closely led or instructed.

There are groups however which use the self-reliance that is demanded by not having an adult nearby to achieve personal development and recognised awards e.g. Duke of Edinburgh Award expeditions.

The Duke of Edinburgh Award Scheme (www.theaward.org) has excellent guidelines within its Expedition Handbook and Mountain Training England (www.mountain-training.org) has also released a comprehensive guidance booklet on this subject.

There are a number of fundamental points that should be adhered to when considering remote supervision:

- it should only be undertaken by an appropriately trained and experienced supervisor;
- groups should be sufficiently trained and assessed as competent for the level of activity to be undertaken, including first aid and emergency procedures. Remote supervision will normally be the final stage of a phased development programme;
- pupils will be familiar with the environment or similar environments and have details of the meeting points and the times of meetings;
- clear and understandable boundaries will be set for the group;
- there must be clear lines of communication between the group, the supervisor and the school; do not rely exclusively on mobile phones;
- the supervisor should monitor the group's progress at appropriate intervals;
- the supervisor will be in the expedition or activity area and able to reach the group reasonably promptly should the group need support in an emergency.

There should be clear arrangements for the abandonment of the activity where it cannot be safely completed.

Downtime

- Group leaders should ensure that pupils continue to be properly supervised during downtime before, between and after activities, including the evenings on residential visits.
- A group occupied in study or activity is far safer than a group left to its own devices in an unfamiliar environment.
- Too much unstructured free time in a residential programme can allow time for mischief, bullying, homesickness and wandering off from the body of the group.

Levels of supervision must be assessed taking pupils' age, maturity, anticipated behaviour and the general location into consideration. Such an assessment should consider how pupils behave both separately and within peer groups;

It is good practice to undertake the following tasks listed below.

- Ensure that all staff and pupils understand the standards of behaviour that apply at all times, not just during activities.
- Ensure that handover between activities is properly supervised, with a named supervisor responsible for the group if there is downtime between activities.

- Use down-time in the evening or at the beginning of the day to brief the group on the planned activities for the day to come, e.g. the planned learning outcomes, specific health and safety issues, meal and break times, etc.
- Use downtime after activities for individual reflection on personal learning outcomes, and group discussion about the highs and lows of the day.
- Apply the advice contained in “Remote Supervision”, adapted if necessary, if it is felt reasonable to allow pupils some time without close supervision.
- Occupy the group with mildly active, non-academic activities in the evening, e.g. craft activities, environmental activities, quizzes, team challenges, led walks.
- Ensure that all supervisors understand that their role continues in the evening – however hard a day it has been.
- Where staffing levels and conditions permit, timetable non-contact time for staff, so that they are sufficiently rested to supervise competently when on duty, particularly if driving.

Overnight Supervision

Group leaders should ensure that:

- The group’s sleeping accommodation is exclusively for the group’s use.
- Staff (of both genders where appropriate) have sleeping accommodation on the same floor immediately adjacent to the pupils’ accommodation.
- There are staff present on that floor whenever the pupils are there.
- Child protection arrangements are in place to protect both pupils and staff.
- Where hotel/hostel reception is not staffed 24 hours a day, security arrangements should be in force to stop unauthorised visits.
- In the absence of 24 hour staffing of reception, external doors must be made secure against intrusion and windows closed as necessary to prevent intrusion.
- Where possible internal doors are lockable but staff must have reasonable access to the pupil accommodation at all times.
- Where pupils’ doors are locked, teachers have immediate access, as necessary, to a master key.
- All staff and pupils know the emergency procedures/escape routes in the event of a fire. Where windows and doors are locked against intrusion at night, ensure that alternative escape routes are known and that all fire doors function properly.
- They are not lulled into a sense of false security by local assurances, such as “no need to lock doors in this part of the country”. The presence of the group may attract unwelcome attention that is unusual in the locality.
- There are clear agreements between staff and pupils about quiet and sleep times.

Travel

Transporting pupils by road is statistically the highest risk activity pupils will be involved in on educational visits and its planning is considered in further detail in another section in this document.

The party leader is responsible for the party at all times including maintaining good discipline.

The driver must not be responsible for supervision. There are occasions when small groups are driven by one member of staff in a car or minibus which should be done only if a risk assessment deems it safe to do so and child protection issues have been considered.

All party members should be made aware of the position of the emergency door and first aid and anti-fire equipment on transport.

The alternative arrangements, routes or means of transport in the event of delay, cancellation, accident or breakdown must form part of the risk assessment for the visit.

Factors that the party leader should consider when planning supervision on transport include:

- booking transport – the party leader should arrange for seats to be reserved well in advance to ensure that the party can travel together.
- seats are reserved for supervisors that allow them to supervise properly.
- level of supervision that will be necessary on double decker buses/coaches – one supervisor on each deck should be appropriate in normal circumstances.
- pupils should be made aware of safety rules and expected standards of behaviour.
- safety of pupils whilst waiting at pick-up and drop-off points and when getting on or off transport, particularly when using UK vehicles abroad.
- safety while on stops or rests during the journey – party leaders should plan with the driver sufficient stops at suitable areas to ensure the safety of all party members including the driver.
- consider whether a visible and easily recognisable article of clothing should be worn in common by pupils.
- drivers of buses and coaches must comply with legislation covering maximum periods of driving and minimum rest periods.
- a system for checking that seat belts are fastened.
- pupils should be made aware that they are not allowed access to the driving area at any time.
- safety on buses, trains, ferries and boats – the party leader should make clear to pupils how much or little freedom they have to roam. Misbehaviour is a main cause of accidents to children on such means of transport.

- staff and pupils must be fully aware of the impact of customs and security arrangements when travelling through ports and airports.
- safety of the party in the event of an accident or breakdown – the party should remain under the direct supervision of the party leader.
- evacuation procedures are clearly understood by everyone, luggage is securely stored and emergency exits are kept clear.
- supervision should always be carried out when the party is getting off or on to transport.
- party members should be made aware travel sickness tablets should only be administered to a pupil with previous authorisation from the parent.
- smoking/alcohol bans are observed.
- pupils are occupied on long journeys – this will help the journey pass quickly.

Section 5

Types of Visits

General

This guidance divides all visits into three categories to help identify the level of organisation and scrutiny that reflects the complexity and potential risk associated with different trips.

Consequently there should be no activities taking place off school premises that are not included within the scope of this document.

It is worth bearing in mind that whichever category the visit falls into the greatest objective levels of risk are associated with transport and road traffic and should be risk assessed accordingly.

Visit Categories

Off-site activities are divided into the three categories that are briefly outlined below.

Schools which are unsure as to which category to place an activity should seek advice from the LA's Outdoor Education Adviser.

THE EVOLVE ONLINE VISITS SYSTEM

The Evolve online visits system www.barnsleyvisits.net is used for the notification and approval of all Category B and Category C visits. Usernames and passwords are available for staff from each school or establishment via their Educational Visits Co-ordinator (EVC). EVCs and Head Teachers requiring usernames and passwords should contact the LA's Outdoor Education Adviser.

CATEGORY A

- These are activities that are perceived as presenting lower levels of risk.
- They would normally be curriculum-based activities that take place on a regular basis or occur largely within school time such as lessons or are activities and experiences that are considered as part of the school day.
- It also includes regular sporting activities on school days taking place immediately after school hours
- The head teacher must approve such activities, schools can record this in a format to suit their own purposes.
- Parental consent may be obtained annually if the school provides an outline of the visits or activities to take place. Template forms for this can be found in the annexes to this document.
- It should be possible to hold the majority of risk assessments necessary as

templates, e.g. coach transport, walking to local venues.

Examples

Visits to swimming pools, playing fields, sports halls, split site visits, work placements and community placements, local league sports fixtures.

CATEGORY B

- These are visits or activities that would not normally form part of the school day. They may extend significantly beyond the school day but would not involve an overnight stay.
- Approval is required by the head teacher using the Evolve online visits system at www.barnsleyvisits.net. It is recommended that details are entered on to the Evolve system at least two term-time weeks prior to the visit.
- Parents must be informed of such a visit and consent will be required in writing.
- Because they are more complex and involve a greater range of activities, template risk assessments will require reviewing and adapting where necessary, or new ones devised if necessary.
- Outside providers may well be employed to deliver part of the visit or activities – these will require any necessary checks being made.
- The competence of school staff who lead such visits and activities must be clearly identified by the EVC and Head teacher.

Examples

Visits to a museum, theme park, coastal visits, extended low-level walks, problem-solving or team-building sessions, and sporting fixtures that involve considerable travel or very late returns.

Environmental Conditions

In assessing the appropriate category in which to place an activity, the Party Leader and EVC should take account of the nature of the activity and the environment in which the activity takes place. An activity might be rated in a higher category if it takes place:

- in or near water;
- in winter conditions;
- on or near cliffs or steep terrain;
- in an area subject to extremes of weather or environmental change.

CATEGORY C

This is the most demanding category that involves pupils participating in adventurous or extended activities, or other activities that are carried out in higher risk environments.

It includes all:

- visits or activities that require an overnight stay;
- visits abroad;
- outdoor adventurous activities.

All Category C visits require:

- specific parental consent.
- site and activity specific risk assessments, put together by school staff or whoever is responsible for particular elements of the visit.
- the approval of the Head teacher and the LA. Application to the LA should be made via the Evolve online visits system at www.barnsleyvisits.net.
- Information should be provided to the LA via the www.barnsleyvisits.net system at least 4 term-time weeks prior to the visit. More complex visits should be notified much earlier than this. This will give sufficient time to follow up any missing information, and to ensure any alterations to the programme can be made well in advance of the visit.
- Safe supervision requires that the leader should have undergone an additional familiarisation process or induction specific to the activity or location.
- Further details of the three main types of Category C visit are given below.

Examples

Canoeing, caving, fell and mountain walking, mountain biking, ghyll scrambling, rock climbing, sailing, wild country camping, pony trekking, skiing, and swimming in natural waters. Pupil exchange visits; foreign study visits; residential educational courses; staying at a self-catering hostel or bunkhouse; overnight ferry crossings; skiing trips.

Adventurous Activities

A comprehensive, but not exhaustive, list of adventurous activities is included on the Evolve online visits system www.barnsleyvisits.net (by clicking the blue “i” button on the Visit Type screen) which should help schools to determine whether the planned activity falls into this group.

These activities can be led by school staff, but it is increasingly common for schools to pay a commercial provider to run them.

The major points for consideration when planning to engage in adventurous activities are:

- the EVC and Head teacher must confirm the competence of all leaders of adventurous activities;
- school staff leading activities must register details of their qualifications in the Awards section in their My Details area of the Evolve online visits system www.barnsleyvisits.net. Original copies of certification must be seen by the EVC or the LA's Outdoor Education Adviser;
- some activities fall within the scope of the Adventure Activities Licensing Regulations 2004, and schools should ensure that if they choose to use a commercial organisation to provide instruction for these, it is properly licensed;
- some adventurous activities fall outside the scope of the licensing scheme, but still need competent and/or qualified staff to lead or supervise and providers need to hold recognised external accreditation appropriate to their provision;
- specific advice can be obtained from the LA Outdoor Education Adviser.

Residential Visits

Even without other activities, the social and personal development opportunities for pupils inherent in the residential experience are acknowledged as being extremely valuable.

These experiences can range from staying in hotels, to outdoor education centres, to the use of bunkhouses and campsites.

In most cases, the less formal and publicly regulated the accommodation the more the responsibility for resources, security and safety falls directly on the accompanying staff. For example, there may be significant value in taking a small mixed group to a remote, basic one room bunkhouse. Clearly the issues around hygiene, privacy, security, and welfare will be directly under the control of the leading staff and will need very careful planning and pupil preparation. This may contrast with a staffed, regulated, and purpose-built residential education centre.

Issues for the party leader to consider include the following set out below.

- The ratio of responsible adult to pupils should be adequate to allow safe and supportive supervision.
- The group should ideally have adjoining rooms with teachers' quarters next to the pupils' – the leader should obtain a floor plan of the rooms reserved for the group's use in advance.

- There should be at least one responsible adult from each gender for mixed groups.
- There should be separate male and female sleeping/bathroom facilities for pupils and adults.
- The immediate accommodation area should be exclusively for the group's use.
- Ensure there is appropriate and safe heating and ventilation.
- Ensure that the whole group are aware of the layout of the accommodation, its fire precautions/exits (are instructions clear?), its regulations and routines and that everyone can identify key personnel.
- Security arrangements – where the reception is not staffed 24 hours a day, security arrangements should be in force to stop unauthorised visitors.
- The manager of the accommodation should be asked for assurances that the staff, including temporary workers, have been checked as suitable for work with young people.
- Locks on doors should work in the group's rooms but appropriate access should be available to teachers at all times.
- There should be drying facilities.
- There should be adequate space for storing clothes, luggage, equipment etc., and for the safe keeping of valuables.
- Adequate lighting – it is advisable to take a torch.
- There should be provision for pupils with special needs and those who fall sick.
- Balconies should be stable, windows secure and electrical connections safe.
- Where possible, pupils should not be lodged in ground floor rooms.
- The fire alarm must be audible throughout the accommodation.
- There should be recreational accommodation/facilities for the group.
- The hotel/hostel should be able to meet any particular cultural or religious needs of the group.
- There should be an appropriate number of group supervisors on standby duty during the night.
- After arrival at any accommodation, it is advisable to carry out a fire drill as soon as possible.
- Before booking a hostel/hotel abroad, the party leader should confirm it has fire exits and lifts with inner doors and that it meets local regulations.

The Outdoor Education Adviser may be able to give advice in addition to the previous experience of school staff at a particular venue.

Contractors and Activity Providers

Contractors for educational visits might be tour operators, expedition providers, outdoor education centres, local farms, civic museums and national bodies such as the YHA and others.

It is currently not feasible for BMBC to approve each commercial charitable or private facility on a regular and systematic basis although a Provider Form is available from the LA to help schools obtain suitable assurances from prospective activity providers. The Outdoor Education Adviser is available to provide further advice and guidance and also to explain the range of external accreditation schemes which are available for the verification of activity providers.

The Provider checklist in the annexe to this document lists questions that schools should ask contractors relating to safety management.

Where appropriate a pre-visit to the centre and/or references from previous users will help schools to decide if the centre will provide the right service, taking into account the age, abilities and needs of the particular group.

Contractors are responsible for assessing the risks of those parts of the visit appearing in the contract. Assurances should be obtained from providers that risks have been assessed and that the provider's staff are competent to instruct and lead pupils of the group's age range on the activity.

Contractors should provide details of any independent, inspection-based external verification.

Where the EVC does not feel competent to assess the validity of contractors' safety systems or assurances, advice should be sought from the LA's Outdoor Education Adviser.

Evaluation of External Providers

It is good practice for visit leaders to complete an evaluation form of Educational Visits and Off-site Activities. A copy of a form provided for this purpose is available in the annexe to this document. Completion and submission of the form will assist the LA in monitoring the suitability of external providers and will highlight any significant concerns and likewise positive outcomes.

Overseas Visits

Travelling overseas can be very rewarding for pupils and adults alike, but it is important that careful preparation takes place. Much of the earlier advice in this guidance applies to visits in the UK, but there are some additional factors that need to be considered when travelling overseas, not least because the legislation may be different from that of the UK.

School visits overseas can be made in a number of ways as follows.

Organising Your Own Visit

A Head teacher or party leader may decide to organise a package abroad without the help of an outside body.

If a school chooses to do this they should be aware that if they organise and sell to parents a package of any two or more of: accommodation, transport or other tourist services not ancillary to transport they may fall within The Package Travel and Linked Travel Arrangements Regulations 2018. This may become complicated, and even though it is usually more expensive, most schools tend to use tour operators to make the necessary arrangements. However, if there are advantages to be had from putting together elements of a trip abroad some details are given later in this section.

Organising Your Own Transport

Party leaders should ensure that drivers taking groups abroad are familiar with driving the coach or minibus in the countries being visited and those on route. EU regulations require the fitment and use of a tachograph and prescribe maximum limits on driving time and minimum requirements for breaks and rest periods. Those regulations apply for most drivers of school passenger vehicles when undertaking an international journey. Different licence requirements apply for driving abroad. DfT can provide advice in the relevant transport legislation. See also the LA's Guidelines on the Use of Minibuses.

It is possible to hire a coach from the UK to transport the group to separately arranged activities and accommodation. In this scenario the coach company must be experienced and licensed to travelling overseas. Another option is public transport.

Factors to consider when travelling abroad include the following set out below.

- The need to be aware that different legislation and regulations may apply for drivers' hours and record keeping purposes.
- Drivers must observe the domestic rules of the countries being visited. Advice on domestic rules may be obtained from the relevant embassies of the countries concerned. See also Taking a Minibus Abroad (DfT).
- All group members should be aware of unfamiliar right-hand drive traffic. The passenger doors on UK minibuses and coaches may not open on the kerb side in countries where travel is on the right hand side of the road. Extra care will be necessary when the group is climbing in and out of the vehicle. Detours may be necessary to ensure safety.
- Carrying capacity and loading requirements also need to be considered then DfT can provide information on legal requirements for travel abroad.
- Supervision of groups travelling abroad using airports, bus, rail, and motorway service stations, must be particularly well organised.

Using a Tour Operator

Before using a tour operator party leaders should ensure it is reputable. Ascertaining this should form part of the risk assessment. The Party Leader, EVC, and head teacher should between them check that the company shows due diligence in checking for example, the suitability of the accommodation and transport. The Civil Aviation Authority (CAA) licences travel organisers and tour operators selling air seats or packages with an air transport element (Air Travel Organisers Licence or ATOL). The licence is a legal requirement and provides security against a licence holder going out of business.

A travel agent does not need to be an ATOL holder if acting only as an agent of an ATOL holder. But if so the party leader must check whether or not the whole package being supplied is covered by the ATOL. If it is not, the organiser must show evidence of other forms of security to provide for the refund of advance payments and the costs of repatriation in the event of insolvency. Some contractors may offer a pre-visit to overseas or other sites for party leaders free of charge. These may be arranged in conjunction with the local tourism authority. This can enable the party leader to gain a direct experience of the venue and environment and assist their appraisal of the contractors visit assessment.

There are a number of government approved bodies:

- Association of British Travel Agents (ABTA);
- Federation of Tour Operators Trust (FTOT);
- Association of Independent Tour Operators Trust (AITOT);
- Passenger Shipping Association (PSA);
- The Confederation of Passenger Transport (CPT);
- Yacht Charter Association (YCA);
- The Association of Bonded Travel Organisers Trust (ABTOT).

It is advised that any tour operator being considered should provide a copy of their Safety Management System to the EVC.

Operators Based Abroad

If using a tour operator not from the UK, then the bodies listed above are unlikely to have any jurisdiction.

Sources of Further Advice for School Travel Abroad

The [School Travel Forum](#) is a group of leading school tour operators that promote good practice and safety in school travel.

There are also voluntary bodies established to promote school journeys, such as the [School Journey Association](#).

The [Foreign and Commonwealth Office's \(FCO\) Travel Advice Unit](#). The Unit's purpose is to help intending travellers to avoid trouble abroad. It can provide information on threats to personal safety arising from political unrest, lawlessness, violence etc.

It is essential that the FCO Travel Advice is consulted regularly and acted upon in the lead up to any overseas visit.

Planning and Preparation

It is good practice that an exploratory visit to the location is made. If this is not possible, the party leader should gather as much information as possible on the area to be visited. This can be assessed from a number of sources e.g.

- the provider;
- the Foreign & Commonwealth Officer's Travel Advice Unit;
- other schools who have used the facilities/been to the area;
- embassies/consulates;
- travel agents/tour operators.
- the internet, books and magazines.
- local knowledge in-country.

Staffing the Visit

Staffing ratios and supervision arrangements for visits abroad are difficult to prescribe as they will vary according to the activity, the pupils' age and gender, the location, and the efficient use of resources. They must be based on careful consideration and risk assessment.

A ratio of 1 adult to 10 pupils is a general rule of thumb with the minimum number of staff being 2. There should be enough adults in the group to cover an emergency.

Mixed gender groups should have at least one male responsible adult and one female responsible adult.

Staff should have suitable language abilities for the country or countries being visited and know the contact numbers for the emergency services in-country.

Preparing Pupils for Visits Abroad

Factors to consider for visits abroad include:

- language – particularly common phrases;
- culture e.g. body language, rules and regulations of behaviour, dress codes, local customs, attitudes to gender;

- drugs, alcohol usage;
- food and drink – group members should be warned of the dangers of drinking tap water in certain countries. In some countries it is safer to drink bottled water, and care needs to be taken with raw vegetables, salads and unpeeled fruit, raw shellfish, undercooked meat or fish;
- money – how to carry money and valuables discreetly e.g. money belts, zip armlets. If larger amounts of money will be needed, it is advisable to take travellers cheques;
- how to use phones abroad, money required (phone card use often preferable), the code for phoning home, and the use of mobile phones;
- what to do in an emergency.

Briefing Meeting for Parents

It is particularly important that parents are given the opportunity to meet the teachers and others who will be taking the pupils overseas and that they are provided with full information and opportunities to ask questions and seek clarification on the visit upon which to base their decision on consent.

Medical Precautions

Consult the Foreign and Commonwealth Office's travel Advice site www.gov.uk/foreign-travel-advice for the relevant country for advice on medical precautions and ensure suitable insurance arrangements are in place.

It is advisable to take a contingency fund as sometimes treatment must be paid for in advance and money has to be claimed back later.

The party leader should find out whether vaccination is necessary and ensure that all members of the group have received it in good time. Check whether the country to be visited requires proof of vaccination. The Department of Health gives advice on vaccination requirements in their Health Advice to Travellers information.

Insurance

The party leader must ensure that the group has comprehensive travel insurance to cover all foreseeable circumstances.

Any school planning a trip abroad and whose insurance is arranged through BMBC must contact the Insurance Section of Barnsley Council well in advance of the visit to notify them of the details and ensure adequate cover. Telephone 01226 773239

Establishments with different insurance arrangements are advised to contact their insurers to notify them of the visit well in advance and to check their insurance is suitable.

Foreign Legislation

The party leader must check relevant legislation, particularly on health and safety e.g. fire regulations and be aware of any local customs and practices that affect the party whilst it is abroad.

Language Abilities

One of the adults with the group should be able to speak and read the language of the visited country. If not, it is strongly recommended that the leader or another adult learns enough of the language to hold a basic conversation and knows who to contact and what to say in an emergency. It is also advisable that pupils have a basic knowledge of the local language before the visit.

Passports

Some states may not allow in a traveller whose passport will expire within a few months of entry. The party leader or EVC should personally check the passports of all supervisors and pupils in the early stages of planning the trip to mitigate the risks of anyone being turned back from the borders of the venue country or any countries being travelled through. The EVC or the party leader should contact the UK embassy or consulate of the relevant country or countries for details.

Current information relating to all types of passport, including collective passports, is available from HM Passport Office at:

www.gov.uk/government/organisations/hm-passport-office

Nationality and Visa Exemption

Check whether visas are required for all members of the group including those who are not British nationals.

If the group includes pupils whose national or immigration status or entitlement to a British passport is in doubt, it is advisable to make early enquiries of the UK Visa and Immigration Service concerning the requirements of the immigration rules and the right of re-entry.

Check whether any pupils may need to use separate passport control channels from the rest of the group.

Care Orders and Wards of Court

If a child is subject to a care order, foster parents will need to ensure that the Social Services Department consents to any proposed trip. If a pupil is a ward of court, the head teacher should seek advice from the court in relation to school journeys and activities abroad well in advance.

Documentation

The party leader should ensure that they obtain and take with them/have ready access to the items listed below, ensuring the security of personal information in compliance with relevant data protection requirements.

- Travel tickets, passports and visas. It is also advisable to carry a separate list of the numbers of any travel documents passports and photocopies of all the group's documents in a sealed waterproof bag.
- A copy of the contract with the centre/hotel if appropriate.
- Medical papers and significant medical histories.
- Parental consent forms and permission for party leaders to authorise emergency treatment on parental behalf.
- The phone numbers and addresses, at home and in school, of the Head teacher and of the school contact.
- The names of parents and the addresses and telephone numbers at which they can be contacted (home and workplace).
- Copies of a list of group members and their details.
- Details of insurance arrangements and the company's telephone number.
- The name, address and telephone number of the group's accommodation.
- Location of local hospital/medical services.

The party leader may wish to ask parents for passport size photographs of the pupils. It might be useful to have photographs of the adults in the group as well.

Information Retained at the School

Full details of the visit should be retained at school while the visit is in progress. This must include the items listed below:

- the itinerary and contact telephone number/ address of the group;
- a list of group members and their details;
- contact names, addresses, telephone numbers of the parents and next of kin;
- copies of parental consent forms;
- copies of travel documents, insurance documents, medical papers;
- a copy of the contract with the centre/hotel if appropriate;
- LA emergency contact numbers;
- school contact numbers.

It is the Head teacher's responsibility to ensure this information is available at all times. This is particularly important if the visit takes place when the school is closed.

Contacts at Home

It is advisable to have a responsible adult/contact at home with a valid passport, who could go to the area being visited to provide support to the group in the event of an emergency.

During the Visit

- It is advisable for pupils to carry a note in the relevant foreign language for use if they get lost, asking the reader to re-unite them with the group at the

accommodation/meeting point, or to take them to the police station. They should also carry the party leader's name and the duty contact's phone number.

- All group members should carry at all times an appropriate amount of foreign currency e.g. for telephone calls (or a phone card).
- It is important to be able to identify group members readily e.g. uniform, brightly coloured backpack, cap or item of clothing, badges. However, no student should display their name clearly on their clothing – this could result in their being isolated from the group by an apparently friendly, personal call.
- Party leaders need to be aware that some diseases are more prevalent in some countries than in others and should know what action to take should a member of the group become infected.
- Many of the health problems of pupils on longer visits are caused by lack of food, liquid or sleep.
- The party leader should take this into account at the planning stage and take measures to prevent these risks. If appropriate, parents should be asked to provide suitably factored sun creams, hats etc.

Emergencies

The party leader must ensure that all members of the group know what action to take if there is a problem.

The party leader and supervisors should know where the nearest British Embassy or Consulate is located and the telephone number. Depending on the age of the pupils, it may be appropriate to ensure that they have this information to hand.

**Should a genuine emergency occur the Party Leader should contact the LA
Emergency Number:**

(01226) 787080

or

(01226) 296800

This will also ensure that the correct information reaches the school, parents and public.

Travel by Air

Taking a school group on an aircraft requires careful planning and preparation. The airline/travel agent will be able to advise in particular requirements. If the group includes any members with disabilities, it is advisable to check that the airline has a wheelchair service and lifting facilities (if appropriate). The party leader must resist any attempt by the airline to split the group between different aircraft.

Exchange Visits

The success of an exchange visit largely depends on good relationships and communications with the partner school.

Individual school exchanges differ from other visits abroad in that pupils will spend most of their time with host families and are, therefore, not always under the direct supervision of school staff. Host families abroad will not be subject to English law.

Pupils must be aware of the ground rules agreed between the party leader and the host family. Many of the considerations that apply to residential and day trips also apply here. In addition, the following should be ensured by the party leader:

- a good personal knowledge of the host school and counterpart;
- satisfactory 'pairing' arrangements, matches should be appropriate;
- the partner school should tell the host families of any special, medical or dietary needs of their guests' age and gender;
- parents, pupils and the host schools should be clear about the arrangements for collecting and distributing pupils to families, and for transporting pupils throughout the visit;
- the head teacher should retain a list of all the children involved and their family names and addresses;
- pupils living with host families should have easy access to their teachers, usually by telephone;
- parents should be made aware that their children living with host families may not always be under direct responsible adult-supervision.

Vetting Host Families

Where overseas students are being hosted by families in the UK, suitable child protection measures must be in place which comply with the statutory guidance provided by the DfE.

Exchange or home stay visits for UK students staying overseas may be arranged through agencies, in which case the agency should have some responsibility for vetting the host families. EVCs and Party leaders making their own arrangements need to be clear about procedures in the relevant country for vetting the suitability of host families including criminal background checks insofar as these are available.

If the host school or placing agency does not have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange or home stay pupils, the party leader should seek further assurances and/or reconsider whether the visit should take place.

Expeditions

Expedition is a term used to describe a self-sufficient trip to more remote areas, and can take place both at home and abroad, as different levels of isolation and dependency are used to match the participants' abilities and needs.

Expeditions will by their nature contain at least two of the elements that define a Category C visit:

- residential- usually an extended stay, distant from the home base; and
- adventurous activity- the inherent mode of travel is often on foot, bike or water, and accommodation may well be through wild camping (e.g. Duke of Edinburgh Award Scheme).

When an expedition takes place abroad and it involves all three of the factors that put the trip into Category C, and the levels of planning and supervision significantly increase to reflect the higher levels of risk that come with them.

As with all visits and activities the staff leading these trips must be suitably competent.

Expeditions Abroad

Schools wishing to organise expeditions abroad either independently or through a commercial company must liaise with the LA's Outdoor Education Adviser well in advance of the visit at the earliest possible opportunity (at least 12 months in advance).

Such expeditions are normally planned up to two years in advance, providing schools with plenty of time to inform the LA and obtain the necessary support and guidance.

It is particularly important to ensure early in the process well thought out procedures for the selection of suitable staff and participants for expeditions abroad to ensure the suitability of all participants in the venture.

Many expeditions in the UK and overseas take place for the Duke of Edinburgh Award Scheme. Further advice is available from the BMBC Outdoor Education Adviser and from the Duke of Edinburgh's Award.

Remote supervision can be a common theme on these types of expedition and is addressed elsewhere in this document.

Further advice on activities making up an expedition can be sought from organisations such as the Outdoor Education Advisers Panel, the Duke of Edinburgh Award Scheme Expedition Handbook the Young Explorers Trust, or the Royal Geographical Society.

Section 6

Risk Assessment

Background

Accidents can happen in any activity regardless of whether it is classified as high or low risk. The same levels of supervision and vigilance are necessary in all activities regardless of their nature, frequency or duration. It is important to remember that low risk does not mean no risk.

Risk assessment is a legal requirement and should be seen as a substantial aid to the planning process, rather than a bureaucratic obligation.

For educational visits, risk assessment involves the careful examination of what could cause significant and foreseeable harm during the visit and whether enough precautions have been taken or whether more should be done.

The following points should be carefully considered during the risk assessment process.

- The aim is to reduce to an acceptable level the risk of injury or illness occurring to anyone involved in the visit or anyone who may come into contact with the party (e.g. general public).
- Risk assessments need to be produced for activities, venues and programmes that present significant foreseeable hazards.
- The most appropriate, competent person should assess particular risks, i.e. organising staff the activities for which they are supervising, external providers for the activities they lead.
- The significant findings should be recorded.
- Risk assessments should be reviewed, periodically to consider whether they are still valid, or if there is reason to believe they are no longer valid, or if circumstances change significantly.
- If changes are indicated by the review process, they should be made to the risk assessment and communicated to those using the risk assessment.
- Careful recording of risk assessments will mean that they do not have to be started afresh for each visit.
- The hazards and control measures as set out in the risk assessment should be understood by all those involved.
- Risk assessments should explicitly cover how special educational and medical needs are to be addressed.

- The process of risk assessment should be on-going during the conduct of the visit (dynamic risk assessment) to ensure sound judgements are made in changing circumstances.
- They should include details of contingency measures – a plan B.

Hazard and Risk

Throughout this document, the terms hazard and risk are used. They are used in the following context:

- hazard is something with the potential to cause harm e.g. a hazardous activity is one that could cause injury.
- risk is the likelihood and consequences of a hazard causing harm.

Any visit/journey should be assessed from the point of health and safety issues, and be planned accordingly.

Every visit/journey should always be thought of as potentially hazardous until investigations show that the risk of injury or harm is either low or has been minimised due to precautions (known as controls) that are in place.

Where the visit/journey is identified as being of low risk, the control measures may be minimised, and it should be possible to reduce the amount of record keeping without compromising the safety of the pupils.

Risk-Benefit Assessment

At the time of writing, there is some consideration being given nationally to the role of risk/benefit assessment in the process of risk assessment in relation to educational visits and activities.

Risk/benefit analysis is the comparison of the risk of a situation to its related benefits. It is important to consider very carefully the aims, purpose and outcomes of any proposed visit or activity in relation to the associated risks, bearing in mind that the statutory requirement to ensure the health and safety of all those involved through proper risk assessment and risk management remains paramount.

Exploratory Visits

No matter what type of visit is planned, there is no real substitute for staff having knowledge of the venue and experience of the activities involved. This is particularly relevant when the visits are residential, overseas, or involve adventurous activities (Category C visits).

One of the methods of achieving at least a basic level of this knowledge is to make an exploratory visit.

This knowledge will form part of the risk assessment and pre-planning.

It may not always be practicable for this to happen for all visits, particularly when large costs or distances are involved. In these cases as much information as

possible must be gathered from reputable sources (e.g. previous groups, technical advisers, Tourist Information Offices, commercial providers, the Internet) as a basis for risk assessment. If any doubt exists whether a satisfactory risk assessment can be made, seek advice from the Outdoor Education Adviser before proceeding.

The advantages of the party leader undertaking an exploratory visit are to:

- ensure at first hand that the venue is suitable to meet the aims and objectives of the school visit;
- obtain names and addresses of other schools who have used the venue;
- obtain advice from the Manager;
- identify potential areas of hazard;
- ensure that the venue can cater for the needs of the staff and pupils in the group;
- become familiar with the area before taking a group of young people there.

Many schools will take new groups of pupils to the same location each year. As some factors will change from year to year, it is prudent to reassess the risks each time – even when the party leader may be the same. However, if they are carefully recorded and reviewed this should be a straightforward task.

Types of Risk Assessment

Risk assessments for educational visits may be usefully considered as having three levels.

Template (or generic) risk assessments, which are likely to apply to an activity wherever and whenever it takes place.

Visit/Site specific risk assessments, which differ from place to place and group to group.

Dynamic risk assessments - the aim of the risk assessment process should be to use them as an integral useful part of the planning process, that can be effectively re-used.

Generic Risk Assessments

Generic risk assessments of common activities can be used and adapted where appropriate. Some generic risk assessment templates are available on the Evolve online visits system, and it should be possible to keep a record of all those developed specifically through the school.

These are risk assessments of common and frequently used activities that take place on educational visits, such as forms of transport, and once compiled can be reused as a standard template **providing any specific issues are also addressed and they are adapted for any specific circumstances of a visit.**

These generic risk assessments should be drawn up by a competent person who has experience and knowledge of health and safety in conjunction with people with the relevant educational experience.

The LA has compiled a selection of useful templates, which can be obtained via the Evolve online visits system or the Outdoor Education Adviser. They are based on a model compiled by the LAs across the region.

These address the most frequently encountered hazards on a number of common activities.

It is essential that users of these templates add to or adapt these for their particular circumstances.

Visit/Site Specific Assessments

The following **Five Steps to Risk Assessment from the HSE** apply both to the template example and the specific risk assessment.

1. Look for the hazards
2. Decide who might be harmed and how
3. Evaluate the risks and decide how the initial level of risk can be reduced by introducing appropriate control measures
4. Record these findings in a clear useful format
5. Review and adapt these assessments when appropriate

Because visit/site-specific risk assessments are applicable specifically to the venue, group or activity being undertaken, they must be undertaken before each planned trip.

It is the responsibility of the school or other establishment to conduct and record the significant findings of risk assessment as set out in the Standards section of this document.

Note the following:

- Recorded assessments only need to be made for risks that are deemed to be significant and reasonably foreseeable (medium or above on charts that follow).
- The level of detail contained in recorded risk assessments should be proportionate to the specialisation, complexity and level of risk involved in the activity.
- School staff only need to produce assessments for parts of the visit for which they are directly responsible – if an outside provider is running an element of the visit, they are equally as obliged to have assessed any risks involved, and recorded where necessary.
- Staff are entitled to ask for an external provider's assessments for inspection, but if they are accessible via the Internet, or on site, it is not always necessary to have them reproduced on paper.
- There is no reason that previously used similar assessments cannot be reviewed and adapted to save unnecessary repetition.

- Schools may attach risk assessments to the Evolve form if they wish. The EVC & Party Leader must assure the LA that they have been produced during planning, and LA officers may access them at any time as part of the monitoring process.
- Visit and site specific risk assessments should inform school based policies and procedures. These school-based procedures should complement those of the LA.

The HSE's Five Steps to Risk Assessment in Practice

1. Look for the hazards

Hazards can be identified from previous staff experience, exploratory visits, or information compiled from other sources.

Only those hazards that present significant, reasonably foreseeable risks need recording – everyday situations, or hazards that are recorded elsewhere do not need to be reconsidered.

In the example above weather has been identified as the activity takes place out of doors.

2. Decide who might be harmed and how

The risk is the chance high, medium or low (and the consequences of the risk being realised) that someone could be harmed by the identified hazard.

The risk is not always to the pupils or staff; there are times when the actions of the group can present a risk to the public.

Even the most public of venues may have specific risks attached to it such as the proximity of deep water, roads, or installations.

It is only possible to assess the risks of occurrences that are reasonably foreseeable.

3. Evaluate the risks and decide how the initial level of risk can be reduced by introducing appropriate control measures

Particularly when the organising staff are experienced, there is an automatic tendency to visualise the control measures that reduce risks, so that the risk is assumed to already be low.

The risk assessment process demands that the risks are considered before control measures are put in place – a) because this means that they are given the required level of scrutiny, and b) so that the details and rationale are clear to the less experienced who need to use the assessment.

The risk rating is a function of:

a) how likely is the hazard to cause harm;

and

b) if it did cause harm, how serious would it be?

On the risk matrix given any activity which remains medium/high or high after control measures are in place must not be undertaken.

RISK MATRIX

		CONSEQUENCE		
		SLIGHTLY HARMFUL	HARMFUL	EXTREMELY HARMFUL
LIKELIHOOD	HIGHLY	LOW RISK	LOW/MEDIUM RISK	MEDIUM RISK
	POSSIBLE	LOW/MEDIUM RISK	MEDIUM RISK	MEDIUM/HIGH RISK
	UNLIKELY	MEDIUM RISK	MEDIUM/HIGH RISK	HIGH RISK

Once the control measures have been decided on, they are expected to bring the risk down to be Low/Medium.

There are a number of specific hazards that deserve particular attention:

The medical needs of pupils. Control measures include ensuring the party leader is aware of the known health problems of the group; sufficient medication is provided; there are sufficient adults competent in dealing with the medical problems with the group; and there are contingency measures in place for the group to be adequately supervised if an adult has to accompany a child to hospital.

The weather conditions and environment. Control measures include: obtaining local intelligence of tides; potential for flooding or flash floods; likelihood of sudden weather changes in mountains; extremes of temperature, etc; planning the itinerary to take the possible change into account; suitable clothing; ensure pupils understand the risks and the reasons for the control measures, and having plan B assessed in case plan A has become too hazardous.

Crossing roads, railways, rivers etc. Control measures include local intelligence; information on where the controlled or otherwise less dangerous crossing places are; ensuring appropriate levels of supervision and that pupils are aware of, and comply with rules.

4. Record these findings in a clear useful format

The blank risk assessment proforma provided in the appendices, and the information above should enable staff to produce clear risk assessments that can be understood by someone other than the compiler.

If schools currently have an equally clear and comprehensive model for risk assessment, then there is no need to convert them to the one in this guidance, but it is recommended that any new assessments are done in a clear format which reflects this process.

5. Review and adapt these assessments when appropriate

This is the most commonly overlooked aspect of risk assessment, because once a trip has returned safely and successfully there is a tendency for everything to be filed away until the next trip is imminent.

There are a number of advantages to ensuring that risk assessments are reviewed and any necessary changes are made as soon as possible:

- any 'near misses' or changes to control measures that had to be made during the visit will still be fresh in peoples' minds;
- it will inform decisions about the appropriateness of that type of visit for the future;
- in the pressures that surround organising the next trip it will mean that there is less to do;
- the reviewed assessment will actually make a useful contribution to the planning;

Dynamic (Ongoing) Risk Assessments

The party leader or other adults with responsibility should reassess risks while the visit is taking place. Dynamic risk assessments normally consist of judgements and decisions made by competent people as the need arises.

They should be informed by the risk assessments already in place, and take account of local expertise on changes in local conditions etc. They should be reviewed as appropriate to inform future planning.

The fact that they are not recorded during the planning process does not make them any less important than those written down. Particularly in outdoor and adventurous activities they are crucial, and the ability to reassess a current situation make sound decisions around it is the foundation of many qualifications in outdoor activities.

Examples of the need for dynamic risk assessment:

Changing weather, tiredness or illness within the group, behaviour, issues with other groups at the same venue, transport difficulties, etc. Control methods would often include deciding to change to the pre-assessed plan B or swapping activities on the itinerary so that the activity can be carried out on a different day.

Risk assessments are designed to minimise the chance of circumstances getting out of control and leading to accidents, but factors that could not be reasonably foreseen can take the situation beyond the influence of even ongoing risk assessments.

Although rare, genuine emergencies should be considered in the planning, for example in the first aid expertise required for the activity, selection of a deputy leader, and awareness of all about the emergency procedures.

To help deal with an emergency there is an immediate action sheet provided in the appendices, which could be carried by Party Leaders, however no two accidents are alike, and there are likely to be a range of ongoing risk assessments that are necessary to minimise the impact of the situation on the whole group.

Emergency procedures are dealt with in greater detail in a subsequent section of this guidance.

Party leaders are always in charge. They should trust their own knowledge of the young people and use their own professional judgement. This may include challenging an activity leader where the party leader's knowledge of the group is superior or intervening to prompt a change of plan, including stopping an activity if it has become too hazardous.

Infection Prevention and Control

Infection prevention and control should form an integral element of the risk assessment and risk management plan for all educational visits. Careful attention should be paid to known hazards and risks associated with particular environments and activities as well as to know outbreaks of disease or infection which may pose a risk to the group.

If an infectious disease outbreak occurs, contact the local Health Protection Team for the venue for infection control advice and ensure the information is passed on to the school, setting and venue involved and also to the BMBC emergency on call team.

Local area Health Protection Team contact details are available via:
<https://www.gov.uk/health-protection-team>

Section 7

Preparing Pupils

General

Pupils have an important part to play in the preparation of a school journey or visit. Pupils who have been involved in the preparation process are more likely to make informed decisions and be more aware of the hazards and risks involved.

Methods of setting ground rules can vary from presenting a teacher-determined set of rules, to agreeing a contract by discussing an acceptable code of conduct with the pupils and the reasons behind it.

During the preparation period the party leader should decide how to provide information.

More information will have to be provided for a Category C visit because it involves travelling long distances, overnight stays, may include adventurous activities, and be more complex in its structure.

Before a journey or visit takes place, pupils should understand the list of points shown below.

- The aims and objectives of the visit/activity.
- The background information about the place visited.
- If appropriate some basic foreign phrases or words.
- If appropriate information on different cultures and customs they may encounter.
- Why safety precautions have been put in place.
- What hazards and risks they are likely to encounter.
- What standard of behaviour is expected from them.
- What the basic emergency procedures are.
- The nature of the activities planned.

If the party leader has delegated responsibility to another adult for sections of the party, pupils should be aware who is responsible for them.

If the planned schedule changes for any reason then the situation needs reassessing and any new information passing on to all concerned, especially pupils.

If pupils are to undertake any kind of remote supervision, reference should be made to Supervision/remote supervision section of this document.

Equal Opportunities

Every effort should be made to ensure that school journeys and activities are available and accessible to all who wish to participate, irrespective of special educational or medical needs, ethnic origin, gender or religion.

All pupils should be encouraged to participate in as wide a range of activities as possible. Pupils should be encouraged to take on challenges during adventurous activities, but should not be coerced into activities of which they have genuine fear.

Selection of visit venues, activities and methods of facilitation should be considered at the outset of planning to ensure that no pupils are unnecessarily excluded.

Care taken at this early stage will avoid potential confrontation with parents for whom the trip is considered inappropriate by staff.

Where the educational visit is part of the curriculum, the decision not to take a particular child is particularly contentious. To exclude a pupil from participating would need a rationale supported by a risk assessment to prove that there were risks in taking the pupil that could not be sufficiently reduced by implementing reasonable control measures.

Another potential barrier for some pupils participating in educational visits is cost. Advice and guidance on charging is set out in the BMBC Policy on Charging for School Activities.

Staff involved in planning visits (particularly EVCs) should be very aware of how the school's charging policy affects any costs passed onto parents, including requests for voluntary contributions.

Pupils with Individual and Medical Needs

Supporting and preparing pupils with either individual or medical needs is extremely important, as additional measures may need to be put in place. These measures need to be clearly understood by parents, staff and all pupils. Additional measures for pupils with restricted mobility, e.g. wheelchair users, may also be necessary.

Under the Equalities Act, it should be easier to access public venues, but exploratory visits by staff remain the best way to check the suitability of a chosen site.

The following factors should also be taken into account if considering taking a pupil with specific needs.

- Is the pupil capable of taking part in and benefiting from the activity?
- Can reasonable adjustments be made so the activity can be adapted to enable the pupil to participate at a suitable level?
- Will additional/different resources be necessary?

It may be helpful to the pupil if one of the supervisors already knows them well and fully appreciates their needs. The party leader should discuss the visit with the parents of pupils with individual needs to ensure that suitable arrangements have been put in place to ensure their safety.

Additional measures to those already in place in the school may be necessary to support pupils with medical needs during visits.

If the pupil has a Care Plan its implementation must be carefully considered and where necessary have been agreed by discussion between the parents, the school, and the relevant medical specialist.

Putting these measures in place clearly becomes more difficult with the duration of the visit and the complexity of the activities involved.

Guidance has been issued to schools – “Supporting children who have a Medical Need”, which should help inform decisions made around the impact medical conditions will have on the organisation of visits of pupils with these.

In respect of medicines, this can be divided into four categories.

- Administering over the counter medicines.
- Administering prescribed medicines where the course of treatment continues into the start of the visit.
- Administering a medical procedure.
- Administering an emergency medical procedure.

Although the first two categories may be simply resolved by obtaining parental and medical practitioner consent, and following labelled instructions, the third and fourth may entail a combination of:

- parental consent;
- detailed instructions;
- pupil self-awareness;
- specialist medical agreement;
- notification of emergency medical services at the proposed venue;
- provision of correct facilities to store medicines on site;
- willingness of accompanying staff to undertake procedures;
- training of volunteers in the procedures;
- checking insurance policies will provide cover;
- including parents/carers to accompany the trip.

Advice on this exists in separate guidance provided by the LA.

Conduct/Behaviour of Pupils

Pupils, whose behaviour is such that the party leader is concerned for their safety, or for that of others, may be withdrawn from the activity.

On residential visits the party leader should consider whether seriously misbehaving pupils should be sent home early.

Parents and pupils should be told in advance of the visit about the procedures for dealing with misbehaviour, how a pupil will be returned home safely and who will meet the cost.

A pupil must not be returned home unaccompanied; therefore it would either involve a member of staff accompanying the child (with the associated financial cost) or the parent being requested to collect the child.

Should an incident on a visit abroad occur, the issue of returning a pupil home is more problematic. The Party Leader and the EVC should have agreed a strategy in principle with the Head teacher and base to deal with this including how any additional costs will be met.

It may be necessary before setting the return operation in motion to liaise with the LA to ensure that the procedures are in line with current guidance.

Consideration will need to be given if a member of staff is involved in accompanying a pupil home from a visit that this does not put pressure on the staff/pupil ratio of the remaining party.

Section 8

Communicating with Parents

Parents should be informed in writing of any off-site activity or visit unless it is a regular part of the school curriculum which parents have already been informed about through the school prospectus or a letter. Seeking annual consent for such routine visits may be appropriate.

Information

Before residential visits, or when pupils are to travel abroad or engage in adventure activities, parents should be encouraged to attend a briefing meeting where written details of the proposed visit should also be provided. There should be alternative arrangements for parents who cannot attend or who have difficulty with communication in English.

Parents need to be aware that the teachers and other adult supervisors on the visit will be exercising the same care that a prudent parent would. They will act with the degree of care that any responsible parent would demonstrate for his or her children's safety.

The list below gives the information that schools should give to parents in writing before obtaining their written consent for journeys abroad, adventurous activities or residential visits in the UK.

Day visits require a shorter list but, if the return is after school hours and/or hazardous pursuits are included, most of the information below will be required.

- a) Dates of the visit.
- b) Times and venues of departure and return.
- c) Method of travel, including name of travel company.
- d) Destination with full address of any accommodation and contact telephone numbers.
- e) Emergency contact arrangements between school, home, and any accommodation
- f) Details of accommodation with security and supervisory arrangements on site.
- g) Confirmation to parents of the steps of approval for the visit, i.e. Head teacher, and LA accordingly and full information on any conditions that have been stipulated.
- h) Details of meetings/parents evenings to give detailed information about the visit.
- i) Handouts and other information about the arrangements to fully inform those who are unable to attend meetings.

- j) Names of the co-ordinating and accompanying staff and volunteers, their status (e.g. Parent) and responsibilities during the visit.
- k) Details of experience and expertise of any staff leading specialist activities.
- l) Objectives of the visit, type of activities planned (any activity involving special hazard must be clearly specified), and details of all possible activities.
- m) Cost, what any payment covers and does not cover.
- n) Methods of payments and cancellation arrangements.
- o) Advice on pocket money for pupils.
- p) Insurance cover for the pupils in respect of baggage, accidental medical cover, and cancellations.
- q) Clothing/footwear and other items to be taken. Prohibited items.
- r) Code of conduct. Details relating to the standard of behaviour expected from the pupils during the visit, including rules on mobile phones, electronic equipment, smoking and alcoholic drinks.
- s) Details of the arrangements for the early return of pupils.
- t) Details of the arrangements for emergency medical treatment.
- u) In cases where pupils have medical needs e.g. anaphylactic, information on Availability of trained staff accompanying trip in case of emergency medical procedures are required.
- v) On exchange visits, there should be comprehensive details of the arrangements including those of the host families and the itinerary.

Parental Consent

Although the term parental is used generically, the consent for pupils to take part in an educational visit should be sought from whoever is the legal guardian and carer.

This is not always as straightforward as it appears when children no longer live with biological parents. Party Leaders should check details with the school office.

Consent should always be given on the basis of the information provided, as outlined above.

For Category A visits which take place in school time, which are local to the school and are a regular and routine part of the curriculum schools may choose to gain annual parent/carer consent, having outlined the type of activities likely to be involved in these visits. Clear information should be provided to parents about where and when such visits and activities are taking place and to provide parents with the opportunity to withdraw their child from the visit or activity if they choose.

For Category B and C visits, information about the individual trip must be supplied to parents/carers, and specific parental consent must be sought, and any medical information updated, as specified elsewhere in this guidance.

Nursery age children

On all occasions where children of nursery age are to be off the school site for any period of time, parents must be informed and their consent given.

Primary age children

Schools will have to exercise their judgement on whether they need to reinforce information for parents and get specific consent for Category A visits. Doing so provides some reassurance, but does create additional bureaucracy for straightforward visits that might only be a local visit within minutes walking distance from the school.

Secondary age children

Schools will need to make a judgement with respect to each visit or journey that takes pupils away from the school site.

Routine curriculum related short visits may not require specific parental consent where the activity involved does not expose the child to significant hazard or risk and where the activity takes place wholly within the school day.

If parents withhold consent absolutely the pupil should not be taken on the visit but the curricular aims of the visit should be delivered to the pupil in some other way wherever possible.

If the parents give a conditional consent the Head teacher will need to consider whether the pupil may be taken on the visit or not.

A parental consent form should be completed for each pupil in the group. Besides conveying the parents' consent it could also form the basis for obtaining details required. If a tour operator is used it may be sensible to ask them what information to obtain. General issues to consider include:

- any allergies/phobias the pupil may have;
- any medication the pupil is taking (if so what the dosage is and who is to administer it);
- whether the pupil administers his or her own medication;
- any contagious or infectious diseases suffered within the family during the preceding 4 weeks and any other recent illnesses suffered by the pupil.
- any special/medical dietary requirements;
- whether the pupil suffers from travel sickness;
- information on any toileting difficulties;
- whether the pupil has any night time tendencies such as sleepwalking (for residential visits);
- the pupil's ability to swim in a pool or sea and their level of safety awareness;
- any other information which the parent thinks should be known;
- the parental home and daytime phone numbers and addresses;
- an alternative contact, with their phone number and address.

Schools should pass any relevant information to activity providers regarding children's special needs or physical or psychological conditions (e.g. learning difficulties). The amount of information required may depend on the nature of the activity being undertaken e.g. fitness levels, water confidence or ability to swim.

Where appropriate additional information to an external provider should include a child's medical condition or dietary requirements.

Medical Consent

This should form part of the parental consent form. Parents should be asked to agree to pupils receiving emergency treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities. If parents do not agree to this, Head teachers may decide to withdraw the child from the visit – given the additional responsibility this would entail for the party leader.

In an emergency a pupil may require medical treatment including surgery, therefore parents must have agreed in advance what action the party leader is to take should such an emergency arise.

For Category A and B visits it is possible to ask parents to confirm that there are no changes to the medical information that the school already holds. However the pupil's medical information is gained it must be readily accessible to the Party Leader and/or accompanying staff at all times during the visit.

Other Consent

Parental consent should be obtained specifically for the transporting of pupils in the private vehicle of a non-teacher adult or another pupil on the visit. Head teachers should consider whether consent should be obtained before pupils can be carried in a teacher's private vehicle.

Early Return

The party leader should tell parents if they will be expected to fund the early return of a pupil whose conduct gives cause for concern on a visit. A written agreement may be necessary.

Pupil Contact with Parents during the Visit

Schools should consider very carefully their policy regarding pupils carrying and using mobile phones.

Parents who are used to being able to contact their children at all times should be reassured that numbers will be available for them to contact in the event an emergency at home.

Head teachers should ensure that parents can contact their child via the school contact and the party leader in the event of a home emergency, and that they have a number to ring for information in the event of an incident during the visit or a late arrival home.

Party leaders can arrange for parents to be told by the school of the group's safe arrival.



One way of doing this is by a 'telephone tree' whereby one parent contacts an agreed group of parents who then contact a further group. But pupils may wish to speak to their parents individually.

Such arrangements should be agreed with parents and pupils before the visit takes place. Parents concerned after a phone call should contact the named member of staff back at school.

Guidelines Section 9

School Journey Insurance

General

It is recommended that all schools, academies, settings and other establishments check carefully their insurance and financial protection arrangements for off-site educational visits and activities to ensure they are clearly understood and they meet the needs of the range of visits and activities undertaken.

The LA employer's liability insurance provides legal liability cover against the risk of injury to employees. The public liability policy provides legal liability cover against the risk of injury to others, including pupils.

As with all insurance, it is dependent on the fact that schools and staff have taken all reasonable precautions in planning and supervision. This underlines the importance of thorough planning processes, as this demonstrates to insurers that the claimant has exercised due care, and reduces the chance of any responsibility being laid at their door.

It is a condition of the LA's insurance policies that educational visits and activities are planned and conducted in accordance with the LA's educational visits guidelines and that approval for the visit has been obtained at the appropriate level prior to the visit taking place

Journey insurance is provided on an annual basis in respect of authorised school journeys and visits away from school premises and is included within the insurance package offered to schools. Individual proposal forms are not required for journeys within the UK.

All authorised visits and trips, including those abroad will be automatically insured under the school journey scheme.

For journeys abroad it will be necessary to contact the LA Insurance Section on: 01226 773239 well in advance of the visit taking place.

It will also be necessary to take out additional cover where the value of equipment or personal effects taken on a journey exceeds the current levels of cover.

Should a school decide to arrange its own school insurance it must also arrange cover for visits and journeys. The Council will be able to provide insurance for those schools upon request.

A copy of the Council's insurance policy has been sent to schools. A replacement copy can be obtained from the Insurance Section.

Parents of pupils should be made aware of the insurance cover, as should any adults accompanying the party.

Alternative cover can be obtained from Tour Organisers, Insurance Brokers or Insurance Companies. However, care must be taken to ascertain the detailed terms and conditions. Before any such arrangements are completed guidance must be sought from the Insurance Section.

Particular attention should be paid to the cover provided by insurance when travelling abroad using budget airlines that are not backed by ABTA or ATOL. Where alternative insurance is arranged this must provide cover, which is at least the equivalent of that provided by the Council.

External Providers

Companies or organisations that provide elements of an educational visit, e.g. transport, activities, or accommodation are bound by law to insure their employees, premises, or vehicles for the use to which they are put.

This means that if circumstances causing, injury or damage arise, they must be insured to cover these if they are a result of their actions (third person liability etc.).

If any form of claim needs to be made by a school party, it should be made through the insurer selected by the school (LA or other) in the first instance. This insurer will then deal with reclaiming or negotiating with that of the external provider.

Use of Private Cars for Visits and Journeys

Teachers and others transporting pupils on journeys in their own private cars are not covered by the LA's school journey insurance. Schools must ensure that if private cars are being used to transport children on journeys that the owner of the vehicle has appropriate insurance cover.

The vehicle owner should check with their insurance provider.

It is also important to check that private car drivers ensure they are not invalidating their insurance through un-roadworthy vehicles, lapsed road fund licence or other means.

This applies equally to private cars being used to transport children outside of school time or on a voluntary basis.

Guidelines Section 10

Planning Transport

General

The party leader must give careful thought to planning transport especially when the transport is by road, since it probably presents the area of highest risk for off-site visits.

With the increased availability of budget air travel, it has become easier to visit distant destinations. Many of the organisational skills used for local visits are transferable for these longer journeys, but inevitably such visits entail more arrangements due to multiple modes of travel involved.

EVCs and Party Leaders should seek as much advice as necessary from available sources such as the travel company, and the LA Outdoor Education Adviser when planning distant venues abroad.

Some of the main factors to consider regarding transport:

- Type of journey – will visit take place locally or will it include long distances?
- The most appropriate method of travel, public transport by road, rail, by boat, plane, hired coach or minibus.
- Passenger safety.
- Arrangements in case of breakdown/emergency.
- Supervision of the group during the journey.
- Appropriate insurance cover.
- Stopping points on long journeys for toilet and refreshments.
- Weather.
- Choice of a reputable and appropriately licensed travel/transport company.
- Legal and regulatory constraints when using school minibuses.
- The competence and training of the driver in the case of a self-hire vehicle and whether the driver holds the appropriate valid licence.
- Number of driving hours required for the journey and length of the driver's day (including non-driving hours).
- Capacity and experience of driver to maintain concentration – whether more than one driver needed to avoid driver fatigue.
- Traffic conditions.

Legislation

Legislation relating to the various forms of transport can be extensive and complex, and it is only feasible to address the most commonly encountered issues in this document. There is more information in the LA's "Guidance for the Safe Use of Minibuses", and the BMBC Driver's Handbook. If further advice is needed, contact BMBC Fleet Services.

For further details about legislation relating to vehicles, consult the DfT and the DVLA websites.

The employer of the staff organising a visit should satisfy themselves that all travel arrangements, including the hire of private coaches or buses, are suitable for the nature of the visit. In practice, head teachers in collaboration with the EVC will normally carry out these checks.

Where a school hires a self-drive vehicle the driver is responsible for the vehicle during the visit, and should be clearly aware of this. Similarly where the coach/bus is provided by a commercial company the driver has responsibility for the vehicle.

Government advice on the law regarding seat belts is available at www.gov.uk/seatbelts-law and from ROSPA at www.rospa.com/road-safety/advice/vehicles/seatbelts-and-airbags.

The seats must face forward and seat restraints must comply with legal requirements.

Supervision on transport

The level of supervision necessary should be considered as part of the risk assessment for the journey. Detailed guidance on supervision and staff to pupil ratios is given earlier in this document.

Use of external transport providers

There is a growing awareness of the environmental and financial benefits of using public transport, or conveying large groups of people together rather than in small numbers by car.

Public Transport is extensively regulated to maximise the safety of passengers, but there are considerations to be balanced against the environmental financial benefits and the personal and social learning from using buses, trains etc. For example, scheduled public buses do not ordinarily have seat belts, nor can you guarantee sufficient seats for the entire group, unless a prior arrangement has been made.

Coach and minibus travel is understandably the favoured means of travel for school groups, for cost effectiveness, and because supervision of a group is made easier by their containment in one vehicle.

Their use over long distances, however, should be carefully considered, given their relative lack of comfort (in comparison perhaps to trains), the amount of time the journey will take (in comparison to flying), and the potential for serious delay on the roads.

Although there are some assumptions that can be made about the safety and consumer standards on publicly available transport, assurances should be sought from independent companies about their policies, procedures and cover in the event of breakdown, cancellation, or ceasing trading between booking and travelling, particularly on foreign or extended visits.

It is likely that groups travelling long distances will use several forms of transport, e.g. coach and ferry combination to reach Europe, or minibus/cars to reach airports.

Consideration must be given to all the components of the journey, not just the major carrier. To ease the burden of these responsibilities schools may often choose to use a travel agent or company that will organise the entire journey.

This comes at an increased financial cost, alternatively, suitably experienced staff may be able to organise these elements of the visit, providing they obtain the relevant guarantees from the companies used.

Hiring coaches and buses

The party leader is responsible for ensuring that coaches and buses are hired from a reputable company. Professional operators of buses and coaches are legally required to be licensed. Schools using operators to transport pupils should ensure that the operators have the appropriate public service vehicle (PSV) operators' license. When booking transport, the party leader should ensure that seat belts are available for pupils. Whilst seat belts must be fitted on coaches that carry groups of children, they are not legally required on buses. Buses where seat belts are not fitted are not normally appropriate for visits involving long journeys.

If any of the party uses a wheelchair the party leader should ensure that transport used has appropriate access and securing facilities. It may be appropriate to use portable ramps. DfT can provide advice.

Transport Provider Accreditation

It is BMBC policy that, wherever possible, CHAS (Contractors Health and Safety Assessment Scheme) approved providers must be used. They must be compliant with the CHAS system for the time of your visit.

It is your responsibility to check your provider is CHAS compliant for the dates of your visit. You can do this by going to the CHAS website at www.chas.gov.uk and logging in through the "Buyers Login" link using the details which have previously been circulated to BMBC supported establishments.

For situations where CHAS approval may not be feasible, e.g. when using tour operators which sub-contract transport arrangements, you must still make every effort to ensure that transport providers being used are suitable. Further detailed guidance on this is provided on the Evolve system on the Transport Company screen by clicking the blue "i" information button.

Licences and Permits

Detailed guidance is provided in the LA's publication "Guidance for the Safe Use of Minibuses".

Transport in the school minibus

Schools using minibuses should refer to the LA's current edition of Guidance on the Safe Use of Minibuses.

Although the chairperson of governors or head teacher is ultimately responsible for the school minibus, the driver is responsible for the vehicle during the visit, and should be aware of this before taking on this responsibility.

The minibus driver must be qualified to drive a minibus and have a valid and clean driving licence – See the LA's current edition of Guidance on the Safe Use of Minibuses.

It is advisable for all those who may drive the school minibus to receive training in minibus driving and the management of passengers.

Those driving a school mini-bus or a self-drive hire mini-bus must recognise that driving an empty bus for practice is very different from driving the vehicle when it is fully laden with pupils and luggage.

Similarly, handling a vehicle can be affected when equipment is stored on a roof rack and/or towing a trailer.

Arrangements need to be made by schools for those staff driving a mini-bus to practice their driving under these conditions before transporting children on the visit.

The Head teacher should ensure that teachers driving school minibuses have a rest period before driving.

The minibus driver must:

- Have undergone the council minibus driver assessment.
- Be familiar with the contents of the Council driver's handbook
- Comply with transport regulations and the requirements of the vehicle's insurance cover. (e.g. check that the minibus complies to legal standards for towing trailers or carrying wheel chair users)
- Not drive when taking medication or undergoing treatment that might affect their ability or judgement.
- Know what to do in an emergency (see appendices for Breakdown/Accident Procedures, and Emergency Procedures).
- Know how to use fire-fighting and first-aid equipment.

- Avoid driving for long periods, ensure that they are in a fit condition to start a journey, and ensure that rests are taken when needed.
- Have regular medical checks e.g. eyesight.

Maintenance and checks of the school minibuses

The governing body will usually be responsible for the minibuses. However, this will be delegated to a member of staff to carry out regular checks and ensure that the minibuses are maintained. The person responsible for maintaining the minibuses should:

- check the vehicle's condition on a weekly basis;
- ensure proper servicing and repairs are carried out by a reputable garage;
- maintain the record-of-use book with the service history, insurance and other relevant documents;
- always be informed before other teachers use the school minibuses;
- ensure that any teachers driving the minibuses are competent and have undertaken suitable training to do so;
- ensure that drivers of the school minibuses are aware that the vehicle should always be logged in and out.

Private Cars

Teachers and others who drive pupils in their own car must ensure their passengers' safety, that the vehicle is roadworthy; and that they have appropriate licence and insurance cover for carrying the pupils. The insurance cover required is insurance for business purposes.

The driver is responsible for making sure that pupils have a seat belt and use it at all times. Vehicles without seat belts must not be used.

Head teachers or party leaders who wish to use parents, volunteers or other pupils to help transport pupils in their own cars, must ensure that they are aware of their legal responsibility for the safety of the pupils in their cars.

Volunteer Drivers

For transporting pupils on extra-curricular activities (e.g. inter-school sports events), schools often rely on the use of private vehicles. In many cases parents offer the use of their own vehicles not only to transport their children but others. Where this is the case the following guidance points must be observed by all schools regarding the transporting of pupils.

Vehicles

The school must assure itself that any private vehicle used for transporting children must:

- (i) be taxed; and
- (ii) have appropriate insurance; and
- (iii) be driven by a person with a valid license.

Parents

This applies to parents of children registered at the school.

- (i) Parents can transport their own children.
- (ii) Parents who volunteer to transport any children, other than their own, on a regular basis, must be DBS checked.
- (iii) The names of parent volunteer drivers approved by the school (and therefore DBS checked) must be made known to other parents as similarly they would inform parents of the transport arrangements for any visit or journey.
- (iv) Parent volunteer drivers who are not DBS checked, must never have sole responsibility for other children who are not their own.
- (v) In an emergency where a parent volunteers for a “one-off” journey, they cannot transport children, other than their own, unless another adult is present who is DBS checked.

Other Adult Drivers

Members of the school staff and governors who have been DBS checked are approved drivers where they meet the requirements under Vehicles above.

Any other person volunteering to transport pupils in their vehicle about whom the school has little or no recent knowledge should adopt the same recruitment measures as it would for paid staff.

Further Advice

Where a school is unsure how to manage a request from a person who wishes to be a volunteer driver they should contact the LA.

Dropping Pupils off ‘En Route’

On occasions in particular when groups are returning home after the end of the school day (this may occur with sporting fixtures and tournaments) pupils may be dropped off at an agreed venue ‘en route’. If this is to be permitted some element of reasoned judgement may have to be exercised by schools and in doing so schools may wish to consider the following factors:

- that parents are fully aware where the pupil will be dropped off and has consented to this;
- the age and capability of the pupils concerned;
- seasonal conditions, weather and time of day;
- the distance of the drop off point to home and whether the route may be hazardous;
- mode of transport i.e. will the pupil be walking or collected by car;

- whether the pupil will be walking alone or with a friend.

Transport Abroad

Staff wanting to organise transport abroad should refer to the earlier section, Types of Visits, where it is dealt with in detail.

Guidelines Section 11

Adventurous Activities

Activities

General information about adventurous activities is given below and also guidance relating to specific disciplines. Even a specific activity may be run at many different levels to suit participants' abilities at many different venues and so guidance should be used alongside advice from the governing bodies for that activity where such guidance exists.

Even where an activity is run in its lowest risk form, there are some common inherent hazards that need considering from the outset, water environments or operating at height.

Activities not mentioned in this list will be those that do not take place regularly. Advice regarding any activity not mentioned should be sought from the Outdoor Education Adviser prior to undertaking it.

School-led Adventure Activities

All the activities listed both on the Evolve visits system www.barnsleyvisits.net as adventure activities and in the staff to pupil ratio table, are classified by the Authority as Adventurous Activities, i.e. would be considered as Category C visits.

If a member of the school staff is to organise, lead and instruct pupils on adventure activities, they should ensure that they have registered their qualifications with the LA's Outdoor Education Adviser (via the Evolve online visits system).

A key role of the EVC is to ensure that people of suitable competence supervise activities. In leading adventure activities, teachers or other school staff will have the great advantage of knowing their pupils well. However, unlike centre instructors, they may not regularly instruct an activity nor be as familiar with the activity site or have ready access to others instructing the same activities on a regular basis. This could affect their awareness of specific risks.

The LA and the school will need to be satisfied that the party leader and other supervisors are competent to act as leaders and/or instructors of pupils in their activity – bearing in mind that some of these pupils may be novices.

In general terms the EVC will need to be satisfied that the following requirements are met:

- the party leader is competent in safety procedures and the planning of adventurous visits;
- an approved risk assessment has been completed;
- the supervision is appropriate;

- there is adequate first aid provision, expertise and equipment within the group;
- the emergency procedures include activity-specific measures and that supervisors are competent to carry them out;
- the equipment is appropriate, safe and in good condition;
- every pupil is suited to the activity and is properly prepared and equipped;
- LA approval for the visit has been submitted and received.

Competencies required for leading adventurous activities

Staff leading adventure activities must register details of their qualifications and/or verified competence in the Awards section of their My Details area of the Evolve online visits system at www.barnsleyvisits.net. **Original copies of certification must be seen by the EVC or the LA's Outdoor Education Adviser** and a note must be added to the system to confirm this.

The LA's Outdoor Education Adviser will refer to this information whenever approval is sought for specific adventure activities.

Only staff whose qualifications have been inspected and recorded in this way will be approved by the LA to lead or instruct parties on adventurous activities.

Means of Verifying Competence

For adventure activities the LA Outdoor Education Adviser will be able to consider the following as evidence of competence:

- National Governing Body (NGB) Awards/Qualifications.
- National Vocational Qualification (NVQ) equivalent of NGB awards.
- Local or in-house validation.
- Site-specific assessments.
- Experience confirmed by assessment in the field.

National Governing Body Awards/Qualifications

Appropriate NGB and other relevant leader/instructor qualifications are listed in the matrices set out in Guidance to the Licensing Authority on the Adventure Activities Licensing Regulations 1996 (see also Qualifications Matrix in the appendices).

Advice about the relevant type of qualification appropriate to specific activities can be sought from the relevant NGB, or from the LA Outdoor Education Adviser.

However, staff wanting to instruct groups would be expected to understand the level that their qualifications allow them to operate at through their specialist training and assessment.

In-House Validation

In-house validations are approval systems that usually have local rather than national relevance. They may be restricted stated environments; they are for employees of the operating organisations (e.g. the LA); they are not automatically transferable to other organisations.

The body responsible for granting the validation would normally be the LA, commercial company or other employer. To ensure the robustness of in-house leader validation arrangements for adventure activities it is vital that these are monitored and recorded by the LA Outdoor Education Adviser or a suitable qualified technical adviser.

Site-Specific Assessment

Site-specific assessment refers to a situation in which an individual is trained to cope with the particular demands of a named location or activity. This assessment will take place on location and will generally be in the charge of the LA Outdoor Education Adviser or a suitable technical adviser for the activity. An example would be the instruction of sessions on a particular high ropes course, which cannot easily be linked to an NGB, but for which potential leading staff can be trained and assessed by a technical adviser.

Some activities that are not considered to be Category C, but raise concerns, such as a water-margin studies visit, should only be led by staff with considerable experience in that environment and with the type of group involved. If the risks involved in the activity are assessed as being relatively low, a site-specific induction may suffice. Advice and training can be sought from The Outdoor Education Adviser.

Experience

Competence in adventure activities derives from a balance of personal experience and related training. Technical competence can be attained through formal training. However safety judgements are most soundly based on enlightened experience which takes time to accumulate.

Proof must therefore exist of suitable and sufficient experience in the activity. This will normally be verified by the LA Outdoor Education Adviser, with the help of a technical adviser where necessary. This may be done by the Outdoor Education Adviser accompanying the group on the activity in question to confirm the necessary experience of the leading staff by discreet observation.

Leaders of such activities requiring LA approval must:

- have demonstrated a level of competence for the activity which can be certified by a recognised National Body;
- hold a current First Aid Certificate as a minimum;
- have recent and relevant experience in the particular activity;

- be conversant with the current LA requirements;
- be aware of all the planning procedures required by his/her establishment;
- carry out all the necessary checks including medical conditions, equipment and weather forecast etc;
- choose activities which are closely related to the age, needs, experiences and aptitudes of the pupils;
- set appropriate supervision and staffing ratios;
- be competent to carry out a comprehensive risk assessment;
- be competent to both monitor and manage the risks throughout an activity and know when to stop an activity;
- be fully conversant with accident and emergency procedures.

First Aid

All leaders who take groups off site should have an up to date working knowledge of first aid and be able to cope with the most common problems.

A first aid kit should be carried on all but the most local journeys and leaders engaged in activities in remote areas where help is not readily available, should possess a first aid qualification.

All leaders should be aware of the agreed accident and emergency procedures.

Note – Leaders of activities that require approval by the LA must ensure that they hold a current first aid certificate which is appropriate to their activity and qualification. Where approval is dependent on the leader holding a National Governing Body Award the leader must continue to possess a valid and appropriate First Aid Qualification. A copy of which should be uploaded to the Awards section on the Evolve online visits system along with their qualifications.

Staffing Ratios for Adventure Activities

As with all forms of group supervision, it is not possible to give precise staffing ratios to cover all situations, but the following general principles should help to arrive at sensible and practical solutions.

Staffing ratios will depend on:

- the nature and location of the activity;
- the age and experience of the group;
- the skill and experience of the staff;
- the duration of the activity;

- the availability of prompt outside assistance;
- the weather conditions.

In all cases of off-site activities the need or desirability of two or more leaders per group will be obvious.

With some water-sports the ratios may be dependent on the powered safety craft available.

Mixed groups should be accompanied by male and female staff, especially when undertaking a residential experience.

The Adventure Activities Licensing Authority (AALA)

The Aim of the Licensing Scheme

[The Adventure Activities Licensing Authority](#) (AALA) was set up to regulate and monitor the provision of adventure activities for under 18 year olds by commercial organisations or individuals.

Holding a licence means that a provider has been inspected and the Licensing Authority are satisfied that appropriate safety measures are in place for the provision of the specified licensed adventure activities. Other elements of the provision – such as catering and accommodation – are not covered by the licensing scheme. These should be checked separately by the party leader.

The aim of the adventure activities licensing scheme is to give assurance that good safety management practice is being followed in respect of outdoor activities whilst not exposing young people to avoidable risk of death or disabling injury.

- Schools do not normally fall into the category of commercial provider and are exempt from the Licensing scheme, except if they provide instruction to pupils from another educational establishment.
- The application of the Adventure Activities Licensing Regulations 1996 is most likely to come to a school's attention when they seek to use an external provider to run activity sessions or courses for its pupils.
- If the activities are school led and the Leader is taking a party from within their own school a license is not required but the Leader will require LA approval and must be assessed as competent by the Outdoor Education Adviser.
- Not all adventurous activities, even those in Category C, require a license when commercial companies provide them.
- Schools must use an AALA registered organisation when the planned activity is licensable
- The organisation's license must also specifically include the chosen activity, and provider asked to verify that they comply with AALA defined staffing requirements.

- The licensing scheme does not cover any activities outside the UK, and schools should make appropriate checks on any provider used abroad, contacting the Outdoor Education Adviser as necessary for advice.

Activities within scope of the scheme

Caving

Caving for the purposes of the licensing scheme covers most activities done underground in natural caves or in mines, including variants described as potholing, cave diving and mine exploration. It does not include visits to the parts of show caves or tourist mines, which are open to the public or to the parts of mines (underground excavations made for the purpose of getting minerals), which are still being worked. A licence would always be needed if rock climbing or diving equipment is required for safe access.

Climbing

Climbing for the purposes of the licensing scheme covers most activities involving movement over difficult terrain which requires the use of hands as well as feet and safety requires either the use of equipment or the skills and techniques of a rock or ice climber. As well as rock climbing and ice climbing it includes variants such as gorge walking, ghyll scrambling and sea level traversing.

Use of climbing walls, abseiling towers and similar manmade structures designed for practising climbing techniques are excluded from licensing but this does not extend to other outdoor manmade structures such as railway viaducts.

Trekking

Trekking for the purposes of the licensing scheme covers walking, pony trekking, mountain biking, or off-piste skiing in remote open country. Travelling in any place which is moorland (open uncultivated land at any height above sea level) or on a mountain above 600m and from which it could take more than 30 minutes travelling time to walk back to an accessible road or refuge is subject to licensing except for on-piste skiing. Journeys by public transport or other mechanised means are not subject to licensing.

Water-sports

Water-sports for the purposes of the licensing scheme covers most activities involving unpowered craft on certain specified waters. The specified waters include any place within the territorial limits of Great Britain on the sea or any other tidal waters, including estuaries, the tidal reaches of rivers, sea lochs and harbours. The term also includes any body of inland water in which it is possible to be more than 50 m from the nearest perimeter bank; and any inland waters where the surface is turbulent because of weirs, rapids, waterfalls or fast flowing currents (white water). Any stretch of inland water, which is categorised at Grade II or above according to the International Canoe Federation classification, would be subject to licensing. The craft subject to licensing, if used on specified waters, are canoes, kayaks or similar craft; rafts (inflatable or improvised); sailing boats, windsurfers, sailing dinghies or other wind-propelled craft.

Details of the Adventure Activities Licensing Authority



Many providers currently hold a licence. The relevant legislation is the Activity Centres (Young Persons' Safety) Act 1995 and the associated Adventure Activities Licensing Regulations 1996.

It is illegal for a provider of licensable status to offer a licensable activity without a valid licence. The Adventure Activities Licensing Service can provide information on the licence status of a provider. Their address is:

Adventure Activities Licensing Service, 17 Lambourne Crescent, Llanishen, Cardiff CF4 5GG,. Telephone 01222 755715, Fax 01222 755757. Their web site is at: www.aals.org.uk. Schools can check the license of providers by going to the AALA web site at www.aals.org.uk and using the Search for a Provider feature.

A licensed provider does not necessarily have to hold a licence for all its activities as many of the activities that pupils take part in will be covered by Health and Safety legislation alone. The provider can give information on what activities are licensed.

Qualifications required for Adventure Activity Providers

Schools who require further clarification on competencies of the staff of external providers should contact the LA Outdoor Education Adviser.

Activity Providers that do not require AALA licenses

Not all providers are required to hold a licence. Voluntary bodies and schools providing for their own members and pupils respectively are exempt.

Commercial bodies and local authorities are also exempt if their activities fall outside the scope of the regulations. Not holding a licence does not imply a lack of safety. It might simply mean the provider or the activity is not licensable.

Examples of such activities are: Water-sports on flat water areas less than 100 metres wide, high ropes course, climbing on artificial structures, and cycling on purpose built trails.

Non-statutory accreditation schemes

Many providers offering activities out of scope of the AALA regulations are accredited under non-statutory schemes. There are a number of quality assurance schemes available at the time of writing.

LOtC Quality Badge

Some adventure activities (such as climbing walls, abseiling towers or zip wires) are out of scope of AALA licensing. Holders of the Learning Outside the Classroom (LOtC) Quality Badge have been inspected against nationally recognised safety and quality criteria.

Adventuremark

Similar to the LOfC Quality Badge and inspected to the same standards, holders of the Adventuremark award have been inspected against nationally recognised safety.



BAPA

Assured members of the British Activity Providers Association (BAPA) comply with externally inspected safety management system procedures and requirements specified by the Association.

NGB Awards

For some activities, National Governing Body (NGB) Awards should be held by instructors supervising adventure activities. For example, Mountain Training England (MTE) manage a range of hill walking and climbing qualifications, the Canoe England manage canoeing and kayaking awards and Archery GB, otherwise referred to as the Grand National Archery Society (GNAS), deliver training and qualifications for archery.

Activity Association Codes of Practice/Guidelines

Where activities are not covered by any of the above schemes, look for a national association with a credible code of practice and guidelines which must be followed by members e.g. the National Karting Association for go-karting.

Seeking Safety and Quality Assurances from Providers

The BMBC Provider Form provides a straightforward to obtain a well thought out set of assurances from adventure activity providers. Schools can send it to the provider, they can complete it and return it. Schools then have a clear contract and specification from them about safety and other relevant issues for the visit.

If schools are proposing to use a non-licensable provider, the group leader should obtain assurances that:

- risks have been assessed and that the provider's staff are competent to instruct and lead pupils of the group's age range on the activity. Competence could be demonstrated by holding the relevant NGB award where it exists or through successful participation in an NGB approved in-house scheme;
- provider's staff have been DBS checked, where necessary;
- the equipment is appropriate and that its safe condition is checked before each use;
- operating procedures conform to the guidelines of the National Governing Body for the activity where this is appropriate;
- clear management of safety systems is in place;
- there is appropriate provision for first aid;

- there are effective emergency procedures, both on activities, and whilst using any transport or accommodation base. These should link with the visiting school's procedures and information, such as emergency contact systems;
- if this information is available electronically, it may not be necessary to demand paper versions of documents.

The party leader may wish to ask the provider for names of other schools who have recently used its facilities.

Activities Outside Category C

There are a number of activities which some may consider as being at the margins of Category C and which raise concerns for those planning to undertake them. Examples include:

- Camping
- Environmental and Field Studies
- Farm Visits
- Orienteering
- Low level walking
- Exploring the coastline
- Other Activities at water margins
- Road cycling

These are commonly used, and very beneficial activities, but at basic levels are not specifically covered by National Governing Bodies and their qualifications.

This means that the competence of the school staff leading these activities depends almost wholly on their personal experience, and Head teachers and EVCs must be able to assess this satisfactorily to approve them as party leaders.

Given the nature of the activities and the environments they take place in, there should be a minimum of two responsible adults with any party and adult to pupil ratios are unlikely to be greater than 1:10.

The Outdoor Education Adviser will assist in this process by organising in-service training courses and accompanying staff on activity sessions to confirm staff competence if necessary.

Information about some of these activities can be gained from some NGBs, but the following notes are provided to give an overview of the issues to be addressed for each. It is intended to advise party leaders on the essential issues of safe practice, irrespective of who provides the instruction.

Camping

Camping takes many different forms and can provide a valuable educational experience. The following points are intended to guide those planning standing camps or lightweight expeditions in low level areas.

Leaders

- Must be competent to both assess and manage the risks associated with the activity.
- Should have previous experience.
- Should have knowledge of the area.
- Should know the location of the nearest emergency services.
- Need to produce a clear set of guidelines with regard to pupil conduct on and around the campsite.
- Need to be aware of their 24 hour responsibility.

Safety

- Practice of camp-craft skills should be undertaken at base in advance of any camp.
- Choice and preparation of the site is of paramount importance.
- Tents should be sited to allow free movement between them and to prevent the risk of fire
- Special care is necessary when using stoves. The storage and handling of fuel should be carefully managed and surplus fuel should not be issued to pupils.
- Sound hygienic practices must be established.
- Care must be taken in the use of tools.

Environmental and field studies

Field studies associated with a range of subjects including geography, biology, geology and history might take pupils to industrial sites and other urban areas as well as into the countryside and to the coast.

Such visits include farm and industrial visits, urban fieldwork, marine biology, ecological studies and geological investigations at sites such as quarries.

The scope of field studies means that the party leaders, who will usually be subject specialists, should also be competent to lead and instruct their pupils within urban and non-urban environments at minimal risk.

Leaders

- Must be competent to both assess and manage the risks associated with the activity.
- In addition to the academic work to be covered, leaders need to be thoroughly familiar with the area or site and to be aware of any potential hazards.
- There may be a need to undertake specific training which will raise awareness of the safety issues connected with working in potentially wild or hazardous environments.
- If the field studies are connected with any adventurous activity such as fell walking, caving, canoeing, sailing or rock climbing, then leaders need to conform to the LA requirements for approved leaders.

Safety

- Specific guidance needs to be given according to the site and location being used.
- Where studies are undertaken near water, extra vigilance must be exercised (see later in this section – Activities at Water Margins).
- Care, and specific training may be needed when using specialist equipment.

Farm Visits

Farm visits can be a valuable educational experience, but farms can be dangerous places even for those people that work on them.

Farm visits present leaders with hazards associated with both farm machinery and e-coli food poisoning, zoonoses, zoonotic diseases and other infections. Taking children to a farm should be carefully planned.

Detailed information can be obtained from both the DfES and [HSE](#) as well as [Defra](#) and [farm related associations](#).

Leaders

- Must be competent to both assess and manage the risks associated with the activity.
- Ensure that there is clear information for visitors on the risks and the precautions to take
- Should be aware of the general arrangements and safety provision appropriate to the style of visit.
- Must carry out necessary risk assessments.
- Ensure eating areas are separate from those where there is contact with animals
- Should ensure an adequate level of supervision at all times.

- Should make a preliminary visit and check that the farm is well managed and has a good reputation for safety standards and animal welfare and that it maintains good washing facilities and clean grounds and public areas.

Safety

- Wear suitable footwear and clothing that is easy to clean.
- Do not place their faces against the animals or put their hands in their own mouths after feeding animals.
- Do not make loud noises or sudden movements that could frighten animals.
- Wash their hands after touching animals and animal droppings and before eating.
- Do not attempt to taste animal foodstuffs or put their hands in their mouths after feeding animals.
- Shoes are cleaned and hands washed on leaving the farm.
- Do not drink from farm taps or animal troughs.
- Do not eat or drink while going around the farm.
- Do not play in the farm area or with farm machinery.
- The Chief Medical Officer's guidance suggests ratios of one adult for eight children for children between ages five and eight.

Orienteering

Orienteering is a navigation and route finding activity that can be adapted to suit any age or ability level. It is a competitive activity that can take place in a variety of environments, but should it take place in wild and remote country, leaders should possess relevant experience and/or qualifications.

Leaders

- Must be competent to both assess and manage the risks associated with the activity.
- Should have previous experience of the activity.
- Will need good organisational and navigation skills.
- The British Orienteering Federation operates an instructor qualification scheme.

Safety

- Introductory activities should take place in school grounds or on well-defined less hazardous areas where access has been approved.

- Courses should be selected to suit ability and experience.
- Controls should be located away from known hazards.
- Emergency procedures should be established.
- The importance of reporting to the finish and handing in control cards must be stressed.
- Beginners should be allowed to work in pairs.
- Clothing should give adequate protection against the weather and should include full arm and leg cover to prevent infection from thorn scratches etc.

Low Level Walking

Walking in the mountains, moorland or remote terrain is adequately covered by MTUK qualifications, but much of the countryside walking with groups goes on in lower or more accessible areas.

One appropriate qualification is the Sportsleader UK Basic Expedition Leader award (BEL award). Alternatively, in-service courses are run by the LA's Outdoor Education Adviser, which lead to the BMBC Countryside Leader Award and MTE now offer their Lowland Leader Award.

The geographical areas that fall into this category are sometimes difficult to objectively describe.

However, the uplands that fall outside this remit are conveniently defined by the recent Countryside Rights of Way Act, both in statute, and on up to date Ordnance Survey maps.

In practice the areas to be used will be easily accessible by road, in case assistance is needed, and although in open countryside, should be on well-marked paths.

Leaders should be aware of the rare incidence of Lyme Disease, which is transmitted by animal ticks. They should know the precautions to take to avoid contact with the ticks, how to remove them, and follow up any illnesses of participants that display associated symptoms.

Leaders

- Must be competent to both assess and manage the risks associated with the activity.
- Should be familiar with the area.
- Should have adequate navigational skills.
- Should have planned the walk in advance.
- Should have the organisational skills to ensure the activity retains the interest of the group (walking is often an acquired 'adult' taste).

- Should carry necessary safety equipment and be prepared to deal with any emergency.

Safety

- Ground rules must be established prior to departure.
- Ensure details of their route are known to a base contact.
- The walk must be within the capability of the group.
- Sources of emergency assistance should be identified.

Swimming in the Sea or in Natural Waters

The advice detailed below is good practice for swimming in natural waters. Activities that involve swimming in the sea or other natural waters should only be undertaken after very careful consideration and planning.

The LA considers this activity as adventurous and within Category C and should be organised accordingly. Advice can be sought from the Outdoor Education Adviser.

Water holds a fascination for most children and safely organised and supervised, paddling or swimming in the sea or other natural waters can be enjoyable and rewarding: it can also be an extremely dangerous activity if safe supervision is not in place.

Swimming and paddling or otherwise entering the waters of a river, canal, sea or lake should never be allowed as an impromptu activity. The pleas of children to be allowed to bathe – because it is hot weather for example or after a kayaking exercise – should be resisted where the bathing has not been prepared for. Natural water activities should take place only when a proper risk assessment has been completed and proper measures put in to control the risks. The activities should be formal and supervised.

For further advice, contact the [Royal Lifesaving Society UK](https://www.rls.org.uk/).

Leaders

- Seek out recognised bathing areas that have official surveillance, i.e. qualified lifeguard cover.
- Hold a relevant life-saving award, especially where lifeguard cover may not be available (or a designated member of staff should).
- Ascertain for themselves the level of the pupils' swimming ability.
- Have checked out the suitability of the venue prior to use with the group
- Check the weather.
- Clearly brief pupils and other supervising adults.

Safety

- Be aware of the local conditions and hazards – such as currents, weeds, rip tides, a shelving, and uneven or unstable bottom.
- Use local information from the lifeguard, coastguard, harbourmaster, and police or tourist information office.
- Look out for warning signs and flags.
- Designate a safe area of water for use by the group.
- Avoid crowded beaches where it is harder to see pupils.
- Be aware of the dangerous effects of sudden immersion in cold water.
- Ensure that buoyancy aids, lifejackets etc., are used where appropriate.
- Pupils should always be in sight and reasonable reach of their supervisors.
- Carry out regular head counts.
- Be aware that it is not always possible to tell when someone is in difficulties.
- Do not eat within half an hour of swimming.
- It is good practice to make effective use of all accompanying adults to supervise the activity. In this case these other adults should:
 - Have clearly defined roles – at least one supervisor should always stay out of the water for better surveillance, even where lifeguards are on duty.
 - Give the children their full, undivided attention.
 - Always follow the advice or directions of the qualified lifeguard.

Swimming Pools

Curricular swimming using pools local to the school and qualified swimming teachers is amply covered by NGB, HSE and other LA guidance, but using a pool as a part of a separate educational visit raises a number of other considerations.

Arrangements for the use of the pool by the group should be unambiguously agreed by both pupils and staff.

There should be no unsupervised use of the pool.

It is also advisable to observe and check the following:-

- is there constant pool supervision by a sufficient number of qualified lifeguards?
- where there is no lifeguard, the group leader should stay at the poolside at a raised location. In such circumstances, the group leader, or a designated

teacher, should have a relevant life saving award and be accompanied by an appropriate number of supervisors.

- is the water temperature appropriate?
- is the water clear?
- are there signs clearly indicating the depth – is there a shallow end and is the water there shallow enough?
- does the pool cater for pupils with disabilities?
- does the deep end allow for safe diving?
- is there a poolside telephone?
- are there a resuscitator and other pieces of first aid and rescue equipment and is there someone trained to use them?
- is there a changing room for each gender?
- does the pool cater for any particular religious or cultural factors?

Exploring the Coastline

The sea has a very great attraction for young people and activities on the seashore and along the cliff tops are therefore very popular for organised school visits.

However, serious accidents and fatalities occur much more frequently around the coastline than as a result of falls in mountain areas.

Leaders

- Must be competent to both assess and manage the risks associated with the activity.
- Must give pupils and staff clear safety instructions and establish a code of conduct.
- Give consideration to recreational time and consider which areas of the terrain are out of bounds
- Should be familiar with the area and the route under similar tidal conditions.
- Should exercise vigilant and effective supervision at all times.

Safety

- Use the local coastguard harbour master, lifeguard or tourist information office to provide information and advice on the nature and location of local hazards.
- Be aware of warning signs and flags

- The direction of the journey must offer maximum security.
- Special attention must be given to coastal erosion, unstable cliffs, and coastal paths.
- The party leader should keep the group a safe distance from the cliff edge or the base of the cliff at all times, creating a buffer zone between the pupils and the hazard.
- A base should be established to which members of the group may return if separated.
- Appropriate clothing and footwear should be worn.
- Details of journey and estimated time of arrival should be left at base.

Other Activities at Water Margins

Many of the significant issues arising from being near to or in water have been covered elsewhere in this document, and the DfE has some useful information for party leaders about all aspects of organising activities at water margins.

There are some additional factors that party leaders should be aware of that could influence the planning of their visit, most specifically, blue-green algae and Weil's Disease.

Blue-green algae inhabit most inland waterways. However, as a result of warmer weather conditions and increased farming nutrients entering inland water, the algae levels have increased abnormally. If the toxins it produces are ingested or absorbed by the skin they can attack the nervous system cause acute liver damage and a skin rash.

The greatest danger is in shallow water where wind or current-driven concentrations of algae have built up. The scum on the water's edge is a particular source of the toxin material.

[The Environment Agency](#) has produced a leaflet on the algae, which outlines common sense precautions.

Weil's Disease (Leptospirosis) is caused by a microbe spread in the urine of infected animals, which may contaminate waterways and bank sides particularly slow moving or stagnant waters. The bacteria do not survive for long in dry conditions or in salt water.

The bacteria can be absorbed via the mucous membranes of the eyes and mouth, but more particularly through cuts and grazes on the skin. It is a serious illness and can be fatal, but does respond to early treatment.

Again there are common sense precautions that can be taken to minimise the risk of infection, and the Canoe England has useful information for water-sports participants.

Many inland waterways may be contaminated with **sewage-based pollution**, at levels that are considered unsafe or bathing. [The Environment Agency](#) and the local

Environmental Health Department are able to give advice on pollution levels in waters.

Whilst any illness is unlikely to be severe, activities liable to lead to immersion, e.g. deliberate capsizes, should be avoided when pollution levels are high.

Road Cycling

Although the activity is one that is regularly undertaken by children and adults alike, there is a whole raft of additional issues that come into being when formally leading a party of children on bikes on the public highway.

As an activity it demands extremely careful planning to choose appropriate routes, equipment etc., and also demands strict supervision standards, as roads present many serious hazards, not all of which are within the control of the participants, e.g. other unpredictable motorised vehicles. Its potential for serious injury should not be underestimated, but properly planned it should be an activity with far-reaching benefits for children that will remain with them as they grow up.

It is recommended that prior experience is gained in a safe off-road environment before taking the group out into traffic, and that adequate time is spent preparing the cycles and equipment as well as relevant personal skills.

There are national safety schemes operated by [Cycling England](#), [CTC](#), as well as local cycling proficiency schemes run locally, sometimes through Barnsley MBC, which would be appropriate resources. These bodies will also give detailed advice about suitable safety equipment, such as helmets and reflective clothing.

Remote Supervision during Adventurous Activities

Some adventurous activities, such as those under the Duke of Edinburgh Awards, require pupils to work in small groups without direct supervision. Particular attention needs to be given to the information provided to pupils before supervision can be withdrawn.

Role of the Technical Adviser

Even though the LA has an Outdoor Education Adviser, there may be occasions where it is necessary or convenient to use an external Technical Adviser to provide training or site-specific assessment, e.g. where a commercial company builds an artificial climbing wall in a school, and provides instructional and maintenance training for the staff to use it.

The OEA should be consulted for advice in the choice of an external Technical Adviser, and must be informed where they have been used so that it can be confirmed staff have had their qualifications and/or evidence of competence inspected and verified and that it has been added to the Evolve system.

Technical advisers have a high level of competence in a particular activity. They will be able to make judgements about the technical and supervisory competence of others within their area of expertise in relation to a particular pupil group. Typically they will have a record as a trainer and assessor of the activity, and hold the relevant NGB award. For adventure activities that would be licensable (if they were not

school-led), technical advisors should be qualified to the level recognised as satisfactory by the Adventure Activities Licensing Regulations 1996).

A technical adviser should give guidance only on activities within their own level of competence.

The LA Outdoor Education Adviser, in assessing the competence of an individual to lead a particular activity, may also seek the guidance of a technical adviser.

Activities with the Armed Forces

A number of activities are available through the Army Recruiting and Youth Teams. Some of these are adventurous activities such as those in the list earlier in this section, but often they are those specific to the army, used to demonstrate to potential recruits what they may encounter if they enlist.

As the Army operates under the Crown they are exempt from other forms of regulation and guidance. However, many recruiting teams, who have regular contact with school groups have adopted the same civilian NGB Awards as the basis for any work with non-Army personnel.

Their recruitment courses, exhibitions, and adventure courses are being continually monitored and there should be no reason for pupils of suitable disposition not to take part.

It is crucial that schools use the information supplied by the organising Army team to ensure that pupils, parents and school staff are clear about the nature, conditions, and content of the course the pupils are taking part in. They are not designed as educational/leisure activities, but as a realistic, but suitably adapted reflection of Army life.

Schools wishing to send pupils to undertake activities with the Army, Navy or Air Force should in the first instance seek advice from the LA's Outdoor Education Adviser.

Other Activities

Schools wishing to participate in an activity which may be regarded as hazardous, but which has not been included in this document, must seek advice from the Education Visits Co-ordinator, who can consult with the Outdoor Education Adviser.

This category also includes activities that fall outside the scope of licensing or are less commonly pursued by pupil groups, such as motor sports, whose safe supervision requires that the leader should normally complete some prior test of specific competence.

Guidelines Section 12

Emergency Procedures

General

Those in charge of children and young people during a visit have a duty of care to make sure that they are safe and healthy. They also have a common law duty to act as a reasonably prudent parent would. Teachers should not hesitate to act in an emergency and to take life-saving action in an extreme situation.

Emergency procedures are an essential part of planning a school visit. Prior to embarking on any school visit the Governing Body and Head teacher must ensure that the school has a suitable policy for dealing with an emergency situation.

If an emergency occurs it is essential that every person supervising the visit understands their respective role in the emergency and is able to effectively put the policy into action.

An emergency can include any untoward occurrence that has a significant effect upon the visit. It could include the breakdown of transport, a serious or fatal accident, the onset of ill health amongst the pupils and supervisors, a fire occurring to the party's overnight accommodation, flooding to a campsite etc.

The school and organising staff should ensure there is a contingency plan (plan B), covering for example, the implications of staff illness and the need to change routes or activities during the visit or any delays including a late return home. If these contingency plans affect the arrangements with parents they should be included on the consent form.

All persons on the visit must be informed about the emergency procedures to follow, and that should the leader and nominated deputies not be able to take charge, emergency services be contacted.

The school must identify who will be the school contact person for the duration of every off site visit. This person will need to have copies of the list of names and addresses for everyone undertaking the visit – pupils and adults, as well as the contact numbers for the Head teacher, Chair of Governors, and LA on-call officer.

If an accident happens, the priorities are to:

- Assess the situation;
- Safeguard the uninjured members of the group;
- Attend to the casualty
- Inform the emergency services and everyone who needs to know of the incident

A detailed Immediate Action Plan is provided in the appendices. This can be copied onto bright coloured paper and laminated, so that it can be carried by the party leader and any other appropriate accompanying adults.

Who Will Take Charge in an Emergency?

The party leader would usually take charge in an emergency and would implement the Immediate Action Plan.

If the party leader is incapacitated, the role should be taken over by an agreed deputy, and other adults should be fully aware of their roles.

In the case of a genuine emergency, the person in charge will:

- safeguard the members of the party;
- provide medical care and rescue where necessary, calling on emergency services as appropriate;
- contact the LA's On-Call Officer. They are available 24 hours a day, all year. This will ensure that on-call officers and Corporate Emergency Planning Officers can support the party and the school in the most effective way.

If the situation is not serious enough to warrant alerting and convening the LA's on-call system, (e.g. a hospital visit for a child which does not require treatment), then it can be dealt with by the School Base Contact, and/or Head teacher

Definition of an Emergency for Which the LA Must Be Contacted

- An accident leading to a fatality, major injury, multiple hospitalisation or life-threatening injury to an individual.
- Illness to any of the party, requiring the call out of medical assistance, or leading to serious disruption of the trip.
- Circumstances where any party member might be at serious risk of harm, e.g. child protection issues, missing children.
- Situations where the media may become involved.

If there is any doubt, however, of the seriousness of the occurrence, then the On-Call Officer should be contacted for advice.

The Children's Services and Corporate Emergency Planning Teams have an agreed protocol and support system in place that will enable them to co-ordinate and organise elements such as transport, insurance, the media, and liaison with school and parents during an emergency.

The School, in turn, must have an emergency plan in place that would allow them to open the school, accommodate parents, etc.

Planning to Deal With an Emergency

By their nature, emergencies are usually unexpected. But carefully emergency planning can mitigate the trauma of being caught up in an emergency. It is good practice for the party leader to:

- have to have accurate risk assessments and all relevant documentations;
- agree an emergency action plan, which includes 24hour (i.e. constant cover) contact;
- ensure that all members of the group know what action to take if there is a problem;
- ensure that any member of staff has power to stop an activity;
- hold evening briefings with supervisors to discuss issues for the next day;
- spend time early the next morning explaining arrangements to the pupils;
- to have the means available to communicate with deputies, the emergency services and the school;
- have, or ensure that other adults in the group have, up-to date competence in first aid and other life saving competence as necessary for the activities;
- ensure that the first aid kit is properly stocked and accessible;
- ensure that all pupils' medical needs (e.g. asthma, diabetes, anaphylaxis) are known and that staff are competent to handle them;
- be aware that some diseases are more common in some countries and know what preventative action to take and what to do if a group member becomes infected;
- recognise that many of the health problems of pupils on longer visits are caused by lack of food, of liquid or of sleep;
- if appropriate, advise group members about the dangers of over-exertion in the heat and of dehydration, which can cause headache, dizziness and nausea;
- in warm climates, keep fluid levels high, take extra salt and wear loose, lightweight clothing – preferable made of cotton or other natural fibres – and use suitable factored sun protection creams and sun hats/glasses;
- ensure that drivers take adequate rest breaks on long journeys;
- ensure that all pupils understand and follow the code of conduct;
- practice emergency drills e.g. evacuation of mini-bus;
- test the policy and procedures to follow in the event of an emergency and remove any deficiencies.

If an emergency occurs the following must be incorporated into the Immediate Action Plan:

- Establish the nature and extent of the emergency as quickly as possible.

- Ensure that all the group are safe, looked after and all members are accounted for.
- Obtain the help of the relevant emergency services.
- Establish the names of any casualties and get immediate medical attention for them.
- Ensure that all group members who need to know are aware of the incident and that all group members are following the emergency procedures.
- Ensure that a teacher accompanies casualties to hospital and that the rest of the group are adequately supervised at all times and kept together.
- Notify the British Embassy/consulate if an emergency occurs abroad.

Inform the Children's Services On-Call Officer. This number should be accessible at all times during the visit:

01226 787080 (or 01226 296800)

- Details of the incident to pass on to the On-Call Officer should include: nature, date and time of incident; location of incident; names of others involved so that patients can be reassured; action taken so far; action yet to be taken (and by whom).
- Notify insurers, especially if medical assistance is required (this may be done by the Emergency Planning Team).
- Notify the provider/tour operator (this may be done by the Emergency Planning Team).
- Ascertain telephone numbers for future calls. Mobile phones may be subject to technical difficulties and should not replace usual communication procedures where possible.
- Write down accurately and as soon as possible all relevant facts and witness details and preserve any vital evidence;
- Complete an accident report form as soon as possible. (A supply of accident reporting forms must be taken on residential visits).
- No-one in the group should speak to the media. Names of those involved in the incident should not be given to the media as this could cause distress to their families. Media enquiries should be referred to the Council Press Officer;
- No-one in the group should discuss legal liability with other parties;
- Keep receipts for any expenses incurred – insurers will require these.

Emergency Procedures Framework for School Base

- Prior to the visit, the name and school and home telephone numbers of a school contact should be identified. It is advisable to arrange a second school contact as a reserve. Head teachers and party leaders should bear in mind that the contact lines may become busy in the event of an incident and that alternative numbers to ring would be useful.
- Modern communication systems mean it is very likely that parents will be aware that a problem has occurred with the visit as early as the school base contact.
- It is important to maintain a reassuring approach with anxious parents, whilst waiting for the assistance and up to date information the Emergency planning team will provide.
- In the event of a serious incident, parents are also understandably likely to gather at the school, and their emergency plan should include access to key-holders, caretakers, and providing a suitable facilities and possibly refreshments for large numbers of people.
- The Head teacher or representative for the school should obtain the basic known facts about the incident from the Emergency Planning Team as soon as possible, and take advice on the information to be made public.
- In the case of a serious incident a representative of the LA is likely to come to the school to offer support as soon as possible.
- Details of parents' contact numbers need to be available at all times while the group is on the visit. The school contact may be asked to act as a link between the group and parents. Parents should be kept as well informed as possible at all stages of the emergency.
- The school representative/Head teacher will be advised by the Emergency Planning Team about further steps to be taken and be kept abreast of any developments, including any statements to be made to the media.
- It is inevitable that the media will become involved in the event of a serious accident which may be very soon after the incident has occurred and may well be before parents and next of kin are informed. The name of any casualty should not be given to the media. Relatives must always be informed of any accident prior to releasing details to the media.

Accident Reporting

All accidents must be reported using the following forms:

HS2(NE) Report of Accident to Non-Employee

HS2(E) Report of Accident to employee

HS2(P) Report of Accident to a Pupil

It is recommended that a supply of each be taken by the party leader.

Some incidents are reportable under the reporting of injuries, diseases and dangerous occurrences regulations 1995 (RIDDOR), which will be done by the Corporate Health, Safety and Emergency Resilience Unit as soon as they have all the facts.

Violence to Staff

All incidents of violence to employees or adults accompanying a group of pupils should be reported using the Form HS2(V)

It should be remembered that the reporting of an incident that does not constitute a full emergency (a 'near miss') may make alert someone else to a potential problem, and avert the possibility of it happening at all.

Reporting of Near Misses

It should be remembered that the reporting of an incident that does not constitute a full emergency (a near miss) may alert someone else to a potential problem and avert the possibility of it happening at all.

A form is provided in the appendices to report such incidents to the LA.

Children's Services Emergency Plan

In order for the LA to respond to a serious accident/incident the following instruction must be followed.

For all three categories of visits and journeys (A and B school approved and C Local Authority approved) the party leader MUST telephone the Emergency On-Call number for any incident set out above in the section called Emergency Procedures in the box headed Definition of an Emergency for Which the LA Must Be Contacted.

Emergencies Abroad

When telephoning from abroad, the Emergency On-Call number is:

+44 (0)1226 787080 (or +44 (0)1226 296800)

ANNEXES

ANNEXE 1

QUICK REFERENCE GUIDE FOR ORGANISING EDUCATIONAL VISITS

Barnsley Metropolitan Borough Council

Children's Services

QUICK REFERENCE GUIDE FOR ORGANISING EDUCATIONAL VISITS

- *The accompanying chart outlines the major processes involved in organising a visit*
- Any off-site visit needs some form of upward approval
- Each school should have an Educational Visits Co-ordinator, who will be able to check that the planning of visits has met the essential criteria before it goes forward for approval
- The Outdoor Education Adviser will be able to give advice for the planning of residential & adventurous activities
- External providers running adventurous activities may need to be AALA licensed
- Approval forms for Category C visits on the Evolve online visits system www.barnsleyvisits.net need to go to the LA at least 4 term-time weeks prior to trip to ensure processing
- Any significant foreseeable risks associated with a visit need assessing & significant findings need recording
- The Visit Planning Checklist provided on the Evolve system www.barnsleyvisits.net should be used for all Category B and C visits.
- Those approving visits should understand their responsibility for assessing the competence of the accompanying staff
- Party Leaders & accompanying staff should be fully aware of the emergency procedures & information they should hold

These sheets do not contain all the information you need to know.

YOU WILL NEED ALSO TO READ THE “ORGANISING VISITS & JOURNEYS” STANDARDS & GUIDANCE DOCUMENTS

QUICK REFERENCE GUIDE FOR ORGANISING EDUCATIONAL VISITS

1	2	3		4	5	6	7	8
IDENTIFY TYPE OF VISIT & TARGET GROUP	CONSULT EDUC. VISITS & JOURNEYS GUIDANCE	IS THE TRIP -		EXAMPLE	CATEGORY	CONSENT	TASKS -ALL	APPROVAL
		LARGELY IN SCHOOL TIME?	CURRICULAR	Survey of local shops	A	NO SPECIFIC CONSENT NEEDED	ASSESS ANY RISKS; MEET STAFFING NEEDS; ARRANGE FINANCES; ARRANGE FINANCES; ORGANISE TRANSPORT FINALISE ITINERARY	THROUGH HEAD TEACHER or MANAGER
			OUTSIDE CURRICULUM	Visit to theme park	B	PARENTS/ CARERS NEED TO RECEIVE DETAILS OF THE VISIT & GIVE SPECIFIC CONSENT. MEDICAL DETAILS OF PUPILS UPDATED & CARRIED BY PARTY LEADER		Evolve system & HEAD TEACHER
			SPECIALIST ADVENTUROUS ACTIVITIES	Rock climbing	C			Evolve system, HEAD TEACHER & LA
		OUT OF SCHOOL HOURS?	ABROAD	French World War Sites	C			Evolve system, HEAD TEACHER & LA
			RESIDENTIAL	Field study centre	C			Evolve system, HEAD TEACHER & LA
			SPECIALIST ADVENTUROUS ACTIVITIES	Outdoor education course	C			Evolve system, HEAD TEACHER & LA
			NON ADVENTURE ACTIVITIES	All day sports tournament	B			Evolve system & HEAD TEACHER

ANNEXE 2

APPLICATION TO THE HEAD TEACHER TO APPROVE A SCHOOL VISIT (SM16A)

BARNSELY METROPOLITAN BOROUGH COUNCIL EDUCATION SERVICES

FORM SM16 (A)

APPLICATION TO THE HEAD TEACHER TO APPROVE A SCHOOL VISIT

This Form may be used for category A visits if required (optional)
Complete all sections of this form.

Section 1 – Details of Visit

School: _____

Educational Visits Co-ordinator _____

Party Leader: _____

Place(s) to be Visited: _____

Date: _____

Time: From: _____ To: _____

SECTION 2 – Emergency Contact

Emergency contact name at the school: _____

Telephone during school hours: _____ Out of school hours _____

Mobile phone number of the Party Leader: _____

SECTION 3 – Adults/Children Participating

Adults in the party	Teachers	M	F	TAs	M	F
		<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>
	Parents	<input type="text"/>	<input type="text"/>	Governors	<input type="text"/>	<input type="text"/>
	TOTAL	<input type="text"/>	<input type="text"/>	Others	<input type="text"/>	<input type="text"/>

Details of children:

Primary	NURSERY		REC		Y1		Y2		Y3		Y4		Y5		Y6		TOTAL	
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F

Secondary

Y7		Y8		Y9		Y10		Y11		Y12		Y13		TOTAL	
M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F

SECTION 4 – Travel Arrangements

Details of Transport (Name of company and telephone number, stations used etc.)

By coach: _____

By self-drive minibus: _____

By train, ferry, or other: _____

SECTION 5 – Medical Needs

If there are any pupils with special medical needs or educational needs in the party will arrangements be made for their care, which have been agreed between the parents and the adults in the party?

Not Applicable

YES

SECTION 6 – Insurance

Insurance cover will be provided by

(i) The Authority

(ii) Tour Operator

(iii) Other

If cover is not provided by the Authority, please attach a copy of the insurance policy form from the insurer.

SECTION 7 – Activities to be undertaken

If the school is undertaking non-specialist activities, please list

Who has checked staff competence and/or qualifications for running these activities?

Name:

Position:

SECTION 8 – Reason for the visit

Educational objective of the visit is:

SECTION 9 – Charges being made

Are any charges being made or voluntary contributions requested from parents in accordance with the School's Charging and Remissions Policy? If yes, please provide details.

SECTION 10 – Confirmation of Arrangements

I confirm that I have read the current edition of BMBC's – ORGANISING VISITS AND JOURNEYS and all the aspects of this journey and activities meet the requirements as set out in that document including my responsibilities.

Signed: _____ Date: _____
(Party Leader)

Signed: _____ Date: _____
(EVC)

SECTION 11 – School Approval

I have discussed the details of this proposed visit with the Party Leader and the EVC and I am satisfied that all the arrangements comply with the requirements of the LA's current edition of: Organising Visits and Journeys; and subsequent amendments.

Signed _____ Date _____
Head teacher

SECTION 12 – Governing Body Approval (if required by school policy)

Approval to undertake the visit is given by

_____ or _____
Chairperson of the Governing Body following Date
Governors' approval

_____ or _____
Chairperson of the Governing Body under Date
emergency action

_____ Date
Chairperson of the relevant Committee

ANNEXE 3

APPLICATION TO THE HEAD TEACHER AND GOVERNORS TO APPROVE SPORTS FIXTURES

BARNSELY METROPOLITAN BOROUGH COUNCIL CHILDREN'S SERVICES

FORM SM16 (C)

APPLICATION TO THE HEAD TEACHER AND GOVERNORS TO APPROVE SPORTS FIXTURES

This form may be completed for a number of Sports Fixtures

Fixture Activity	Year Group	Signatures of Party Leaders
Football		
Rugby		
Hockey		
Netball		
Rounders		
Athletics		
Tennis		
Basketball		
Gymnastics		
Dance		
Volleyball		
Cross Country		

Identification of Risks

Risk Assessments have been undertaken for the sporting fixtures as detailed above

Responsible Adult to Pupil Ratio

These are a guide to the MAXIMUM ratios. Schools need to exercise some reasoned judgement taking into account the age and ability of the group and the nature of the activity see Guidelines Section 5 page 1

Age Group	Key Stage 2	Key Stage 3&4 and 6th Form
Ratio	1:15	1:20

It is strongly recommended that a minimum of 2 responsible adults supervise any visits.

Transport Arrangements – (Please Tick)

Coach		Minibus		Private Vehicle		Public Transport		Other	
-------	--	---------	--	-----------------	--	------------------	--	-------	--

Have parental consent forms been completed? ☐ Yes ☐ No

If there are pupils with special needs have arrangements for their care been agreed? ☐ Yes ☐ No

If no to the above two questions please provide further details on an attached sheet

DECLARATIONS

I confirm that the proposed activity complies with the current edition of BMBC's **ORGANISING VISITS AND JOURNEYS**. The relevant sections have been read by organising staff prior to submitting this proposal.

Signed:..... **Educational Visits Co-ordinator** **Date**.....

I have discussed the detail of this proposal with the party leaders and confirm that all aspects of this proposal meet the requirements as set out in BMBC's current edition of **ORGANISING VISITS AND JOURNEYS**

The proposal was/will be submitted for Governing Body approval on:
Date.....

Signed:..... Head teacher
Date.....

Signed..... Chairperson of Governing Body **Date**.....

ANNEXE 4

PARENTAL CONSENT FOR ROUTINE VISITS AND JOURNEYS

**BARNSELEY METROPOLITAN BOROUGH COUNCIL
CHILDREN'S SERVICES**

ANNUAL CONSENT FORM – ROUTINE VISITS & JOURNEYS

Name of School:

PART A To be retained by the parent or guardian

Throughout the year the school organises a number of routine visits and journeys away from the school site as part of the children's learning experiences. Such visits take place during the school session times and tend to be local within the Barnsley area.

Visits and journeys during the school day are an extension to their classroom activities and present no additional significant risks to the health and safety of the pupils.

All visits and journeys away from the school site must be approved by the head teacher.

The purpose of this consent form is to enable parents/guardians of children at the school to give their permission for their child to participate in visits and journeys away from the school during the school day.

This consent will allow your child to leave the school site for a local visit on several occasions without having to sign a separate consent form for each visit.

Examples of such visits are:

School to list here

ANNUAL CONSENT FORM

PART B To be returned to the school

Name of the pupil

If there are any particular activities you would not want your child to participate in please state below

I have read PART A of this form and understand that I am only giving my consent to allow my child to participate in routine visits and journeys which take place during school session times as an extension of their curriculum activities.

I understand that all such visits and journeys have been risk assessed, have been approved by the Head teacher and follow the Local Authority's guidance.

Signed _____ Date _____
Parent/Guardian

ANNEXE 5

ANNUAL CONSENT FORM – ROUTINE SPORTING FIXTURES AND CURRICULUM ACTIVITIES

BARNSELEY METROPOLITAN BOROUGH COUNCIL

CHILDREN'S SERVICES

ANNUAL CONSENT FORM – ROUTINE SPORTING FIXTURES AND CURRICULUM ACTIVITIES

Name of School:

PART A To be retained by the parent or guardian

During the coming year your son/daughter may have the opportunity to take part in after school curricular/sporting activities some of which may involve competitions against other schools. Such activities will probably involve travelling to another school.

Such activities are always approved by the Head teacher and present no significant risk to the health and safety of the pupils and follow the Local Authority's guidance.

Where activities are undertaken after school full details will be given to the individual pupils involved prior to the event or fixture, usually verbally by the lead teacher. This will include information relating to where pupils will be going, the activity/sport undertaken, what they will need and the expected time back at school.

The purpose of this consent form is to enable parents/guardians to give their permission for their son/daughter to participate throughout the school year without the school having to seek consent for every time the child takes part in an activity.

ANNUAL CONSENT FORM – SPORTING FIXTURES AND CURRICULUM ACTIVITIES

PART B To be returned to the school

Name of the pupil

If there are any particular activities you would not want your child to participate in please state below

I have read PART A of this form and understand that I am only giving my consent to allow my child to participate in sporting fixtures and after school activities.

I understand that all such activities have been risk assessed, have been approved by the Head teacher and follow the Local Authority's guidance.

Signed _____ Date _____
Parent/Guardian

ANNEXE 6

**PARENT/GUARDIAN'S CONSENT FORM FOR A PUPIL
TO UNDERTAKE AN AUTHORISED VISIT/JOURNEY
ORGANISED BY THE SCHOOL (CATEGORY C VISIT)**

EDUCATION SERVICES

**PARENT/GUARDIAN'S CONSENT FORM FOR A PUPIL TO UNDERTAKE AN
AUTHORISED VISIT/JOURNEY ORGANISED BY THE SCHOOL
(CATEGORY C VISIT)**

SECTION 1 – DETAILS OF VISIT/JOURNEY

School:	_____		
Visit/Journey to:	_____		
Departure Date:	_____	Time:	_____
Return Date:	_____	Time:	_____
Activities to be undertaken:	_____ _____		
Party Leader:	_____		
Education Visits Coordinator:	_____		

SECTION 2 – PUPIL DETAILS

Name of Pupil: _____			
Male	<input type="checkbox"/>	Female	<input type="checkbox"/>
1.	Does your child require emergency medical treatment for an allergy or other condition?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	If yes:		
2.	Is there a health-care plan in place at school?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2.	Have you agreed for the adults accompanying your child to administer that treatment?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3.	Does your child require any ongoing medication?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
	If yes:		
4.	Have you agreed the arrangements with the Party Leader?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

5.	Has your child or any member of your family suffered a contagious or infectious disease within the last 3 months?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
6.	Has your child been in contact with any other person with a contagious or infectious disease?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
7.	Is your child allergic to any medication?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If the response to any of the questions 1-7 is Yes, please give details

8.	Has your child received a tetanus injection in the past 2 years?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
9.	Does your child suffer from travel sickness?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
10.	Does your child have incontinence problems?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
11.	Does your child have any special dietary requirements?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
12.	Does your child suffer from any psychiatric illnesses	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If yes, please give details: _____

SECTION 3 – OTHER RELEVANT DETAILS

1.	Is your child able to swim?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
2.	Are there any activities you do not wish your child to participate in?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If yes please state: _____

3.	Is your child allergic to self adhesive dressings (Elastoplast etc)?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
4.	Is there any other medical information about which we should be aware?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If yes please state: _____

SECTION 4 – YOUR DETAILS

Name _____	Relationship to pupil _____
Home Address: _____	
Telephone No (Home): _____	(Work): _____
If I was not available in an emergency please contact:	
Name: _____	Telephone No: _____
Address: _____ _____	
Name of Family Doctor: _____	Telephone Number: _____
Address: _____ _____	

SECTION 5 - DECLARATION

I agree to _____ (Name)		
Taking part in the above activity and having read the information sheet provided agree to his/he participation in the activities described (with the exception of anything mentioned in Section 3 Question 2).I acknowledge the need for obedience and responsible behaviour on his/her part and I am aware of the procedure for returning pupils home prior to the end of the visit where their behaviour endangers the Health and Safety of other pupils. I agree to my son/daughter receiving emergency medical surgical and dental treatment, including anaesthetic, and blood transfusions that may be considered necessary by the medical authorities present. NOTE: If there are any exceptions to your child receiving medical treatment please supply an accompanying letter stating what those exceptions are.I understand the school's policy on the administration of medicines.		
I undertake to inform the school as soon as possible of any change in the medical circumstances between the date of signing and the commencement of the journey.		
I understand that the details disclosed could be passed on to the organiser's insurer and/or medical adviser if necessary.		
A copy of the insurance cover provided for this visit is available on request.		
Signed:	Date:	(Parent/Guardian)

ANNEXE 7

**PARENT/GUARDIAN'S CONSENT FORM FOR A PUPIL
TO UNDERTAKE AN AUTHORISED VISIT/JOURNEY
ORGANISED BY THE SCHOOL – CATEGORY A OR B VISIT**

BARNSELEY METROPOLITAN BOROUGH COUNCIL CHILDREN'S SERVICES

PARENT/GUARDIAN'S CONSENT FORM FOR A PUPIL TO UNDERTAKE AN AUTHORISED VISIT/JOURNEY ORGANISED BY THE SCHOOL – Category A or B visit

NOT TO BE USED FOR CATEGORY C VISITS

SECTION 1 – DETAILS OF VISIT/JOURNEY

School: _____
Visit/Journey to: _____
Date: _____ Times: _____
Activities to be undertaken: _____ _____
Party Leader: _____

SECTION 2 – PUPIL DETAILS

Name of Pupil: _____	
Male <input type="checkbox"/>	Female <input type="checkbox"/>

SECTION 3 – OTHER RELEVANT DETAILS

5.	Is your child able to swim?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
6.	Are there any activities you do not Wish your child to participate in?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If yes please state: _____ _____			
7.	Are there any changes in the medical information we currently hold about which we should be aware?	<input type="checkbox"/>	<input type="checkbox"/>
If yes please state: _____ _____			

SECTION 4 – YOUR DETAILS

Name _____	Relationship to pupil _____
Home Address: _____	
Telephone No (Home): _____	(Work): _____
If I was not available in an emergency please contact:	
Name: _____	Telephone No: _____
Address: _____	

Name of Family Doctor: _____	Telephone Number _____
Address _____	

SECTION 5 - DECLARATION

I agree to	(Name)	
Taking part in the above activity and having read the information sheet provided agree to his/he participation in the activities described (with the exception of anything mentioned in Section 3 Question 2).I acknowledge the need for obedience and responsible behaviour on his/her part and I am aware of the procedure for returning pupils home prior to the end of the visit where their behaviour endangers the Health and Safety of other pupils. I agree to my son/daughter receiving emergency medical surgical and dental treatment, including anaesthetic, and blood transfusions that may be considered necessary by the medical authorities present. NOTE: If there are any exceptions to your child receiving medical treatment please supply an accompanying letter stating what those exceptions are.I understand the school's policy on the administration of medicines.		
I undertake to inform the school as soon as possible of any change in the medical circumstances between the date of signing and the commencement of the journey.		
I understand that the details disclosed could be passed on to the organiser's insurer and/or medical adviser if necessary.		
A copy of the insurance cover provided for this visit is available on request.		
Signed:	Date:	(Parent/Guardian)

ANNEXE 8

CONSENT FORM FOR SWIMMING ACTIVITIES OR ACTIVITIES WHERE BEING ABLE TO SWIM IS ESSENTIAL

PARENTAL CONSENT FORM FOR SWIMMING ACTIVITIES OR ACTIVITIES WHERE BEING ABLE TO SWIM IS ESSENTIAL

Consent does not remove the need for Party Leaders to ascertain for themselves the level of the pupil's swimming ability.

Swimming Ability

- Is your child able to swim 50 metres? YES/NO
- Is your child water confident in the pool? YES/NO
- Is your child confident in the sea or in open inland water? YES/NO
- Is your child safety conscious in water? YES/NO

1. I would like _____ (Name) to take part in the specified visit and having read the information provided agree to him/her taking part in the activities described.
2. I consent to any emergency medical treatment required by my child during the course of the visit
3. I confirm that my child is in good health and I consider him/her fit to participate.

Signed: _____ Date: _____

Full name of parent/guardian: _____

Telephone numbers:

Home: _____ Work: _____

My home address is:

Name, address and telephone number of family doctor: _____

THIS FORM AND A COPY SHOULD BE TAKEN BY THE PARTY LEADER ON THE VISIT. A COPY SHOULD BE RETAINED BY THE SCHOOL CONTACT

ANNEXE 9

PLANNING CHECKLIST FOR APPROVAL OF SM16A FORM

PLANNING CHECKLIST FOR FORM SM16 (A)

TO BE COMPLETED PRIOR TO APPROVAL

Please tick appropriate box		<i>Achieved</i>	Not Applicable
1.	Familiar with the Authority's current guidance on Organising Visits and Journeys	<input type="checkbox"/>	<input type="checkbox"/>
2.	Does the visit meet the educational objectives for the age and abilities of the group?	<input type="checkbox"/>	<input type="checkbox"/>
3.	Party Leader and deputy Leader decided	<input type="checkbox"/>	<input type="checkbox"/>
4.	Party Leader/Deputy leader competencies checked and staff training needs addressed	<input type="checkbox"/>	<input type="checkbox"/>
5.	Visit agreed by EVC and Head teacher	<input type="checkbox"/>	<input type="checkbox"/>
6.	Pupil/Teacher ratio checked	<input type="checkbox"/>	<input type="checkbox"/>
7.	Confirm activities fall into Category A	<input type="checkbox"/>	<input type="checkbox"/>
9.	If Activity Provider being used;	<input type="checkbox"/>	<input type="checkbox"/>
	Insurance checked	<input type="checkbox"/>	<input type="checkbox"/>
	Staff competencies checked	<input type="checkbox"/>	<input type="checkbox"/>
	Health and Safety policy in place	<input type="checkbox"/>	<input type="checkbox"/>
	Risk Assessments in place	<input type="checkbox"/>	<input type="checkbox"/>
	Staff DBS checked	<input type="checkbox"/>	<input type="checkbox"/>
10.	Preliminary visits undertaken or references requested and verified	<input type="checkbox"/>	<input type="checkbox"/>
11.	Relevant Risk Assessments completed and Control Measures put in place	<input type="checkbox"/>	<input type="checkbox"/>
12.	Appropriate First Aid arrangements have been made	<input type="checkbox"/>	<input type="checkbox"/>
13.	If swimming is involved, has consideration been given to pupils' abilities, the location competent supervision & parental consent.	<input type="checkbox"/>	<input type="checkbox"/>
14.	Transport arrangements made, PSV operators licence checked if appropriate	<input type="checkbox"/>	<input type="checkbox"/>
15.	Insurance arranged	<input type="checkbox"/>	<input type="checkbox"/>
16.	Check suitability of participants to activity i.e. physical fitness, special needs, psychological Condition	<input type="checkbox"/>	<input type="checkbox"/>

- | | | | |
|-----|---|--------------------------|--------------------------|
| 17. | Cross reference special needs identified from consent forms with care plans, medicines administering procedures, etc. | <input type="checkbox"/> | <input type="checkbox"/> |
| 18. | Information to pupils and parents | <input type="checkbox"/> | <input type="checkbox"/> |
| 19. | Parental consent forms completed | <input type="checkbox"/> | <input type="checkbox"/> |
| 20. | Emergency procedures in place
e.g. clear communications arrangements between accompanying staff & the school base | <input type="checkbox"/> | <input type="checkbox"/> |
| 21. | Form SM16(A) completed | <input type="checkbox"/> | <input type="checkbox"/> |
| 22. | Form to Head teacher for approval | <input type="checkbox"/> | <input type="checkbox"/> |

SIGNED _____ DATE _____
(Party Leader)

SIGNED _____ DATE _____
(EVC)

SIGNED _____ DATE _____
(Head teacher)

SM16 (A) Must be completed and returned to the Head teacher at least 2 weeks prior to visit

ANNEXE 10

CHECKLIST OF INFORMATION TO BE PROVIDED TO PARENTS

CHECKLIST OF INFORMATION TO BE PROVIDED TO PARENTS

The list below gives the information that schools should give to parents in writing before obtaining their written consent for journeys abroad or residential visits to the UK.

Day visits require a shorter list but, if the return is after school hours and/or hazardous pursuits are included, most of the information below will be required.

- a) Dates
- b) Times of departure and return
- c) Confirmation to parents of the steps of approval for the visit, i.e. Head teacher & LA accordingly and full information on any conditions that have been stipulated
- d) Method of travel, including name of travel company if any
- e) Where it is felt necessary, details of meetings/parents evenings to give detailed information about the visit. Handouts, etc, about the arrangements to fully inform those who are unable to attend the meeting.
- f) Emergency contact arrangements at home, and away, if not all pupils at one centre
- g) Name of the educational visit co-ordinator and of the leader and accompanying staff
Names and status (e.g. Parent) of other accompanying adults who will exercise some responsibility during the visit
Details of experience and expertise of accompanying staff and information regarding the training and experience of activity staff where applicable
- h) Aim to visit activities planned (any activity involving special hazard must be clearly specified). Details of all available activities
- i) Cost, what it covers and does not cover
- j) Methods of payments and cancellation arrangements
- k) Advice on pocket money
- l) Insurance affected on the pupils in respect of baggage, accidental medical cover, and cancellations. Where available, send a photocopy of insurance schedule to all parents
- m) Clothing/footwear and other items to be taken. Prohibited items
- n) Code of conduct. Details relating to the standard of behaviour expected from the pupils during the visit, including rules on smoking and alcoholic drinks
- o) Details of the arrangements for emergency medical treatment
- p) In cases where pupils have medical needs e.g. Anaphylactic, information on availability of trained staff accompanying trip in case of emergency medical procedures are required
- q) Destination with full address and telephone numbers. Information about the travel company/commercial centre
- r) Details of the arrangements for the early return of pupils

ANNEXE 11

EMERGENCY CONTACT INFORMATION

EMERGENCY CONTACT INFORMATION

To be completed before the visit. Copies to be held by the Party Leader, Head teacher and school home contact.

1. School/Group: _____
 2. Name of Party Leader: _____ Home Phone No: _____
 3. Visit Departure Date: _____ Time: _____
 4. Return Information: Date: _____ Time: _____ Location: _____
 5. Group: Total Number: _____ Adults: _____ Group Members: _____
 6. Do you have an emergency contact list for everyone in the Group? YES/NO
(If no, obtain one. If yes, attach it to this sheet)
 7. Emergency Contact Information:
 - a. During school hours:
Head teacher: _____ Tel: _____
Deputy/Other: _____ Tel: _____
 - b. Out of school hours:
Head teacher: _____ Tel: _____
Deputy/Other: _____ Tel: _____
 - c. Travel Company:
Name/Address: _____ Tel: _____ Fax: _____
Company Travel Rep. Name: _____ Tel: _____ Fax: _____
Insurance/Emergency Assistance: _____ Tel: _____ Fax: _____
Activity Centre/Hotel: _____
Address: _____

_____ Tel: _____ Fax: _____
Activity Centre/Hotel Contact (egg Rep/Manager): _____
 - d. Other Emergency Numbers: Police: _____
Fire: _____
Ambulance: _____
British Embassy/Consulate Number: _____
(If visit Abroad)
- Education Services Emergency Number: _____

ANNEXE 12

IMMEDIATE ACTION FOR AN EMERGENCY

IMMEDIATE ACTION FOR AN EMERGENCY

FOR THE PARTY LEADER AND/OR OTHER STAFF AT THE SITE

CARRY THESE PROCEDURES AND CONSENT/MEDICAL FORMS FOR PARTICIPANTS AT ALL TIMES

1 FIRST RESPONSE

- Ensure that all staff and participants are safe from further danger and all mobile telephones are switched off
- Ensure that all necessary steps are taken to provide – Rescue, medical care and hospitalisation for all those injured, missing, etc., using the Emergency Services as necessary

2 DEFINITION

An emergency is deemed to be:

- An accident leading to a fatality, major injury, or hospitalisation
- Illness to any of the party, requiring the call out of medical assistance, or leading to serious disruption of the trip
- Circumstances where any party member might be at serious risk of harm, e.g. child protection issues, missing children
- Situations where the media may become involved

3 NEXT STEPS

- a Have the phone number available on which you can be re-contacted
- b Phone the Duty On-Call Officer, available 24 hrs on –

01226 787080

c If you cannot get an answer – phone Central Call (24 hrs) on –

01226 296800

Central Control will then put you in contact with the Health, Safety and Emergency Planning and Incident Officer.

d The On Call Officer will normally deal with school/home-based procedures as far as possible, but will need information from you, so have forms and any recorded details to hand

e In case of a fatality notify the local police and record the telephone number

f Retain all equipment involved undisturbed

4 WARNING AND ADVICE

- Do not speak to the press or media
- Keep a written record of everything that happens and at what time
- If the media contacts you, refer them to the PR/press dept at Town Hall (they will be able to find the contact number for themselves)
- Never admit liability of any sort
- Do not contact parents/carers; this will be done by officers from the Authority
- Limit the phone communication of group members to the absolute minimum until a senior LA officer determines that all necessary steps have been taken
- Do not allow access to information or the group to anyone except authorised officials

Please remember that the likelihood of any emergency occurring is extremely small, and the role you play in organising off-site visits is greatly valued by the LA

ANNEXE 13

DISAPPEARANCE PROCEDURE

DISAPPEARANCE PROCEDURE

The following are suggested INITIAL procedures for adults in charge of groups taking part in off-site visits.

When one of the group fails to appear at an agreed time, or is believed to be missing.

- 1 Ask members of the party for any relevant information.
- 2 Had the missing person said or done anything that could be linked to their disappearance?
- 3 Where was this person last seen by anyone?
- 4 Keep the remainder of the party together.
- 5 Ensure that other party members do not use their mobile phones injudiciously.
- 6 Allocated any necessary jobs or responsibilities.
- 7 Phone the person on their mobile phone if they have one with them.
- 8 Return to the site of the last sighting.
- 9 Check any nearby first aid or missing person's stations.
- 10 Check toilets.
- 11 Check food outlets.
- 12 Check with the venue staff and pursue any of their procedures.
- 13 Phone the school/base contact to inform them of the situation.
- 14 Phone the local police to inform them there is concern over a missing person.
- 15 Try to plan contingencies if situation is not quickly resolved.

These procedures could take up to 2 hours, but special circumstances or needs of the participants may affect the urgency of the situation, which will need to be assessed by the party leader at the time.

IF NONE OF THE ABOVE RESOLVE THE SITUATION, AND IT IS NOW DEEMED TO BE OF SERIOUS CONCERN, FOLLOW THE EMERGENCY ACTION PROCEDURES AND CONTACT THE LA EMERGENCY NUMBER

ANNEXE 14

PUPIL WHO ABSCONDS

PUPIL WHO ABSCONDS

This procedure applies to the situation where a pupil(s) deliberately leaves a group on a visit/journey without the permission of the Group Leader.

If the incident occurs at an outdoor activity centre the Group Leader should ascertain whether the centre has its own procedure for pupils who abscond. If it does the Group Leader must collaborate with the centre staff when implementing their procedure.

If the outdoor activity centre does not have a procedure or the school party is at any other venue the following procedure is to be followed.

1. Where relevant the Centre Manager/Venue Manager must be informed.
2. The members of the school group must be asked for any information as to why the pupils have absconded, where the pupil might be going, when they were last seen and any other information which might help in locating the absconding pupil.
3. A block should be placed on pupils using their mobile phones if they are carrying them.
4. Make an immediate search of buildings, the grounds and the adjacent area.

The distance that the search is undertaken will vary according to the location. As a guide a search should last for approximately one hour.

If the pupil who has absconded is carrying a mobile phone then it is a good measure for one of their friends in the group to phone them to find out where they are or persuade them to return.

5. The rest of the group should be kept on the planned programme as far as possible.
6. If the pupil has not returned or been located at the end of one hour search period the Authority's Emergency Number must be phoned.

ANNEXE 15

COACH/MINIBUS BREAKDOWN ACCIDENT GUIDANCE

COACH/MINIBUS BREAKDOWN/ACCIDENT GUIDANCE

Motorways

These are the safest roads in the country but cause the most problems when it comes to knowing what to do in the event of a breakdown or an accident.

- 1 Breakdown – the coach is on the hard shoulder, it is daylight, the coach hazard lights are working, immediately contact the police either by roadside SOS telephone or mobile phone, give location from the nearest marker post, or sign. Keep the party on the coach unless professional judgement indicates that it is unsafe to do so. However, evacuation should be considered as a last resort.
- 2 As above, but it is dark and the lights on coach have failed. In this situation staff should consider evacuating the coach. One adult should be deployed to find a suitable place behind the crash barrier, where the party can be kept together and closely watched. Pupils should be evacuated in small groups under the supervision of an adult.
- 3
 - (a) An accident occurs involving the coach. Immediately contact the police. Keep the children calm and check for injuries.
 - (b) Where has the coach stopped? Is it on the hard shoulder or on the carriageway?
 - (c) If it is on the hard shoulder then as point 1 above.
 - (d) If the vehicle is still on the carriageway ensure that all traffic has come to a stop on the motorway before even attempting to get the children off the coach, especially if it is necessary to use the emergency exit on the offside of the coach. Ensure that an adult is the first off the coach so that the children can be taken onto the hard shoulder in small groups and away from the carriageway.
 - (e) In the event of an accident on the motorway try to be aware of what other vehicles are involved – especially goods vehicles. If a vehicle is carrying hazardous materials, they will be displaying a HAZCHEM marker board. If there is a possibility that one of these is involved, then when the adult gets off the coach to find the safest place for the pupils, be aware of which way the wind is blowing, and try to keep up wind of the lorry. If it is necessary to evacuate the coach staff should be aware of the wind direction and assemble the party up-wind of the lorry. However, it may be wiser to keep pupils on the coach.
 - (f) In the unlikely event that the accident involves the coach actually leaving the carriageway onto the grass verge or even down a banking it is important to try and make a rapid assessment of the situation. If the coach driver is unconscious it may be necessary to stop the engine. There should be an emergency stop button both in the coach, and outside, they should be clearly marked, and will only need pressing.

- (g) Call the police. It is not necessary to call all three emergency services. If you are not sure of the location, ask the driver, or find the nearest marker post at the side of the motorway.
- (h) Assess what injuries there are. If it is safe to do so evacuate the party. This should only be done when someone has identified the safest exit from the vehicle, and to assess where the pupils are going to be assembled. If it is not safe to get the pupils off the coach then leave them in position until the emergency services arrive. There may be diesel fuel leaking from the coach. This will not be a fire hazard but will make the grass or road surface very slippery. If this is the case a further call to the police should be made to inform them of the leaking diesel.
- (i) In the highly unlikely event that a fire starts on a coach it will almost certainly start at the rear of the coach or underneath in the centre. If the fire is at the rear get the pupils off the coach by the front exit starting with pupils at the back. If the fire is in the centre then both front and rear exits will have to be used. Remember when using the rear offside exit to check that it is safe to exit and be aware of other traffic. There will be a fire extinguisher on the coach easily visible.
- (j) In all the above situations the driver should be trained and be aware of what action is necessary in an emergency.

“A” Class Roads/Non Motorway Roads

- (a) In the event of any of the above happening off the motorway all of the above applies. When trying to find a safe place for the pupils care should be taken in selecting a site. It may be necessary to enlist the help of the occupiers of premises at the roadside so the pupils are completely clear of the carriageway.
- (b) If it is only a breakdown and the coach is in a built up area and vehicle speeds are relatively slow, it will always be safer for the children to remain on a coach and for them to remain seated with their seatbelts still fastened.
- (c) Obviously if the accident or breakdown is on a country road or dual carriageway then the same care must be taken as on the motorway, the children will need extra attention particularly after an accident, so everyone needs to be extra vigilant.

This information was provided with the co-operation of South Yorkshire Police, Traffic Division.

ANNEXE 16

CHECKLIST FOR THE SUITABILITY FOR USING EXTERNAL PROVIDERS

Educational Visits Provider Form



For completion by providers and tour operators who DO NOT hold a Learning Outside the Classroom (LOtC) Quality Badge. Details of the badge and a list of holders can be found at www.lotcqualitybadge.org.uk

When considering using a provider or tour operator for an Educational Visit, schools and academies must seek written assurances that the provision complies with educational visits policy and standards.

School Visit leader
Date(s) of visit Name of provider

The provider or tour operator providing services to the school named above is asked to give careful consideration to the statements below and sign in the space at the end of the form to indicate that the standard of service will meet the conditions listed. Please tick all specifications you can meet, indicate by a cross any you cannot meet, and write N/A against any specifications which do not apply to your provision.

Section A should be completed for all visits. Sections B (adventure activities), C (tour operators) and D (expeditions) should also be completed if applicable.

SECTION A - ALL VISITS

Health, Safety, and Emergency Policy

1. The provider complies with relevant health and safety regulations, including the Health and Safety at Work Act 1974 and associated regulations for visits taking place in the UK, and has a health and safety policy and recorded risk assessments which are available for inspection. ☐
2. Accident and emergency procedures are maintained and records are available for inspection. ☐

Vehicles

3. All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used. ☐

Staffing

4. All reasonable steps are taken to check staff who have access to young people for relevant criminal history and suitability to work with young people and none of our employees or volunteers have ever been the subject of any child protection concern, either in their work or personal life, including any which is time expired. ☐
5. There are adequate and regular opportunities for liaison between school staff and the provider's staff and there is sufficient flexibility to make changes to the programme if necessary and the reasons for such changes will be made known to school staff. ☐
6. The provider has never been dismissed from any employment or had a contract ended. ☐

Insurance

7. The provider has public liability insurance for at least £5 million with a clause giving 'indemnity to principal'. ☐

Accommodation (if provided)

8. UK accommodation is covered by a current fire certificate or advice has been sought from a fire officer and implemented, and a fire risk assessment has been completed. ☐
9. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned. ☐
10. There are appropriate security arrangements to prevent unauthorised persons entering the accommodation. ☐
11. Separate male and female accommodation and washing facilities are provided and staff accommodation is close to pupils' accommodation. ☐

SECTION B - ADVENTURE ACTIVITIES AND FIELD STUDIES IN OUTDOOR ENVIRONMENTS

12. Adventure Activities Licensing Authority (AALA) Licence covering dates of visit ☐ YES ☐ OUT OF SCOPE

13. If YES, AALA Licence number R.....

14. For AALA licensable activities in the UK, the specifications in this section are checked as part of the AALA inspection. However, providers licensed with AALA are asked to consider these specifications with respect to any activities or aspects of provision not covered by the licence.

Activity management

15. The provider operates a policy for staff recruitment, training and assessment which ensures that all staff with a responsibility for participants are competent to undertake their duties. ☐
16. The provider maintains a written code of practice for activities which is consistent with relevant National Governing Body guidelines and/or, if abroad, the relevant regulations of the country concerned. ☐
17. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be undertaken, or staff have had their competencies confirmed in writing by an appropriately experienced and qualified technical adviser. ☐
18. Where there is no National Governing Body for an activity, the provider has a Code of Conduct for that activity which is in line with current good practice within the UK, and this includes appropriate instructor competencies. ☐
19. Participants will at all times have access to a person with an appropriate First Aid qualification. Staff are practiced and competent in accident and emergency procedures. ☐
20. There is a clear definition of responsibilities between providers and visiting staff regarding supervision and welfare of participants. ☐
21. All equipment used in activities is suited to task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary. ☐

SECTION C - TOUR OPERATORS

Where a tour operator delivers services to schools using other providers eg. ski schools, transport operators or accommodation, the tour operator must ensure that each provider meets the relevant specifications outlined in Sections A and B of this form and that these providers operate to standards which meet the relevant regulations which apply to the country of operation.

22. Sections A and B of this form, as appropriate, have been completed to show that checks have been made. Records are available for inspection. ☐
23. The Tour Operator complies with the package travel regulations, including bonding to safeguard customers' monies. ☐
24. ATOL, ABTA or other bonding body name and numbers..... ☐

SECTION D - OVERSEAS EXPEDITIONS

25. The provider agrees to provide additional detailed information and assurances which are specific to the expedition being proposed and which will be made available to the school and its employing body. ☐

If any of the above specifications cannot be met or are not applicable, please give details:

Details of any other accreditation, eg with National Governing Bodies, tourist boards, etc.

DECLARATION

I hereby certify that I am an authorised signatory to enter into this Agreement and to bind the said company, firm, person or corporation to the terms and conditions herein.

Signed

Date

Name (print) Position in organisation.....

Full name and address of company, firm, person or corporation

.....

Tel Fax..... Email.....

Thank you for completing this form. Please return it to the visit leader and school named on the front of the form.

ANNEXE 17

REPORT OF AN INCIDENT/NEAR ACCIDENT ON A SCHOOL VISIT OR JOURNEY

BARNSELY METROPOLITAN BOROUGH COUNCIL CHILDREN'S SERVICES

REPORT ON AN INCIDENT OR NEAR ACCIDENT ("NEAR MISS") ON A SCHOOL VISIT OR JOURNEY

If injury occurred as a result of this incident then the accident reporting system should be used.

This form should be completed by the school within 2 weeks following the visit and sent directly to:
e: davidarmstrong@barnsley.gov.uk t: 01226 773586.

NAME OF SCHOOL				
ED VISITS CO-ORDINATOR				
PARTY LEADER				
DETAILS OF VISIT				
DATE(S)	FROM:		TO:	
NUMBER OF CHILDREN		AGE RANGE		
ACTIVITIES TAKING PLACE				
DETAILS OF INCIDENT/NEAR ACCIDENT:				
DATE AND TIME OF INCIDENT: _____				
WHAT CONTROL MEASURES WERE IN PLACE AT THE TIME TO MINIMISE THE FORESEEN ASSOCIATED RISKS:				
GIVE DETAILS OF ANY ADDITIONAL CONTROL MEASURES, THAT SHOULD HELP REDUCE THE LIKELIHOOD OF A POTENTIAL ACCIDENT OF THIS NATURE ON FUTURE VISITS:				
SIGNED	_____	(PARTY LEADER)	DATE	_____
SIGNED	_____	(EVC)	DATE	_____
SIGNED	_____	(HEAD TEACHER)	DATE	_____

ANNEXE 18

EVALUATION OF THE VISIT OR OFF-SITE ACTIVITY

EVALUATION OF A VISIT OR OFF-SITE ACTIVITY

Party Leaders can use this form to record details of an off-site visit or activity which

- Demonstrated exceptional good practice or
- Gave rise to significant concerns

If this information would be useful to other colleagues across the Borough, please forward to:	The LA's Outdoor Education Adviser at e: davidarmstrong@barnsley.gov.uk t: 01226 773586.
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School/Establishment	
Date of Visit	
Venue	
Party Leader	
Group Members	No. of Pupils: No. of Staff:
Activities Involved	Age Group:
External Organisations	
Please comment on any of the following issues:	
Pre-visit arrangements	
Travel arrangements	
Educational content	
Staffing & instruction	
Equipment	
Safety levels	
Suitability of venue	
Accommodation	

Food	
Alternative/downtime activities	
Communications with provider & staff during visit	
Other issues, or comments	

Signed _____ Date _____

Party Leader

ANNEXE 19

VOLUNTEER DRIVERS FORM

BARNSELEY METROPOLITAN BOROUGH COUNCIL EDUCATION SERVICES

INDIVIDUAL SCHOOL DETAILS

VOLUNTEER DRIVERS FORM

TO: The Head teacher _____ School

I confirm that I am willing to use my own vehicle for transporting pupils on visits outside of school hours. I accept responsibility for maintaining appropriate insurance cover. I have a current valid driving licence and will ensure that my vehicle is road worthy in all aspects. I will ensure young people wear seatbelts at all times.

SIGNED: _____

PRINT NAME: _____

ADDRESS: _____

DATE: _____

The LA and the school reserve the right at any time to request copies of any relevant documentation i.e. Registration Document, MOT, Insurance, and Driving Licence

ANNEXE 20

EDUCATIONAL VISITS REGISTER

**BARNSELY METROPOLITAN BOROUGH COUNCIL
CHILDREN'S SERVICES**

EDUCATIONAL VISITS REGISTER

This form should be completed for a single visit/journey or for a number of visits/journeys. Schools should use this form to keep a yearly record of all visits and journeys undertaken by pupils. A copy will need forwarding to the LA on an annual basis.

NAME OF SCHOOL.....EVC.....

Journey No	Destination	Activities	Date From	To	Responsible Teacher	Number of Teachers	Other Adults	Number of pupils	Age Range

ANNEXE 21

RISK ASSESSMENT EDUCATIONAL VISITS

RISK ASSESSMENT EDUCATIONAL VISITS

Establishment		Location/Purpose			
Leader & qualifications, where relevant		Date			
Identify significant HAZARDS	Assess the RISK	Risk rating before controls	Control measures – managing the risk		Risk rating after controls
Generic					
1. <u>Travel</u>		HIGH MED LOW			HIGH MED LOW
2. <u>Group Management</u>		HIGH MED LOW			HIGH MED LOW
3. <u>Communication</u>		HIGH MED LOW			HIGH MED LOW
Event/Site Specific					
4. <u>Environment</u>		HIGH MED LOW			HIGH MED LOW
5. <u>Participants</u>		HIGH MED LOW			HIGH MED LOW

RISK ASSESSMENT EDUCATIONAL VISITS

6. <u>Activity</u>		HIGH MED LOW		HIGH MED LOW
7. <u>Weather</u>		HIGH MED LOW		HIGH MED LOW
8. <u>Any other specific hazard</u>		HIGH MED LOW		HIGH MED LOW
9. <u>Any other specific hazard</u>		HIGH MED LOW		HIGH MED LOW
INCLUDE ANY OTHER SPECIFIC HAZARDS, RISKS, AND CONTROL MEASURES				
<u>Ongoing Risk Assessment</u> - Taking account of changing weather, behaviour, choice of activities, transport difficulties etc. - 1. Apply the control measures 2. Monitor their effectiveness 3. Change, adapt, revise as necessary				
<u>Alternative Plans – Plan ‘B’</u>				

Completed & Signed	Group Leader.....	Date
	EVC/ Officer.....		

ANNEXE 22

SCHOOL VISITS AND JOURNEYS POLICY



BARNSLEY

Metropolitan Borough Council

MODEL SCHOOL POLICY

FOR

EDUCATIONAL

VISITS & JOURNEYS

MODEL SCHOOL POLICY FOR EDUCATIONAL VISITS & JOURNEYS

GUIDANCE NOTES

The BMBC guidance for educational visits, Organising Visits & Journeys, states that:

“The school must have a policy for school visits and journeys approved by the governing body. “

The attached model policy is provided to schools to help implement arrangements for the management of off-site activities outlined in the BMBC educational visits guidance document Organising Visits & Journeys.

This model policy provides the minimum requirements for a school educational visits policy. Therefore, information may be added to it but not removed from it.

The model policy may be used as it is or it may be added to, to reflect the specific procedures, arrangements and values in place in individual schools.

For additional advice or comment on the development and application of the attached model policy please contact the council's Outdoor Education Adviser tel: 01226 773586 email: davidarmstrong@barnsley.gov.uk.

POSSIBLE ADDITIONS TO THE MODEL POLICY

The following statements give examples of the sort of information schools may wish to consider adding to the model policy to reflect their own approaches to visits and journeys and may provide a constructive basis for in-school discussion and policy development.

It may be best to insert any school-specific additions at the end of the model policy and immediately before the Chair of Governors signature under a heading such as “Additional Information”.

Statement of Values

The Governing Body seeks to ensure that every pupil has access to a wide range of educational experiences as an entitlement. As part of this entitlement the Governing Body recognises the significant educational value of visits and activities which take place away from the immediate school environment.

The Governing Body aims to enable this school to become an educational environment in which all members of the school community can thrive, regardless of race, religion, culture, gender or individual need. We intend to apply this aim to the planning and management of all visits and off-site activities.

Visits and off-site activities support, enrich and extend the curriculum in many subject areas, encourage co-operation, team work and the application of problem solving skills and develop independence and self-confidence.

Residential opportunities, physical challenge and adventure can have a particular part to play in the development of personal and social qualities for all young people. Outdoor education helps young people to be physically active and to understand how to assess and manage risk.

The management of visits and off-site activities places particular responsibilities for the health, safety and welfare of all participants on the Governing Body, head teacher, party leader, members of staff and volunteers, pupils and parents. The school also has responsibilities to other members of the public and to third parties. This policy on visits and off-site activities therefore complements the wider school health and safety policy.

The Governing Body supports/is a signatory to the government's Manifesto for Learning Outside the Classroom (Nb. more information available from www.lotc.org.uk).

School Timescales for Visit Notification and Approval

The notification and approval procedure for Category A visits is (insert a brief outline of your own procedures here).

All visit approval requests for Category B visits must be made to the Head Teacher using the Evolve system at least x weeks in advance of the visit.

All visit approval requests for Category C visits must be made to the Head Teacher using the Evolve system at least x weeks in advance of the visit.

Accidents & Incidents

All accidents and incidents taking place during school visits and journeys will be reported and recorded in accordance with the school health and safety policy. Accidents and incidents will be reviewed to identify learning points which will be shared as appropriate with others.

Emergency Procedures

The Head Teacher will ensure that emergency procedures are in place in accordance with local authority guidance and will ensure that such procedures are fit for purpose and function effectively.

Staff Training & Professional Development

Appropriate training and professional development opportunities will be made available to staff and other adults taking part in school visits and journeys to reflect identified health and safety and educational priorities.

First Aid

We aim to ensure that pupils will have direct access to high quality first aid provision at all times whilst taking part in school visits and journeys. This will include at least one adult who has an up to date working knowledge of first aid and, where necessary, holds an up to date first aid certificate.

Inclusion

We are committed to providing off-site visits and activities which are accessible to our pupils whatever their needs, abilities or medical conditions.

Visit Evaluation & Review

Information and lessons learned from the evaluation and review of visits & journeys is shared with other staff, the school management, governors and the local authority as appropriate.

SCHOOL VISITS AND JOURNEYS POLICY

SCHOOL NAME:

Policy Statement

The Governors and Head Teacher of _____ School accept their responsibility under the Health and Safety at Work Act 1974 and subordinate health and safety legislation and acknowledge the requirement to ensure that pupils are kept safe whilst on visits and journeys away from the School site.

The Governing Body have adopted and follow the Local Authority's educational visits guidance contained in the most recent edition of "Organising Visits and Journeys for Pupils".

Support for Educational Visits

The Governors recognise that pupils' participation in a wide range of visits and journeys is beneficial to their whole educational experience.

Statement of Safety Policy

As part of their responsibilities the Governing Body and Head Teacher will take all reasonable practicable steps to ensure the health, safety and welfare of pupils whilst travelling to and from, and whilst engaged in, activities away from the school site.

Statement of Safety Organisation

The School have adopted the following procedure for approving school visits and journeys:

- (i) for Category A and Category B visits, final approval must be obtained from the Head Teacher;
- (ii) for Category C visits, final approval must be obtained from the Head Teacher and the Local Authority;
- (iii) approval for visits must be provided prior to the visit taking place;
- (iv) for all Category B and Category C visits, the Evolve online system must be used for visit notification and approval purposes.

Duties

The Governing Body:

- a) will ensure that the tasks undertaken by staff organising school visits and journeys, as set out in the Authority's guidance, are adhered to; and
- b) have appointed a member of staff to be the Educational Visits Co-ordinator.

Arrangements

Arrangement number 5.7 of the School's health and safety policy sets out how the School will manage the organisation of visits and journeys:

- a) the Head Teacher will ensure that the guidance in respect of Educational Visits and Journeys is followed by all staff involved in organising visits;
- b) The Head Teacher will ensure that all visits and journeys organised by school staff obtain their approval.
- c) The Head Teacher will ensure that approval is obtained from the Local Authority for those visits requiring such approval.

Signed: _____
Chair of the Governing Body

Date: _____

ANNEXE 23

VISIT PLANNING CHECKLIST

VISIT PLANNING CHECKLIST

This checklist is an essential part of the risk management process and must be used for **all Category B & C visits**. It is designed to assist planning and preparation by visit leaders as well as monitoring and approval by EVCs and Heads of Establishment. **The visit should only go ahead if the answer to all applicable questions is 'YES'.**

Visit Name/Details:

Date(s) of Visit: **Visit Leader:**

PRIOR TO VISIT APPROVAL

✓ as
appropriate

1. Aims of visit clearly identified? ☐ yes
2. Visit agreed in principle by Head of Establishment and Visits Co-ordinator? ☐ yes
3. Visit appropriate to age, ability and aptitude of group? ☐ yes
4. Suitable progression/preparation for participants prior to visit? ☐ yes
5. Visit complies with guidelines/policies specific to your establishment? ☐ yes
6. Familiar with current edition of BMBC Visits & Journeys Guidelines? ☐ yes
7. Visit complies with relevant specific BMBC guidelines? ☐ yes
8. If member of staff to lead adventurous activity: are they competent, experienced and properly qualified? ☐ yes ☐ n/a
9. If using external provider or tour operator: Provider Form satisfactorily completed or assurances specified on form obtained? ☐ yes ☐ n/a
10. If visit involves adventurous activities led by external activity provider: AALA licensing requirements, safety standards and policies checked? ☐ yes ☐ n/a
11. If group needs specialised outdoor clothing or activity equipment: procedures in place for checking suitability and equipment meets appropriate standards? ☐ yes ☐ n/a
12. Weather forecast/other local information available, staff able to access this information and act upon it appropriately? ☐ yes
13. If swimming activities involved: staff hold appropriate life saving qualifications or qualified lifeguards on duty? ☐ yes ☐ n/a
14. If residential visit: appropriate measures taken to ensure suitability of accommodation? ☐ yes ☐ n/a
15. If overseas visit: appropriate additional measures taken to ensure suitability of activity and safety of participants? ☐ yes ☐ n/a
16. If transport required: arrangements made and LA transport guidance followed? ☐ yes ☐ n/a
17. Appropriate insurance cover in place for visit? ☐ yes
18. Financial matters dealt with appropriately? ☐ yes
19. Pre-visit undertaken - normal procedure for most visits to assist with risk ☐ yes

assessment, if not, appropriate additional checks made?

20. Risk assessment carried out for all activities and aspects of visit and appropriate control measures in place? ☐ yes
21. All staff taking part competent to undertake roles and respond appropriately to incidents and emergencies - arrange appropriate training/briefing? ☐ yes
22. If adult volunteer helpers involved: they are approved by Head of Establishment and DBS cleared where necessary (e.g. for residential visits)? ☐ yes ☐ n/a
23. Supervision ratios and arrangements comply with LA guidance, staffing level sufficient to ensure appropriate supervision at all times. ☐ yes
24. At least one member of staff knows young people in group, including behavioural traits. Participants advised in advance about expectations for behaviour? ☐ yes
25. Parental consent obtained - parents fully aware of nature and purpose of visit, including contingency plans? ☐ yes
26. All necessary information given to parents and young people? ☐ yes
27. Staff aware of medical needs/other relevant details of young people and staff/volunteers within the group? ☐ yes
28. If necessary, parental consent gained for staff to administer specific drugs/injections, named staff have received appropriate training? ☐ yes ☐ n/a
29. First Aid qualifications held by staff as appropriate - at least one responsible adult has a 'good working knowledge' of First Aid. First Aid kit available? ☐ yes
30. Flexibility within programme - contingency plans in place suitable for changed or changing conditions (e.g. staff illness, weather conditions, other factors)? ☐ yes
31. Emergency procedures in place – for group and back at establishment base. Emergency contact information held for everyone in group? ☐ yes
32. Staff aware of appropriate action in event of accident, incident or emergency. Visit Leader has copy of BMBC guidance for Immediate Action in Case of Emergency? ☐ yes
33. Full details of visit held at establishment base and by Emergency Contact(s)? ☐ yes

Additional Information

Signed (Visit Leader): Date:

ANNEXE 24

FURTHER GUIDANCE

Further Guidance

Outdoor Education Advisers' Panel

National guidance for the management of outdoor learning, off-site visits and learning outside the classroom www.oeapng.info. This is the principle source of national underpinning guidance setting out current good practice in the field of educational visits.

Department for Education

[Health and Safety Advice for Educational Visits](#)

HSE

[School Trips](#)

Others

Adventure Activities Licensing Authority www.aala.org.uk

The British Activity Providers Association www.thebaha.org.uk

Amateur Swimming Association. www.britishswimming.org

The Royal Lifesaving Society www.lifesavers.org.uk/

The Royal Society for the Prevention of Accidents [Royal Society for the Prevention of Accidents](#)

The Association for Physical Education [Association for Physical Education](#)

Travel Abroad

The Department of Trade and Industry – for the regulations governing package tours.

The School Travel Forum is a group of leading school tour operators that promote good practice and safety in school travel.

There are also voluntary bodies established to promote school journeys, such as the School Journey Association;

The Foreign and Commonwealth Office's (FCO) Travel Advice Unit.

The Young Explorers Trust for expedition work

The Department of Health gives advice on vaccination requirements in their Health Advice to Travellers information

The Royal Geographical Society with IBG's Expedition Advisory Centre, 1Kensington Gore, London SW7 2AR provides advice, information and training to anyone planning an overseas expedition. Tel: 020 7591 3030 www.rgs.org/eac

The Independent Schools' Adventure Activities Association (ISAAA) offers help, support and technical advice to any Independent School www.isaaa.org.uk

The Duke of Edinburgh's Award has its own clear structure, procedures and guidelines www.theaward.org/

Guidance is produced by many of the voluntary youth organisations

Safe Kids Campaign Report 2000. Child Accident Prevention Trust

The RGS (Royal Geographical Society) 'Off-Site Safety Management Scheme' provides a training course aimed at those who organise off-site visits. It is exam-based and teachers can combine it with practical experience.