

SAFETY AND RISK MANAGEMENT

STANDARDS

FOR

EDUCATIONAL VISITS



September 2021

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Introduction

These Standards for health, safety and risk management on educational visits are made under the BMBC corporate health and safety policy and must be read in conjunction with that policy.

Maintained schools and other educational settings where BMBC is the employer must be familiar with and comply with these standards.

Academy schools and educational settings supported by BMBC where BMBC is not the employer are advised to adopt and comply with these standards.

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

Schools and other educational settings should ensure that they are familiar with these standards and make them accessible to their staff, and that the standards and any amendments are communicated effectively to their staff.

Abbreviations

The following abbreviations are used in this document:

BMBC	Barnsley Metropolitan Borough Council
EVC	Educational Visits Co-ordinator

Review

These standards will be reviewed annually, or sooner if necessary, and revised if required.

Statement of Intent

Barnsley Metropolitan Borough Council recognises the considerable value of educational visits and outdoor activities which take place beyond the school or educational setting site. The Children's Services Directorate is keen to encourage and support the development of such activities.

The Council appreciates the commitment and enthusiasm of teachers and other staff who become involved in these activities, and is keen to encourage, advise and assist them in organising and managing educational visits, journeys and activities for the benefit of our young people.

The Council also recognises that, in relation to off-site educational visits and activities: risks may be frequent, widespread and often specialised in nature; children and young people are a vulnerable group due to their lack of experience, or absence of awareness of existing or potential risks or the fact that they have not yet fully matured; and the Council, schools and other educational settings constitute a large and complex organisation with multiple sites, frequent off-site visits and complex and specialised activities.

The Council is therefore committed to meeting its statutory duties under the Health and Safety at Work etc Act 1974 and subsequent Regulations, in particular, the Management of Health and Safety Regulations 1999; and to ensuring that other relevant statutory and common law duties and national standards of good practice are known and adhered to.

The Children's Services Directorate will therefore ensure, so far as is reasonably practicable, in relation to off-site educational visits and outdoor activities:

- the health, safety and welfare of its employees, such as teachers, support staff, youth workers and others engaged in delivering activities; and
- the health and safety of those who may be affected by the activities, such as pupils, children, young people and others.

The effectiveness of these standards rests on the understanding that all managers, staff and volunteers engaged in educational visits and outdoor activities with young people have an obligation to comply with them.

Well managed educational visits and outdoor activities make a significant contribution to the educational attainment and personal development of our children and young people. The standards set out in this document will help ensure that such activities continue to be well planned and conducted and continue to play a leading role in the learning and development programmes provided by schools and educational settings across the Borough and further afield.

MEL JOHN-ROSS

Executive Director
Children's Services

Organisation

This section outlines the key roles and responsibilities required for the management and conduct of off-site educational visits and activities.

The Executive Director, Children's Services

The main duties of the Executive Director of the Children's Services Directorate are to ensure:

- a) the provision of competent specialist advice and assistance for educational visits and activities;
- b) that policy, standards, guidance and information relating to educational visits is current, relevant, and available;
- c) through guidance documents, the provision of a framework for adoption by schools and educational settings for organising visits;
- d) the provision of advice and information about the organisation of educational visits through specialist staff, guidance, policy and standards;
- e) the provision of specific training for head teachers and managers, educational visits co-ordinators, other staff and governors about the procedures involved in the organisation of visits, where deemed necessary;
- f) the scrutiny and approval of specialised and complex visits based on the information provided by the organising school or educational setting, submitted through the appropriate approval process. This process will be monitored through inspection and audit of school or educational setting-held information when required;
- g) the provision of effective emergency and critical incident support systems and procedures;
- h) the provision and operation of an effective monitoring system for the management and conduct of educational visits and activities.

Outdoor Education Adviser

The main duties of the role of the Outdoor Education Adviser are to provide:

- a) up to date policy, standards, guidance and advice;
- b) suitable strategic training on health, safety and risk management for educational visits and outdoor activities related matters for staff to carry out their duties;
- c) specialist advice and guidance on all educational visits and in particular adventure activities and outdoor pursuits; residential visits and overseas visits; and other specialised activities and environments;
- d) suitable information and advice on instruction and supervision on all matters related to educational visits and outdoor activities;
- e) information and distribution of updates and changes relevant to all supported schools and educational settings;
- f) assistance with monitoring, audit and inspection procedures, including advice, guidance and feedback to management. This may include visiting schools and venues used by schools and other groups engaged on activities and visits on a sample basis to observe activities;
- g) advice on 24hr critical incident and emergency response and support systems and emergency plans;
- h) online visit notification and approval system and visit approval on behalf of the employer for specified categories of visit;
- i) assistance with the investigation of accidents and incidents;

- j) assistance with the selection and verification of external activity providers and contractors;
- k) assistance to ensure that staff are competent to fulfil their roles. This includes ensuring that strategic training is made available for those who need specific competence e.g. educational visits co-ordinators. In addition, assist educational visits co-ordinators give access to specific training for specialised activities and environments for staff leading or otherwise supervising visits.
- l) advice on the use of education outside the classroom for educational purposes;
- m) interpretation of relevant national guidance and legislation;
- n) liaison with colleagues in other departments and external agencies (e.g. in the fields of health and safety, insurance, legal services, safeguarding) for the provision of advice, guidance and collective opinion on matters related to educational visit and outdoor activities.

Health, Safety and Emergency Resilience Unit

The main duties of the Health, Safety and Emergency Resilience Unit are to:

- a) provide support and advice to the Outdoor Education Adviser and Executive Director for the Children's Services Directorate as necessary and when required.

School Governing Body

The main duties of the Governing Body are to ensure that:

- a) the school or educational setting policy relating to off site visits is in place and complies with the relevant regulations and guidelines;
- b) the policy is monitored and updated as necessary;
- c) school or educational setting staff are aware of and follow BMBC policy, standards and guidance for educational visits;
- d) a school or educational setting-level system for monitoring the management and conduct of educational visits and activities is in place;
- e) information from monitoring and reviews is passed on to staff as necessary;
- f) staff have time and resources to discharge their duties;
- g) decide which visits and activities they need to be informed about in advance;
- h) the head teacher and the educational visits co-ordinator have taken all reasonable and practicable measures to comply with the procedures set out in policy, standards and guidance;
- i) they are aware of any activities and the way in which they have been sanctioned through the head teacher's report.

School or Educational Setting Head/Manager

The main duties of the school or educational setting Head/Manager are to ensure that:

- a) a school or educational setting policy for health, safety and risk management on educational visits is in place;
- b) the policy is monitored and updated as necessary;
- c) an effective school or educational setting critical incident and emergency response system is in place;
- d) an effective accident, incident and near miss reporting system is in place;
- e) schools and educational settings comply with BMBC policy, standards and guidelines for educational visits and activities;
- f) suitable training is provided for staff to undertake their roles as necessary;

- g) suitable supervision arrangements are in place for visits and activities which are based on risk assessment;
- h) the risk assessment process is in place, suitable risk assessments are completed for visits and activities and are retained for inspection when required;
- i) information from standards and policy reviews and monitoring arrangements is passed on to staff as necessary;
- j) an effective system for monitoring the management and conduct of educational visits and activities is in place;
- k) staff are aware of and have ready access to all policy, standards, guidance and information relating to educational visits and activities;
- l) there is a designated, competent Educational Visits Co-ordinator and that effective liaison takes place between all staff involved in the process of organising and running of any visit;
- m) selection and verification of suitable external activity providers takes place;
- n) visit leaders and other supervising staff are competent to perform their roles;
- o) all visit planning issues have been satisfactorily addressed;
- p) all necessary policy, standards and guidance are adhered to, including, but not limited to: health and safety, inclusion, educational objectives, and charging and remissions policy;
- q) arrangements are in place for the governing body to be made aware of visits well in advance so that questions may be asked as necessary;
- r) educational visits and activities are authorised at the appropriate level before they take place.

Educational Visits Co-ordinator

All schools and educational settings must appoint a suitably competent educational Visits Co-ordinator.

The main duties of the Educational Visits Co-ordinator are to ensure that the following tasks are carried out:

- a) all visits that take place, regardless of their duration, distance away, or perceived level of risk, are scrutinised through the appropriate approval process, and are recorded;
- b) educational visits and activities are approved at the appropriate level before they take place;
- c) sufficient time is allocated to organise visits properly and obtain any necessary approval, parental consent or other relevant information;
- d) all the relevant issues outlined in visit planning checklists are addressed and detailed planning takes place;
- e) selection and verification of suitable external activity providers;
- f) there is effective liaison between themselves, governors, the head and managers, the visit leader, other accompanying adults, parents, pupils, BMBC, the outdoor education adviser and other relevant bodies to ensure adequate planning and supervision of the visit;
- g) suitable advice is sought about specific issues, such as special medical and educational needs, adventurous activities, or particular venues;
- h) the risk assessment process has been completed effectively, written risk assessments are in place and are retained for inspection when necessary;
- i) risk assessments are reviewed and adapted where necessary;
- j) near misses are reported and recorded and any lessons learned are shared with other staff as appropriate;
- k) emergency base contacts are organised for all visits and activities;

- l) accident, incident and near miss reports are completed and submitted as necessary;
- m) suitable training is provided where necessary for staff to undertake their roles competently;
- n) staff are assessed as competent to undertake their roles;
- o) where necessary, preliminary visits are undertaken;
- p) all necessary policy, standards and guidance is adhered to, including, but not limited to: health and safety, inclusion, educational objectives, and charging and remissions policy;
- q) effective supervision arrangements are in place for visits and activities, including activities requiring specialist supervision and leadership, which are based on risk assessment;
- r) records are kept of all educational visits and activities which take place;
- s) effective child protection procedures are in place for educational visits and activities;
- t) the visit leader, the head/manager, parents, pupils, and other accompanying adults know emergency procedures and contacts;
- u) there is adequate first aid provision for the visit which is based on risk assessment and needs analysis;
- v) all parties involved know the important practical arrangements such as pick-up and drop-off times and venues. It may be necessary to have a system to check that groups have returned safely if after school hours.
- w) the post-visit requirements are met: from any accident reporting to reviewing arrangements and reports forwarded to relevant bodies.

The Visit Leader

The visit leader has responsibility for the supervision and conduct of the visit and should have regard to the health and safety of the group.

The main duties of the Visit Leader are to ensure that:

- a) educational visits and activities are approved at the appropriate level before they take place;
- b) there is effective liaison between themselves, governors, the head teacher and managers, the visit leader, other accompanying adults, parents, pupils, BMBC, the outdoor education adviser and other relevant bodies to ensure adequate planning and supervision of the visit;
- c) school, educational setting, employer and or governing body requirements, regulations, guidelines and policies are followed;
- d) the risk assessment process has been completed effectively, and written risk assessments are in place;
- e) effective judgements and dynamic risk assessments are made in the field and acted upon during the conduct of the visit;
- f) suitable supervision arrangements are in place for visits and activities which are based on risk assessment and they are maintained throughout the visit;
- g) where necessary, preliminary visits are undertaken;
- h) selection and verification of suitable external activity providers takes place;
- i) effective supervision arrangements are in place for visits and activities, including activities requiring specialist supervision and leadership, which are based on risk assessment;
- j) risk assessments are reviewed and adapted where necessary;
- k) all the relevant issues outlined in visit planning checklists are addressed and detailed planning takes place;
- l) near misses are reported and recorded and any lessons learned are shared with other staff as appropriate;

- m) accident, incident and near miss reports are completed and submitted as necessary;
- n) emergency base contacts are organised for all visits and activities;
- o) a competent deputy visit leader is appointed where visits either extend beyond the school day or where the numbers of pupils undertaking the visit require additional support;
- p) the visit, venue and activities match the abilities and needs of the pupils, the competence of staff and the educational objectives;
- q) all other staff are aware of their role, all the organisational details and emergency procedures and contacts;
- r) educational visits and activities are approved at the appropriate level before they take place;
- s) their competence and knowledge of the venue match the activities they lead and enable them to determine when unsuitable activities are adjusted or curtailed;
- t) effective child protection procedures are in place for educational visits and activities;
- u) suitable first-aid provision is available based on risk assessment;
- v) the ratio and competence of supervisors to pupils is appropriate for the needs for the group;
- w) staff and other supervisors have the details of pupils' special educational or medical needs which will be necessary for them to carry out their tasks effectively;
- x) any programmed "free time" for pupils is suitably organised with effective supervision arrangements in place.

Other Visit Staff

Other supervising staff employed by the school or educational setting have a duty of care for the safety and welfare participants.

The main duties of other supervising staff are to ensure that:

- a) they fully understand their role within the party;
- b) they are competent to undertake their role during the visit;
- c) they follow the visit leader's instructions;
- d) they have any necessary information about pupils and organisation;
- e) they are aware of emergency procedures and contacts;
- f) inform the visit leader of any safety concerns, or inform the school or educational setting if the visit leader does not implement suitable control measures which may be required by changes in circumstances;
- g) they have sufficient information and resources to enable them to contribute to the effective and safe running of the visit, particularly participant details and emergency procedures.

Adult Volunteers

When parents or other non-teacher adults act voluntarily to assist with visits and activities they also owe a duty of care to the children and young people taking part.

The main duties of adult volunteers are to ensure that:

- a) they fully understand their role within the party;
- b) they are competent to undertake their role during the visit;
- c) they follow the visit leader's instructions at all times;
- d) they have any necessary information about pupils and organisation;
- e) they are aware of emergency procedures and contacts;

- f) inform the visit leader of any safety concerns, or the school or educational setting if for some reason the visit leader does not implement control measures necessitated by changes in circumstances;
- g) they have sufficient information and resources to enable them to contribute to the effective and safe running of the visit, particularly pupil details and emergency procedures.

External Agencies or Activity Providers

If an activity or visit involves the use of an external agency or activity provider, that agency or provider must be thoroughly scrutinised and assessed as suitable by the visit leader, the educational visits co-ordinator and the head or manager.

The main duties of external agencies or activity providers are to ensure they:

- a) comply with any activity provision agreements made;
- b) comply with their statutory duties for health and safety and other matters relating to their provision;
- c) follow best practice in the provision of activities;
- d) comply with any licensing and quality assurance requirements for activity provision;
- e) ensure suitable liaison takes place with the visiting school or educational setting staff so that roles and responsibilities are clearly defined and understood;

Pupils and Students

Pupils and students should understand their responsibilities during the visit or activity.

The main duties of pupils and students are to:

- a) follow the instructions of the visit leader and other supervisors at all times during a visit;
- b) avoid taking unnecessary risks or activities that have not been assessed or are not included within the visit programme;
- c) inform the visit leader or other supervisors of anything they feel might harm themselves or others;
- d) be sensitive to local codes and customs, particularly when overseas.

Parents and Guardians

Parents and legal guardians have an important role to play in ensuring the success of educational visits and activities.

The main duties of parents and legal guardians are to ensure that they:

- a) understand the nature of their child's visit including the types of activity, venues, costs, timings and other arrangements;
- b) understand the code of conduct, that their child agrees to abide by this, and the consequences of the child having to be returned home for it being breached;
- c) attend briefing meetings where necessary to clarify visit and activity details, particularly for residential visits and where adventure activities or hazardous environments or overseas travel is involved;
- d) provide the visit leader with emergency contact details, relevant medical details, and written consent for the child to take part in the trip;
- e) provide informed consent (or withhold consent, explaining why) for participation of their child in the visit or activity;
- f) provide clear and up to date medical information about their child.

Arrangements

This section outlines the practical arrangements which are in place for the implementation of these standards.

1. Standards

- 1.1. BMBC provides and maintains standards which are specific to health, safety and risk management on educational visits (these standards) which are communicated to schools and educational settings.
- 1.2. Schools and educational settings must ensure that they and their staff are aware of and comply with these standards for health, safety and risk management on educational visits.
- 1.3. Schools and educational settings are responsible for ensuring that they have in place a school or educational setting specific standards for health, safety and risk management on educational visits.
- 1.4. The standards must be reviewed and revised as necessary and its contents must be communicated effectively to staff.

2. Guidelines

- 2.1. BMBC provides written guidelines for the safe conduct of educational visits and activities called Organising Visits and Journeys. BMBC also provides additional supplementary guidelines on a range of specialised aspects of educational visits.
- 2.2. BMBC recognises the National Guidance published by the Outdoor Education Advisers Panel as the key national reference point for educational visits guidance.
- 2.3. Schools and other establishments must ensure that their staff are aware of and conduct visits and activities in accordance with BMBC guidelines and with National Guidance.
- 2.4. Additional procedural guidance is provided on BMBC's Evolve online visits system.
- 2.5. For advice on interpreting BMBC guidelines or national guidance or applying it to specific visits or particular circumstances, schools and educational settings should contact BMBC's outdoor education adviser.

3. Specialist Advice

- 3.1. BMBC provides ready access to competent, specialist and up to date advice on all aspects of planning, managing and conducting educational off-site visits and activities through the outdoor education adviser;
- 3.2. Schools and educational settings must ensure that their staff are able to contact the outdoor education adviser when necessary and must ensure that any advice or guidance provided is followed.

4. Monitoring

- 4.1. BMBC provides access to support for monitoring educational visits management and practice. This includes access to support for periodic review of school and educational setting safety management systems for educational visits, in-the-field visit observations, review of visit data and data from monitoring activities, and the provision of self-evaluation materials to schools and educational settings.

- 4.2. Schools and educational settings are responsible for ensuring that they implement effective monitoring processes for educational visits and they comply with any requirements of BMBC, in relation to monitoring arrangements and any recommendations resulting from monitoring processes.

5. Review and Improvement

- 5.1. BMBC provides access to support for ensuring that information obtained from monitoring processes is reviewed so that action can be taken to make improvements when necessary and that such information is shared with other schools and educational settings as appropriate.
- 5.2. Schools and educational settings must ensure that they implement effective systems for reviewing and acting upon the findings of their monitoring processes for educational visits.

6. Information and Communication

- 6.1. BMBC provides to schools and educational settings access up to date information about safety and risk management issues relating to educational visits and activities using a variety of accessible methods.
- 6.2. Schools and educational settings must ensure that they access such information and that it is communicated effectively to staff and others as necessary.

7. Emergency Procedures and Critical Incidents.

- 7.1. Schools and educational settings must ensure that they have in place robust arrangements and procedures for responding effectively to incidents and accidents, including serious incidents and near misses during educational visits. This information must be communicated clearly to relevant staff.
- 7.2. A school or educational setting emergency base contact must be identified for all off-site educational visits who must have access to all relevant information about the visit to be able to respond effectively if required.
- 7.3. Schools and educational settings must ensure that staff involved in conducting educational visits and activities carry with them during visits emergency contact details and information on contacting BMBC and their own establishment's emergency response system where necessary.

8. First Aid

- 8.1. BMBC provides access to advice and guidance on first aid arrangements for off-site educational visits and activities.
- 8.2. Schools and educational settings must provide first aid services and facilities to staff and pupils taking part in educational visits and activities based on risk assessment and first aid needs analysis and must have in place their own first aid policy. Such provision must meet, as a minimum, the standards required by the Health and Safety at Work (First Aid) Regulations 1981 (as amended).

9. Accident and Incident Reporting and Investigation

- 9.1. Schools and educational settings must ensure that accidents, incidents and near misses taking place during educational visits and activities are reported in compliance with the

Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 2013 (and any subsequent amendments) and in compliance with BMBC's policy on accident and incident reporting and investigation.

- 9.2. Reporting, recording and investigations must be conducted by heads or managers and, where necessary, with the assistance of BMBC's outdoor education adviser. Information from such reports, records and investigations must be shared with BMBC's outdoor education adviser to ensure that lessons may be learned and practice improved and so that information is shared effectively with others as appropriate.

10. Roles and Responsibilities

- 10.1. The statutory duty holder for health, safety and risk management on educational visits is the employer (BMBC, the Trust Board or the governors depending on circumstances) under health and safety legislation.
- 10.2. Many of the functions, tasks and responsibilities for compliance with the relevant statutory duties are delegated to schools and educational settings.
- 10.3. Roles and responsibilities are set out in the section of these standards headed 'Organisation'.
- 10.4. Responsibilities for managing many of the tasks and functions required for effective safety and risk management on educational visits are also identified in this part of the standards called 'Arrangements'.
- 10.5. Schools and educational settings must ensure that all staff involved in managing and conducting educational visits are aware of and understand their respective roles and responsibilities.

11. Educational Visits Co-ordinator Role

- 11.1. All schools and educational settings must appoint an educational visits co-ordinator to provide support and assistance to staff organising and conducting educational visits, and to managers who scrutinise and authorise visits to take place.
- 11.2. Schools and educational settings must ensure that the educational visits co-ordinator is suitably experienced and competent to undertake the role and they are provided with the time, resources and management support necessary to carry out the role effectively.
- 11.3. Educational visits co-ordinators must attend an educational visits co-ordinator training course which focuses on BMBC policy, standards and guidance requirements as well as systems and processes for visit planning and management.
- 11.4. Educational visits co-ordinators must keep up to date with developments in the field of educational visits and attend refresher training as necessary.

12. Visit Notification and Approval

- 12.1. BMBC provides access to the Evolve online educational visits notification and approval system for use by schools and educational settings. BMBC also provides access to specialist scrutiny and approval of specified categories of visits and activities.
- 12.2. Schools and educational settings must ensure that educational visits and activities are notified, recorded, scrutinised and approved in accordance with these standards before they take place and in accordance with specified time-scales.
- 12.3. Schools and educational settings must use the Evolve online visits system for the notification, recording and approval of specified categories of off-site educational visits.

- 12.4. An off-site educational visit is defined as whenever pupils leave the school or educational setting site for educational purposes organised by and under the responsibility of the school or educational setting.
- 12.5. For the purposes of planning, notification and approval, off-site educational visits are classified into three categories as follows.

CATEGORY	DEFINITION	NOTIFICATION, APPROVAL & TIMESCALES
Category A	<p>Straightforward routine day visits and activities requiring standard planning which are:</p> <ul style="list-style-type: none"> ★ local to the school ★ and ★ take place mainly during school hours. <p>Key requirements:</p> <ul style="list-style-type: none"> ★ generic risk assessment regularly reviewed and adapted if necessary ★ annual informed parental consent if required ★ appropriate information provided to parents 	<p>Must be authorised by the Head/Manager.</p> <p>Notification and approval of Category A visits is subject to the school or educational setting's internal policy and procedures. Evolve may be used for this purpose if required.</p> <p>Timescale for notification to the school or educational setting management for authorisation is subject to establishment's policy and operating procedures.</p>
Category B	<p>Day visits and activities requiring enhanced planning which:</p> <ul style="list-style-type: none"> ★ may extend significantly beyond the normal school day; and/or ★ involve travel beyond the local area <p>Key requirements:</p> <ul style="list-style-type: none"> ★ event-specific risk assessment ★ event-specific parental consent ★ event-specific information to parents 	<p>Must be authorised by the Head/Manager.</p> <p>Evolve must be used for notification and approval.</p> <p>Timescale for notification to school or educational setting management for authorisation on the Evolve system is advised to be least two term time weeks in advance of the visit.</p>
Category C	<p>More complex and specialised visits and activities which include:</p> <ul style="list-style-type: none"> ★ overseas travel ★ adventure activities or specialist hazardous activities ★ remote or hazardous environments ★ residential visits <p>Key requirements:</p> <ul style="list-style-type: none"> ★ event-specific risk assessment 	<p>Must be authorised by the Head/Manager and approved by BMBC's outdoor education adviser.</p> <p>Evolve must be used for notification and approval.</p> <p>Timescale for authorisation by the school or educational setting Head/Manager and submission to BMBC's outdoor education adviser is at least four term time weeks in advance of the visit. This is to provide</p>

- ★ event-specific parental consent
- ★ event-specific information to parents

adequate time for checks to be made and advice to be provided and acted upon before the visit takes place.

- 12.6. It is the responsibility of the school or educational setting to ensure authorisation and approval of visits has taken place at the appropriate level before the visit takes place.
- 12.7. The term approval in the context of the Evolve online system indicates that the declarations, assurances, undertakings and information provided by the school or educational setting in answer to questions on the visit form appear consistent with educational visits guidelines and standards of good practice.
- 12.8. Any additional information which may be contained in documents attached to the Evolve visit form will be randomly sampled as part of routine visit monitoring processes. Comment may be provided on particular documents only if specifically requested by the school or educational setting.
- 12.9. It is the responsibility of the school or educational setting to ensure planning documents for visits, such as risk assessments, are suitable and sufficient for their intended purpose. If a school or educational setting requires scrutiny or comment on particular risk assessments or other documents attached to the visit form, beyond those which may be viewed during routine sample monitoring processes, a specific request must be made.
- 12.10. School or educational setting staff should not sign contracts with providers or make commitments to participants or parents until sure that requirements for approval can be met, they are encouraged to ask the outdoor education adviser to comment on un-submitted draft plans on Evolve for complex visits at an early stage, which could be a year or more before the visit.

13. Transport

- 13.1. Schools and educational settings must ensure that they comply with BMBC's standards on using contractors when hiring external transport for educational visits.
- 13.2. Schools and educational settings must ensure that transport providers are compliant with the Contractors' Health and Safety Assessment Scheme (CHAS) or be registered and approved for this specific work under the Safety Schemes in Procurement (SSIP) system. In situations where this may not be feasible or appropriate suitable due diligence must be undertaken to ensure the safety and quality of the transport provision being arranged.
- 13.3. Where minibuses are used to provide transport for educational visits, Schools and educational settings must ensure compliance with BMBC's guidance for the safe use of minibuses.
- 13.4. Schools and educational settings must comply with the law on the use of seat belts and child restraints in vehicles.

14. Insurance

- 14.1. Schools and educational settings must ensure that all educational visits and activities are suitably insured and that the details of such insurance are made available to parents and others as appropriate.

15. Visit Planning

- 15.1. Schools and educational settings must ensure that suitable visit planning takes place to ensure, so far as is reasonably practicable, the health, safety and welfare of participants, staff and others during the visit.
- 15.2. Schools and educational settings must ensure that staff organising and planning visits have access to and follow BMBC policy, standards, guidance and any advice provided to them on behalf of BMBC.

16. Commissioning

- 16.1. If an organisation outside BMBC is commissioned to provide a service which may include educational visits or activities, Schools and educational settings must ensure it follows these standards or has in place its own policies and procedures which, as a minimum, meet the same standards.
- 16.2. Schools and educational settings must understand that their duty of care for the safety and wellbeing of young people cannot be delegated to organisations providing educational visits and activities on their behalf. They must have in place suitable processes for the selection and verification of providers, for the effective quality assurance of services being provided to them and for ensuring appropriate insurance arrangements are in place.

17. External Activity Providers

- 17.1. BMBC provides access to up to date advice and guidance on suitable external accreditation schemes and methods of obtaining suitable assurances from providers about safety and risk management during visits and activities.
- 17.2. Schools and educational settings must ensure that external activity providers hold credible external accreditation for the activities they provide and for the dates of the proposed visit.
- 17.3. Schools and educational settings must obtain suitable assurances from the provider about visit safety and quality before agreeing to the visit or activities.

18. School Led Adventure Activities

- 18.1. BMBC provides access to specialist advice and assistance in identifying, interpreting and checking specialist competencies and evidence of competence held by staff.
- 18.2. Where school or educational setting staff aim to deliver specialist leadership and supervision for adventurous activities, schools and educational settings must ensure staff are suitably competent to undertake the role. Schools and educational settings must ensure they obtain and keep records of suitable evidence of such competence.
- 18.3. Where nationally recognised qualifications exist they must be held and kept up to date, or an equivalent qualification or statement of competence must be provided by a suitable technical expert.
- 18.4. Specialist outdoor leadership qualifications must be uploaded to the staff member's profile on the Evolve system.

19. Adventure Activities Licensing Regulations

- 19.1. BMBC provides access to advice and guidance on adventure activities licensing requirements.

- 19.1. Where an external provider of adventure activities is proposed to be used, schools and educational settings must check whether the provider is required to hold a license for such activities under the Adventure Activities Licensing Regulations 2004 (and any subsequent amendments).
- 19.2. Where a provider is required by the regulations to hold a license, schools and educational settings must check that the provider holds a valid license for the activities proposed and for the dates of the visit and must only use a suitably licensed provider for such activities.

20. Duke of Edinburgh's Award

- 20.1. BMBC provides access to specialist advice and guidance on safety and risk management for Duke of Edinburgh's Award expeditions.
- 20.2. Schools and educational settings operating the Duke of Edinburgh's Award must ensure they comply with safety and risk management advice provided on behalf of BMBC.
- 20.3. Schools and educational settings operating the Duke of Edinburgh's Award are responsible for complying with any planning or operational conditions required by the Duke of Edinburgh's Award Scheme.

21. Good Practice Requirements

- 21.1. Schools and educational settings must ensure that they and their staff keep up to date with current good practice in the field of educational visits and activities, and that such information is shared and communicated effectively with others as appropriate.

22. Duty of Care

- 22.1. Schools and educational settings must ensure that they understand that the duty of care they owe to pupils in their care during educational visits and activities cannot be delegated to others, even if they have commissioned services to be provided on their behalf, and that the duty of care extends for the full duration of the visit or activity.

23. Training

- 23.1. BMBC provides access to strategic training on policy, standards, guidelines and procedures for staff including educational visit co-ordinators, governors, heads and managers; and information and advice on identifying and procuring all other training related to educational visits and activities.
- 23.2. Schools and educational settings must ensure that their staff receive any training, including where necessary refresher training, which is required for them to keep up to date and to be able to carry out their roles and responsibilities competently.

24. Assessment of Leader Competence

- 24.1. BMBC is committed to ensuring that staff and others supervising children and young people during educational visits have appropriate training, knowledge, skills and understanding to be able to competently undertake their roles.
- 24.2. Schools and educational settings must ensure that they seek assurances and evidence about staff competence to lead or supervise visits or activities.
- 24.3. Where specialised activities or environments are involved, advice should be sought from BMBC's outdoor education adviser.

25. Risk Assessment

- 25.1. BMBC is committed to implementing risk assessment procedures in compliance with the Management of Health and Safety at Work Regulations 1999 (and any subsequent amendments) to identify, assess and control, so far as is reasonably practicable, the hazards and risks identified for particular visits, activities and environments which could affect staff, pupils or others.
- 25.2. Schools and educational settings must ensure that suitable and sufficient risk assessments are conducted for all educational visits and activities and the significant findings are recorded and acted upon. Such records must be retained according to the requirements of BMBC's records retention policy and made available for inspection if required.
- 25.3. Risk assessments attached to visit forms on the Evolve system will be subject to routine sample monitoring processes. This does not mean that all risk assessments will be scrutinised for each visit on the system.
- 25.4. It is the responsibility of the school or educational setting to ensure risk assessments are suitable and sufficient for their intended purpose and that their staff are competent to carry them out. If a school or educational setting requires scrutiny or comment on a particular risk assessment attached to the visit form, which may be beyond those viewed during routine sample monitoring processes, a specific request must be made for this purpose.
- 25.5. Schools and educational settings must ensure their staff taking part in off-site educational visits are competent to undertake and act upon dynamic risk assessments which may need to be made in the field whilst visits are in progress.

26. Preliminary Visits

- 26.1. Schools and educational settings must ensure that, where appropriate and where feasible, preliminary visits to providers, locations and venues are conducted by staff planning educational visits and activities.
- 26.2. Where it is judged impractical to undertake a preliminary visit, schools and educational settings must ensure that suitable measures are put in place to properly inform the risk assessment and planning process for the visit.

27. Child Protection

- 27.1. BMBC is committed to the safeguarding and welfare of children and young people and compliance with its statutory obligations as set out in the most recent edition of the Department for Education (DfE) statutory guidance document Keeping Children Safe in Education (and any subsequent amendments).
- 27.2. Schools and educational settings must comply with this guidance and BMBC's safeguarding and child protection policies and procedures and must ensure that their staff are aware of and comply with such guidance.

28. Supervision

- 28.1. BMBC is committed to the importance of providing effective and appropriate supervision for children and young people taking part in educational visits.
- 28.2. Schools and educational settings must ensure that effective, appropriate and active supervision is in place for all educational visits and activities and that such supervision is

provided by a suitable number of experienced and competent teachers, leaders and other adults.

29. Records Retention

- 29.1. BMBC has in place a records retention policy which is based on national guidelines from the Information and Records Management Society.
- 29.2. Schools and educational settings must ensure that suitable records of educational visits and activities are retained in compliance with BMBC's policy on records retention.

30. Overseas Expeditions

- 30.1. BMBC is committed to the value of students taking part in challenging overseas expeditions where appropriate and provides access to specialist advice, guidance and assistance for the planning and management of overseas expeditions.
- 30.2. Schools and educational settings planning to use an external activity provider or specialist expedition company must ensure that their provider holds appropriate external accreditation for the activities and dates proposed.
- 30.3. Schools and educational settings must ensure that proposals for such expeditions are notified to and discussed with BMBC's outdoor education adviser before any contractual arrangements are entered into and before any payments have been made. This is likely to be at least twelve months or more in advance of the visit taking place.

31. Swimming and Water Environments

- 31.1. BMBC provides access to up to date guidance on outdoor swimming and the use of natural water environments for educational visits and recognises that such environments present significant risks if not properly managed.
- 31.2. Schools and educational settings must ensure that swimming and paddling or otherwise entering the waters of a river, canal, sea or lake are not allowed as an impromptu activity. They must take place only when a suitable risk assessment has been completed and appropriate measures put in place to control the risks. The activities should be formal and supervised effectively.

32. Outdoor Equipment

- 32.1. BMBC is committed to complying with the Provision and Use of Workplace Equipment Regulations (PUWER), the Personal Protective Equipment (PPE) Regulations and the Control of Substances Hazardous to Health (COSHH) Regulations (and any subsequent amendments to these regulations) in so far as they apply to educational visits and activities.
- 32.2. BMBC provides access to specialist advice and guidance on the storage, maintenance and use of specialist outdoor equipment and materials.
- 32.3. Schools and educational settings must ensure that maintenance, storage and use of technical outdoor equipment and resources, such as (but not limited to) camping equipment, camp cooking equipment and fuel, is undertaken and supervised by staff who are competent to do so. The use of such equipment by young people must be subject to competent supervision and training and effective risk assessment processes.

33. Charging for Educational Visits

- 33.1. BMBC is committed to compliance with the law on charging for school activities as set out in current government guidance.
- 33.2. Schools and educational settings must ensure they comply with the law on charging for school activities and with BMBC's policy on charging for school activities and must ensure that their staff are aware of the statutory requirements and comply with them.

34. Inclusion

- 34.1. BMBC is committed to the inclusion of all children and young people in their educational visits and activities and to ensuring that reasonable adjustments are made to include those with disabilities in visits and activities in compliance with the Equality Act 2010 (and any subsequent amendments).
- 34.2. Schools and educational settings must ensure they make reasonable adjustments to include all children and young people in educational visits and activities in compliance with the Equality Act 2010 (and any subsequent amendments).

35. Young Persons

- 35.1 BMBC recognises that children and young people are a vulnerable group due to their lack of experience, or absence of awareness of existing or potential risks or the fact that young persons have not yet fully matured.
- 35.2 BMBC provides access to advice and guidance on good practice for the supervision and risk management of young people during educational visits and activities.
- 35.3 Schools and educational settings must ensure that suitable planning, competent supervision and risk assessment and risk management procedures are put in place, which take into account the additional vulnerability of children and young people to hazard and risk during educational visits.

36. Parental Consent and Information

- 36.1. BMBC provides access to advice and guidance on obtaining informed parental consent for children and young people taking part in educational visits and activities.
- 36.2. Schools and educational settings must ensure that, where necessary, informed parental consent is obtained for off-site educational visits and activities and that up to date medical information is provided to visit staff.
- 36.3. Schools and educational settings must ensure that parents and guardians are provided with clear information about when and where off-site educational visits and activities are taking place and any specific arrangements which apply to the visit or activity.

37. Physical Education and Sport

- 37.1. BMBC supports the guidance contained in the most recent edition of Safe Practice in Physical Education and Sport published by the Association for Physical Education (AfPE).
- 37.2. Schools and educational settings should conduct activities in accordance with the guidance contained in the most recent edition of Safe Practice in Physical Education and Sport published by the Association for Physical Education (AfPE).

- 37.3. Schools and educational settings must ensure that they provide their staff with ready access to a copy of the most recent edition of Safe Practice in Physical Education and Sport published by the Association for Physical Education (AfPE).
- 37.4. If there is perceived to be any difference between the advice contained in any part of the most recent edition of Safe Practice in Physical Education and Sport published by the Association for Physical Education (AfPE) and any other guidelines for off-site educational visits and activities, schools and educational settings should contact the BMBC Outdoor Education Adviser for advice.

38. Swimming Pools

- 38.1. Schools and educational settings must follow the guidelines on Swimming Pools contained in National Guidance for educational visits published by the Outdoor Education Advisers' Panel.
- 38.2. For additional advice or for interpretation of this guidance schools and educational settings should contact the BMBC Outdoor Education Adviser.

39. Infection Prevention and Control

- 39.1. BMBC is committed to the implementation of effective prevention and control measures to minimise the risk of infection during off-site educational visits and activities.
- 39.2. BMBC provides information and resources about known, new or emerging infectious diseases and related guidance which may affect off-site educational visits and activities.
- 39.3. BMBC supports compliance with relevant statutory duties set out in the health and safety at Work act 1974 and subsequent Regulations and other related legislation such as the Food Safety Act 1990 (and amendments) and the Public Health Acts 1984 and 1988 (and amendments).
- 39.4. Schools and educational settings should identify and implement suitable measures and procedures for the prevention and control of infection and should organise and conduct educational visits and activities in a manner that minimises the risk of infection to pupils, staff and others who may be affected.
- 39.5. Schools and educational settings should ensure risk assessment processes for educational visits and activities identify and address the issue of infection prevention and control where known, new or emerging risks are present.

40. GDPR and Information Security

- 40.1. BMBC is committed to compliance with the Data Protection Act 2018 and the General Data Protection Regulations (GDPR) 2018 and ensuring the protection of personal data held and under its control.
- 40.2. Schools and educational settings should be responsible for the care of data and information in their control relating to off-site educational visits and activities.
- 40.3. Schools and educational settings should maintain their own policies and procedures in order to comply with data protection and information security obligations.