

Off Site Trips and Visits Policy

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INTRODUCTION

The aim of this policy is to set out the Trust's expectations for all off site visits and trips. Headteachers and EVCs must ensure they are aware of sections 1 -33; section 34 onwards covers specific activities. All school staff should have access to the policy. For further support and guidance please contact the Trust Health and Safety Manager.

1. BACKGROUND AND LEGAL INFORMATION

Romero Catholic Academy Trust (The Trust) acknowledges the immense value of educational visits to children and young people, and fully supports and encourages all off-site activities that are correctly planned, managed, and facilitated. We believe that all establishments should strive for high quality educational visits in order to maximise the educational benefits to the children and young people taking part.

The Trust expects schools to follow the extensive advice offered through the [Outdoor Education Advisers Panel \(OEAP\)](#) for guidance in making essential decisions while planning and enjoying off-site activities and outdoor visits. The OEAP are endorsed by both the Department for Education (DfE) and the Health and Safety Executive (HSE).

This Trust guidance has been produced to help schools make visits as enjoyable, rewarding and as safe as possible. It summarises the procedures which should be followed by all Trust employees in the management of visits and similar off-site activities. Information contained in this guidance document applies to all staff and volunteers working in Trust schools.

2. THE LEGAL FRAMEWORK AND SCOPE

The Health and Safety at Work etc Act 1974 (HSAWA) requires employers to do all that is reasonably practicable to ensure the health, safety, and welfare at work of employees and non-employees who could be affected by their undertaking. This includes off-site activities.

The Management of Health and Safety at Work Regulations places a duty on the trip organiser to carry out a suitable and sufficient risk assessment of the activities they lead on, and to ensure that if other persons (for example, instructors) take charge of activities, then those persons have provided a suitable and sufficient risk assessment for the activities they offer.

Common law expects people acting 'in loco parentis' to "take the same care as would a reasonable and careful parent". This legal duty applies to teaching and support staff on all educational visits and off-site activities and cannot be delegated. In addition, there is a higher duty of care on teachers and other professional staff as a consequence of greater knowledge they are assumed to have of children and of specialised activities. The level of judgement expected of staff is related to that individual's knowledge, experience and training.

In the event of an accident taking place during a trip or activity, and any Health & Safety Executive (HSE) intervention, documentation will be assessed to establish if the organisation and or individual did or did not take reasonable care. If the conclusion is that the organisation or the individual did not, the visit leader, head teacher, CEO or Trust board could be found to be negligent. A key part of any investigation would be whether the employer's health and safety policy and procedures are adequate and had been followed by its employees.

Therefore, all schools in the Trust must adhere to the requirements of this document and follow the advice contained. Schools must also use and follow OEAP guidance as this sets the national standard for trip/visit management.

Where additional advice on the management of school trips is needed, the visit leader should consult with the school EVC who will contact the Trust Health and Safety Manager as needed.

3. ROLES AND RESPONSIBILITIES

Extensive guidance on roles and responsibilities on educational visits can be found in the [OEAP National Guidance](#), all staff with responsibilities should make themselves aware of these roles. The following is a summary of the key safety responsibilities.

The Trust board must ensure:

- This policy is ratified and communicated to schools in the Trust.
- That schools follow this policy and appendices and the processes it outlines.
- Schools have access to EVC training and support.
- Accidents, incidents and near miss events on trips and visits are reported and investigated.

The Headteacher must ensure:

- They are familiar with the Trust policy and appendices for outdoor learning and off-site visits.
- All activities and visits comply with the Trust policy and OEAP National Guidance
- They approve visits and ensure they are submitted to the Trust for review as needed.
- They have identified a Educational Visits Coordinator (EVC) who meets the DfE requirements [Health and safety on educational visits - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/health-and-safety-on-educational-visits)
- Staff are clear about their roles and responsibilities at all times before, and during a trip or visit.
- All leaders are appropriately competent, confident and aware they are accountable.
- Training certificates are held for staff who need specific training to lead trips and visits.
- They support the EVC in ensuring that all activities and visits are effectively supervised with an appropriate level of leadership.
- They support the EVC in ensuring that information has been shared with parents, and consent has been given if required.
- Suitable safeguarding procedures are in place, including appropriate vetting of all adults including volunteers, helpers, and visitors.
- They assign sufficient time for leaders to organise activities and visits properly.
- Arrangements have been made for the medical and special educational needs of all participants and staff.
- Appropriate insurance arrangements are in place.
- Where the activity or visit involves a third-party provider, appropriate checks have been made and assurances obtained. A clear contract should be in place setting out what the contractor will provide.
- There are suitable emergency procedures in place for each visit.
- Details related to off-site activities and visits (including personal details of both participants and leaders) are accessible at all times to designated 24/7 emergency contacts, in case of a serious incident.
- Confirm emergency contact are contactable and available for the full duration of the visit 24 hours a day and, have the authority to make safety-based decisions.
- Ensure any accidents, incidents or near miss events are recorded by the provider, or where school is leading or managing the activity, the school.
- Confirm that accident forms completed by school staff include details of the investigation.

- All visits are reviewed after the visit takes place, to determine what went well, what improvements are needed, and if the provider met expectations.

4. EDUCATIONAL VISITS COORDINATORS (EVC'S):

All schools should nominate an Educational Visits Coordinator (EVC). This is not a legal requirement but is a requirement of the Trust following best practice and OEAP guidance. The EVC will:

- Be appointed by, and will act on behalf of, the Head Teacher
- Be specifically competent, often having practical experience in leading and managing a range of visits similar to those typically run by the establishment. Commonly, but not exclusively, such competence will be identified in a person on the senior management team of the school.
- Be the principal contact with the Trust Health and Safety Manager over visits planned by the school.
- Will undertake EVC training and refresher training made available to them.
- Ensure that the DfE advice, this guidance, the school's own policy, and/or any other relevant documentation is readily available for access by staff including the OEAP National Guidance as a key planning tool.
- Support and oversee trip planning so that well considered and prepared arrangements lead to well-managed, engaging, relevant, enjoyable and memorable visits and outdoor learning.
- Support the headteacher in ensuring that the establishment fulfils its duty of care and complies with legal requirements.
- Ensure good practice in the provision of visits and outdoor learning.
- Mentor leaders and new leaders, supporting their ongoing development and training.
- Ensure that leaders are competent to lead the activities and visits to which they are assigned or wish to complete.
- Ensure that Disclosure and Barring Service (DBS) disclosures are in place as necessary.
- Support leaders to ensure that parents are fully informed about visits, and to obtain parental consent as necessary.
- Anyone designated as an emergency contact, is contactable and available for the full duration of the visit 24 hours a day and, has the authority to make safety-based decisions.
- Confirm that emergency action cards are developed for trips as needed (see appendix 3)
- Review standards of trips and visits and identify any training needs.
- Ensure that planning complies with the Trusts requirements and that, where required, the trips are submitted for approval within agreed timescales.
- Ensure that all activities are reviewed and evaluated, that good practice is shared, and that any issues are followed up.
- Ensure any accidents, incidents or near miss events are recorded by the provider, or where school is leading or managing the activity, the school.
- Confirm that accident forms completed by school staff include details of the investigation.
- Ensure that accident forms are sent onto the Trust in line with the Accident Reporting Procedures and retained securely in school.

5. THE VISIT LEADER

The visit leader has overall responsibility for the supervision, conduct and safety of young people on the visit. They will not lead an activity or visit unless approved to do so by the Headteacher. Furthermore, they must not complete activities outside the scope of their own competence and training.

Depending upon the nature of the visit, visit leaders must:

- Ensure that the visit has clear aims and objectives.
- Ensure the advice in this guidance document is followed during planning and delivery.
- Ensure the visit location, or provider, meets the need of the visit, and will facilitate the aims and objectives.
- Assess the risks involved in the visit and ensure that the visit is planned appropriately.
- Ensure that any transport arrangements are sufficient, meet the needs of the visit and have been risk assessed.
- Ensure they use a planning checklist to help them confirm all aspects of a trip have been appropriately planning and developed. (Appendix 1)
- Consult with the schools EVC to ensure the visit is planned and approved in good time.
- Clearly define and communicate the roles and responsibilities of the deputy leader, 24-hour emergency contact, staff and helpers
- Take a lead on risk management, involving relevant staff and volunteers, to ensure they understand what they need to do. Involving participants wherever appropriate
- Have alternative plans (a 'Plan B') in case the itinerary needs to be changed.
- Ensure that parents have been fully informed, and that parental consent has been obtained as necessary.
- Have an effective emergency plan and depending on the visit type develop and emergency action visit card. For the 24-hour base contact and themselves Appendix 3
- Ensure that, if the visit leadership team includes someone with a close relationship to a member of the group, this is managed to avoid any possible compromise on effective supervision.
- Provide formal briefings (relevant to the levels of risk) to staff, parents, helpers and participants.
- Ensure that participants are effectively supervised throughout the trip.
- Confirm downtime, lunch periods, dormitory time, site security is considered during the risk assessment process.
- Have a list/register of all group members and conduct regular headcounts.
- Ensure that child protection issues are addressed, that good safeguarding practice is followed and that adults are appropriately vetted and checked.
- Ensure that participants and parents are aware of expected standards of behaviour, and any consequences if these are not met.
- Ensure that participants bring suitable clothing and footwear.
- Ensure there is access to first aid at an appropriate level.
- Ensure that any medication needs of participants are addressed.
- Encourage participants to maintain good hygiene during a visit, such as washing hands after visiting the toilet and before eating.
- When necessary, advise participants about the dangers of over-exertion and dehydration in hot weather, and ensure they have access to wholesome drinking water and use appropriate sun protection.
- Confirm adequate insurance is in place for the activity.
- Ensure any accidents, incidents or near miss events are recorded by the provider, or where school is leading or managing the activity, the school.
- Confirm that accident forms completed by school staff include details of their investigation.
- Ensure the accident form is passed to the EVC and Head teacher so this can be signed off and passed to the Trust if needed.
- Review all aspects of the visit, both during and after the event

6. DEPUTY VISIT LEADER

The deputy may need to take over from the visit leader should they become unwell or have to leave the visit due to another emergency. They must be fully versed with the details of the trip and hold sufficient authority to ensure staff and young person's follow their direction.

7. 24-HOUR EMERGENCY BASE CONTACT

When trips take place, outside the school day, there must be a nominated 24-hour base contact ready to provide support, to the visit leader, staff and participants on the trip. This contact must:

- Be contactable and available for the full duration of the visit, 24 hours a day.
- Be provided with or have access to participant details, emergency contact numbers and other information relevant to the trip.
- Must also ensure they have a copy of the emergency action visit card. Appendix 3
- Have the authority to make safety-based decisions.

8. ACCOMPANYING STAFF/ HELPERS/ VOLUNTEERS

These individuals normally have agreed support roles during a visit. For example, they might be an inexperienced or experienced member of staff, a parent, a Governor etc. The OEAP outlines the roles and responsibilities of those supporting the visit leader. It is important that all accompanying staff and helpers receive a suitable briefing from the visit leader before the trip. The briefing should be relevant to the trip and the young person's needs. An example list can be found in **Appendix 1, The Planning Checklist**

The following links offer guidance on OEAP advised roles for helpers and volunteers
<https://oeapng.info/download/1128/> <https://oeapng.info/download/1792/>.

Schools must ensure that all leaders/helpers (including volunteers) follow the school and Trust procedures regarding DBS checks. Any concerns should be raised to the Trust Safeguarding Lead.

9. PARTICIPANTS

The visit leader must provide participants with a briefing relevant to the trip or visit, this might include.

- The need to follow the instructions of the visit leader, other teachers and adults charged with their supervision.
- Expected behaviours and sanctions, the need to be responsible for their own safety and that of others.
- Use of mobile phone protocols
- What to do if they feel unwell or notice anything of concern
- Details of trip related risk
- Stranger danger
- Approximate itinerary
- Emergency procedures, what to do if separated from the group etc.

Any other relevant issues should be added to the briefing.

Participants should be reminded, if their behaviour is considered to be a danger to themselves, or others they could be excluded from the visit. However, all that is reasonably practicable should

be done to manage the participants behaviour so that they can attend where possible. The school must follow their relevant behaviour policies when deciding on this action. Where needed the Headteacher might wish to speak to the Trust Education staff for additional advice.

The OEAP offers a model code of conduct that can be amended for use in different school settings.

<https://oeapng.info/download/1250/>

10. APPROVAL OF VISITS:

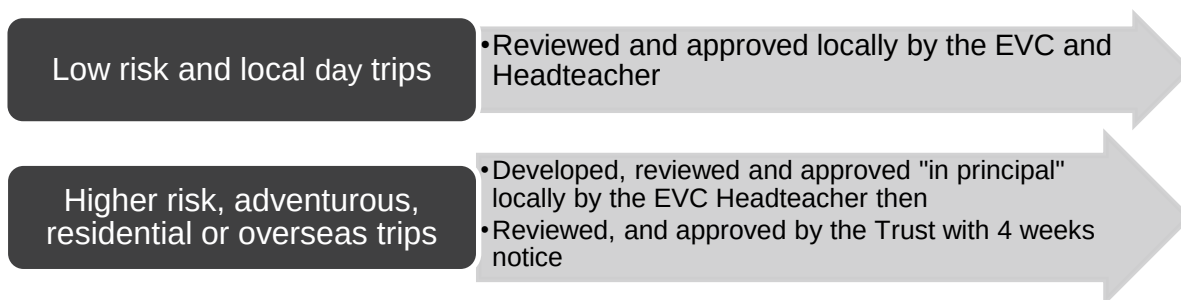
All Trust schools undertaking educational visits **must** follow the system of approval outlined in this policy.

- All visits must be **approved in principle, before development** by the headteacher. The approval process can be developed by the school. As the process should be relevant to the level of risk and the type of visit delivered. The process must specify the timeframe for approval, how the request should be made (email or in writing) and should include information similar to the box to the right.
- All visits must be recorded on EVOLVE. this will provide good evidence of planning and approval.

Example information required. Approval in principle:

1. Aims and objectives of the visit.
2. Will the visit include residential, adventurous or overseas activity
3. Location, providers to be used
4. Proposed activities and will any activity be led by

The Trust expects the EVC and Head Teacher to exercise appropriate professional judgement when approving visits and expect advice to be sought as needed from the Trust Health and Safety Manager.



The Trust delegates all aspects of the approval to the Head Teacher for all low-risk visits not listed as requiring Trust approval. This delegation is conditional upon compliance with this policy.

Specific approval from The Trust is required for the following activities, section 9 offers more details:

- Residential visits
- Overseas visits (including expeditions)
- Adventurous activities (see definition below)
- Duke of Edinburgh's Award expeditions
- Ski trips
- Open water swimming

All visits must be developed by the visit leader, fully reviewed and quality checked by the EVC. Once the EVC is happy with the quality of the trip they will approve the visit and it will be sent onto the headteacher for sign off. **Adventurous, residential and overseas** visits will have a final quality check provided by the Trust.

Details of all educational visits that require Trust approval must be approved by EVC and headteacher and sent to the Trust **at least 4 weeks before the visit**.

Partially completed visits **must not** be sent onto the Trust for approval at any time, even due to timescales. These trips will not be approved, and insurance cover could be affected.

11. DEFINITION OF ADVENTUROUS

The following activities are regarded as 'adventurous' and require Trust approval (please note that this list is not exhaustive), if in doubt the EVC can speak to the Health and Safety Manager.

- All activities in 'open country.' Any activity (hill walking, mountaineering, fieldwork, biking and so on) on moorland (open uncultivated land) at any height or mountainous ground over 600 metres above sea level **or** at any height where it would take 30 minutes to reach an accessible road or refuge.
- Swimming (all forms except publicly life guarded pools)
- Camping (including Duke of Edinburgh's Award Expeditions)
- Canoeing/kayaking/rafting/improvised rafting
- Sailing/windsurfing/kite surfing
- Use of powered safety/rescue craft
- All other forms of boating (except commercial transport)
- Water skiing
- Snorkel and aqualung activities
- Rock climbing (outdoor) and related mountaineering activities, river/gorge walking or scrambling
- Some cross-country events (completed as per national guidance. For example, schools' Athletics association or Association for Physical Education guidelines)
- Coasteering/coastal scrambling/sea level traversing
- Underground exploration
- Off-site mountain biking and lowland trail riding
- Road cycling (except as part of Bike ability, cycling proficiency or similar programme)
- Skiing, snowboarding and related activities.
- Air activities (excluding commercial flights)
- Horse riding
- Quad bikes, off-road buggies
- High level ropes courses
- 'Extreme' sports
- Water based activities.
- Adventurous activities with the armed services
- Indoor sky diving
- Nordic Walking
- Ice Fishing
- Snow mobile activities
- Bushcraft (higher risk fires, knives, or sharps)

Any other activities involving skills inherent in any of the above or that may contain a similar level of risk to participants or staff.

The following visits are **not regarded as adventurous** and therefore do not require Trust approval. These activities must however be supervised by a member of staff who has previous relevant experience and/or who has been assessed by the EVC or Head Teacher as competent to supervise the activity:

- Walking in parks or non-remote country paths
- PE matches before or after school (supervised as part of a managed event)
- Field studies (unless in the environments defined as adventurous)
- Swimming in publicly life guarded pools
- Theme parks (for example, Alton Towers, Adventure Valley and so on)
- Tourist attractions
- Pedal go-carts, motorised go-karts at commercial venues
- Paint balling and laser quest type activities
- Archery clubs
- Indoor rock climbing/bouldering provided by a leisure centre or similar commercial venue.
- Ice rink skating
- Farm visits
- Local traffic surveys
- Museums, libraries etc
- Physical education and sports fixtures
- Dry ski slope activities
- Tubing
- Bushcraft (low-risk no fires, knives or sharps)

Water margin activities - such as walking along a riverbank or stream (including paddling in the sea), collecting samples from streams and ponds, or paddling in gentle, shallow (up to the upper calves) water. If the activity exceeds this definition the activity is water based and therefore adventurous. Note staff involved in water margin activities should be conversant with the guidance contained in the OEAP publication '[Group Safety at Water Margins](#)'. They must be content their activity is low risk.

12. COMPETENCE TO LEAD

The single most important factor in ensuring the safety of participants involved in an educational visit or activity is the competence of the visit leader.

The EVC and Head Teacher should therefore consider the following when assessing the competence of a member of staff to lead a visit.

- What is the leader's reason for undertaking the visit?
- Does the leader have the skills to complete the role? (Visit leaders wishing to lead a specific adventurous activity **must always** have relevant qualifications and experience)
- Is the leader an employee?
- Can the leader provide hard copies of relevant training certificates (where needed)? Copies will always be retained and should preferably be added to staff records on EVOLVE.
- Does the leader have relevant first aid qualifications (if needed)?

- Has the leader a real sense of responsibility, extending beyond the teaching of the subject to concern for the participants pastoral care and empathy?
- Does the leader possess the necessary organising ability?
- Is the leader competent in risk assessment and risk management?
- What experience has the leader in leading, or assisting in the leading of similar visits or activities?
- What experience has the leader of the environment and geographical area chosen?
- If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- Is the leader aware of, and able to comply with, all relevant guidelines?

The school must contact the Trust if there is doubt regarding the competence of a member of staff to lead an educational visit. The Trust will contact an independent technical expert if needed to assist in making decisions on competence to lead, especially for adventurous activities.

13. SUPERVISION & STAFFING RATIOS

Participants on visits must be adequately supported and supervised at all times.

The level of supervision should be based on **risk assessment** for the specific visit, and will be determined by such factors as:

- The type, risk, and duration of the activity
- The nature and requirements of individuals within the group, including consideration of special and additional needs.
- The experience and competence of staff and other adults.
- The supervision plans. Direct, indirect or remote.
- The venue, time of year and prevailing/predicted environmental conditions.
- The contingency or Plan B options.

We expect the visit leader, EVC and Head Teacher to make a professional judgement regarding the appropriate level and suitability of staffing for every visit. A visit must not go ahead where any of the above persons are not satisfied that an appropriate level of supervision exists.

The following ratios are therefore **only a guide and offer minimum ratios** and do not overrule or replace professional judgement of the visit leader, EVC and Head Teacher

Lower Risk Activities (where the risk is similar to everyday life)	Number of Adults to Young persons
Nursery and Foundation Stage young persons	<u>EYFS Foundation Stage guidance must be followed.</u>
Key Stage 1 young persons	1 adult to every 4 - 6 young persons
Key Stage 2 young persons	1 adult to every 10 - 15 young persons
Key Stage 3,4, & 5 young persons	1 adult to every 15 - 20 young persons

Higher Risk/Adventurous/Residential Visits	Number of Adults to Young persons
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Key Stage 1 young persons	1 adult to every 2 - 4 young persons
Key Stage 2 young persons	1 adult to every 6 - 10 young persons
Key Stage 3,4, & 5 young persons	1 adult to every 10 - 15 young persons

Remember - The visit leader is responsible for the group at all times.

As such they should develop a supervision plan. The time spent on this and the level of detail, should simply be based on the level of risk faced by young persons and staff.

It is good practice for each supervisory adult to have the following:

- A clear plan of the activity to be undertaken and its educational objectives.
- A reasonable knowledge of the young people involved, including any **special educational needs, medical needs, or disabilities**.
- Prior knowledge of the venue, any area of risk and out of bounds area
- A list/register of all group members and who they are responsible for supervising.
- Details of how the groups will be checked to ensure no one is missing (head count etc.).
- Details of how they can contact the visit leader if help is required.
- How to monitor the appropriateness of the activity, the group safety and the suitability of the prevailing weather conditions and so on.
- An understanding of emergency procedures and access to a first aid kit.
- Details of how first aid support will be provided.

Visit leaders should provide a full briefing to accompanying adults prior to the visit.

14.DOWN TIME

Many accidents/incidents that occur during a trip, occur during free time. Visit leaders should ensure that children and young people continue to be properly supervised during 'down time.' This includes, before, between and after activities, including lunch periods and the evenings on residential visits and so on. Where possible this should be added into the risk assessment for the trip and uploaded onto EVOLVE.

15. SUPERVISION TYPES

Visit leaders should ensure the right supervision plan is used for their trip or visit. The type of visit will depend on the aims and objectives of the visit, and the assessment of risk. We would expect trip/visit activities in a primary school to be direct supervision.



Direct

Occurs when participants remain within sight or hearing of a leader at all times.

Indirect

occurs when participants are given the freedom to explore an environment or engage in an activity away from direct supervision but within clearly identified and agreed boundaries, for example:

- Small group or individual work within a gallery, museum, cultural or historic site
- Time between more structured activities during a residential visit, sometimes referred to as downtime

Remote

Remote Supervision occurs when participants work at such a distance that direct supervision would take some time to be re-established (e.g.: during a remotely supervised adventure walk; young people travelling independently to a venue; an orienteering activity; a Duke of Edinburgh Award expedition). For this form of supervision to be appropriate a decision must be made that the participants no longer need an adult leader but are capable of operating independently.

16. ORGANISING REMOTE SUPERVISION

If the aim of visits for young people is to encourage independence and investigative skills, some of the time on visits may be supervised from a distance. The visit leader must establish during the planning stage, whether the young people are competent and mature enough in remote supervision situations and must confirm parents have agreed to this part of the visit. The visit leader must ensure:

- Young people are made aware of ground rules and are adequately equipped to be on their own or in a small group.
- Young people have contact telephone numbers and suitable means of contacting the visit leader as needed.
- They have maps, plans and other suitable information for them to act effectively and know how to summon help.
- If the visit is abroad young people have a help card with suitable, but non personal information to offer local police to get support.
- In enclosed areas, such as theme parks, young people know where, and when to meet supervising adults and details of out of bounds areas.

The supervising adults must always have emergency plans for this type of activity.

17. REMOTE SUPERVISION DURING ADVENTUROUS ACTIVITIES

This type of supervision is sometimes required during Duke of Edinburgh's Award Expeditions. The training given to young people must meet the requirements of the award and training should cover the remote supervision and emergency planning. The instructor should have appropriate qualifications and experience to provide clear guidance for each activity and to check the participants understanding is accurate.

Before the expedition takes place, the visit leader should be satisfied that young people have acquired the necessary skills and have the necessary experience, confidence, physical ability, and judgement to be left without direct supervision. Final checks on communication and emergency planning should be made before groups leave the base.

Note: For all educational visits and off-site activities the visit leader remains fully responsible for all children and young people, even when not in direct contact with them.

18. TEACHERS AND OTHER EMPLOYEES CHILDREN ACCOMPANYING VISITS

It is acknowledged that some employees could not help in educational visits unless their own children accompany them. However, visit leaders and helpers who bring additional children will have potential conflicts of responsibility, which could have consequences for supervision levels and group safety. It is therefore essential that EVC's and headteachers consider the implications of such requests and those arrangements do not compromise the safety of other group members. Where agreements are made to allow staff to bring their own children on a visit, the agreement must be made in writing with proof that the insurance provider will cover the participant during the trip. Resulting significant risks must be added into the planning and risk assessment.

Possible control measures may include.

- Considering and using findings from case studies where serious issues occurred due to staff children attending an educational trip [Glenridding Beck](#)
- Ensuring the activities are age appropriate for all participants including the accompanying children.
- Considering safeguarding matters
- Considering the wider impact on participants and the objectives of the trip or visit
- Arranging supervision groups so the parent does not directly supervise their own children.
- Ensuring the group with the accompanying child is smaller.
- Ensuring emergency planning covers the needs of accompanying children.

The headteacher is ultimately responsible for confirming that the trip has been effectively planned and that visit safety has not been compromised due to the inclusion of an employee's child.

19. INFORMATION FOR PARENTS, GUARDIANS AND CARERS:

Visit by visit written consent from parents is not required for young persons to take part in the majority of off-site activities organised by a school (with the exception of Nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required.

A 'one off' consent form can be signed by parents annually. This will cover low risk day activities. The Trust has an example template based on the DFE example consent form Appendix 4

Written consent is requested for activities that need a higher level of risk management or those that take place outside school hours. This includes adventure activities, off site sporting fixtures outside the school day, residential visits, and all off site activities for nursery schools which take place at any time (including during school holidays or at the weekend).

Further guidance on parental consent can be found in the [OEAP Document 4.3d Parental Consent](#).

Information provided to parents providing details of a trip will depend on the type of visit and risks faced. The information might include.

- Dates.
- Objectives of the visit or activity.
- Times of departure and return, including location for meeting parents.
- Method of travel including name of any travel company.
- Accommodation with address and telephone number.
- Emergency contact arrangements at home and away if all young people are not at one centre. Consider how to best contact a large group of parents, for example via school text message service.
- Name of visit leader and accompanying staff.
- Names and status (for example, parent) of other accompanying adults who will exercise some responsibility during the visit.
- Details of activities planned. Any activity involving special hazards must be clearly specified.
- Requests for relevant information. Medication, illness, dietary needs, swimming ability
- Charges or voluntary contributions; what they cover and do not cover.
- Methods of payment and cancellation arrangements.
- Insurance for the group members in respect of baggage, personal accident, cancellation, and medical cover. Send a photocopy of the insurance schedule to all parents or state that a copy of schedule may be obtained from the visit leader.
- Clothing/footwear and other items to be taken. Prohibited items.
- Money to be taken.
- Code of conduct; details relating to the standard of behaviour expected from the group during the visit; including for example, rules on general group discipline, smoking, sexual behaviour, illegal substances, and alcoholic drinks.
- Parents should have sufficient information to give informed consent and give written consent for emergency medical treatment.

Schools must ensure they have a process for parent communication.

Visit leaders should appreciate the benefits of inviting parents to a planning meeting, particularly where a residential experience is involved, visits abroad or where the activity constitutes a 'new challenge' for the group members or the school. There is then the opportunity for all involved to be fully informed and to raise issues which may be difficult to put down in writing.

20. SAFEGUARDING:

Safeguarding procedures should be considered as part of the planning process with additional consideration for residential visits.

Visit leaders, EVCs and Headteachers must be confident the school/ Trust safeguarding policies and processes are followed on every school trip or visit. Any issues must be raised and acted upon immediately.

21.DISCLOSURE AND BARRING SERVICE (DBS) CHECKS:

Establishment staff will normally require an enhanced DBS check with barred list check as a result of their day-to-day work.

Schools must ensure that all leaders/helpers (including volunteers) follow the school and Trust procedures regarding DBS checks. Any concerns should be raised to the Trust Safeguarding Lead.

22.EQUALITIES ACT 2010 AND MEDICAL NEEDS

It is unlawful for any establishment to discriminate against disabled participants (current and respective) because of their disability, without justification – which, must be both material and substantial to the particular case.

Schools are required to make reasonable adjustments to avoid disabled participants being placed at a substantial disadvantage. However, the Equalities Act does not require responsible bodies to place employees or participants at risk in order to make reasonable adjustments.

In all cases compliance with the Equalities Act must not be achieved by breaching the Health & Safety at Work Act etc 1974, for instance, reasonable adjustments must not place employees or others at unacceptable risk of injury or ill health.

Visit leaders and other adults should be aware of all the children and young people's medical needs and any medical emergency procedures. If required, a member of staff should be trained in administering medication and to take responsibility in a medical emergency. If the young person's safety cannot be guaranteed, it may be appropriate to ask the parent or carer to accompany a particular young person.

Many adventure and educational centres now employ or have access to staff who will collaborate with schools to ensure all their young persons' needs are catered for in a meaningful and safe way, which also encourages challenges and independence. If this service is needed, schools should outline their requirements to the provider as soon as possible.

Schools should always ensure safety critical information is shared with providers so that their stay is as safe as possible. Where needed, enquiries should be made at an early stage about access and facilities for securing wheelchairs on transport and at residential centres.

The visit leader should check that any additional insurance policy taken out covers staff and young persons with pre-existing medical needs. All medical conditions should be declared to the insurance company regardless of whether they have been specifically requested. Failure to declare a medical condition will often invalidate medical/travel insurance.

23.FIRST AID:

The visit leader should make a professional judgement on the level and type of first aid required for each visit. The needs of staff and participants must be considered. This decision could be influenced by factors such as the environment and proximity to emergency services or professional care. However, as a minimum, we recommend that for all visits there should be a responsible adult with a good working knowledge of first aid appropriate to the environment. In the case of Nursery and Foundation Stage young persons it is mandatory that at least one person in attendance on the visit has a current paediatric first aid certificate in line with EYFS framework.

The Emergency Paediatric First Aid certificate is a basic qualification which may be suitable for routine urban visits; however, risk assessment may indicate that a higher-level qualification is appropriate in circumstances where it is likely that access by emergency services may be delayed.

The Trust expects a first aid kit, which is appropriate to the trip and needs of the group, to be carried on all trips and off-site visits.

24. ACCIDENTS ON EDUCATIONAL VISITS:

Accidents to be reported without delay to The Trust

Employees

Type of accident -

Death or specified injuries including:

- Fractures, other than to fingers, thumbs, and toes
- Amputations
- Permanent sight loss or reduction in sight
- Crush injury causing damage to the brain or internal organs.
- Serious burns (including scalding)
- Scalping which requires medical treatment.
- Loss of consciousness caused by head injury or asphyxia.

Resuscitation or admittance to hospital 24hrs

Non-employees including Children and young people, Clients & Volunteers.

Type of accident -

If the person in our care is killed or taken directly to hospital for treatment during the visit regardless of how they were transported to hospital.

Accidents on educational visits are less common than most people think and there has been no evidence that accidents are more common on visits than they are in everyday school life. The Trust accident reporting procedure is relevant on school trips and must be followed.

All accidents (where Trust staff are managing the activity) should be recorded on The Trust's Accident Incident and near miss reporting system and submitted to The Trust Health and Safety Manager.

Should an accident occur, that would be reportable to the Health & Safety Executive (see table above), The Trust should be notified without delay by telephone or email, and the Trust will report to the HSE.

25. RISK PROTECTION AGREEMENT (RPA) SCHEME

The Trust belongs to the Risk Protection Agreement (RPA) scheme. This includes travel protection.

Headteachers should ensure they are aware of the trip/visit cover provided by the RPA and the exclusions. Where needed, if they want additional information, they should contact the Trust.

Consideration should be given to:

- Cover when staff lead trips.
- Cover for staff taking their own children on a visit.
- Support for staff and participants with additional requirements

The Headteacher should always ensure visit leaders and the base contact have access to the Emergency Assistance Helpline

Visit leader, in conjunction with the EVC/Head Teacher must be fully satisfied that adequate insurance cover has been obtained before approving any visit.

26. TRANSPORT AND TRAVEL ARRANGEMENTS

Parents and carers should be made aware of the intended form of transport to give fully informed consent.

Guidance for Hiring Coaches and Minibuses:

Local Journeys

The following are a number of simple checks that can be conducted which will assist visit leaders in deciding whether an operator is suitable to carry out their trip:

- Complete due diligence quality checks (are other schools happy with the service)?
- Confirm that the operator has a current operator licence by completing a simple online UK licence check. [Check vehicle operator licences as an enforcement body - GOV.UK \(www.gov.uk\)](http://www.gov.uk)
- Does the operator check the driving licence of their drivers at least annually?
- Does the operator have a procedure that will provide a contingency plan should the coach break down during the trip? Ask for details if in doubt.
- Are drivers first aid trained and where do they store the first aid box?
- Does the company have a risk assessment for their journeys? Ask for a copy.

Long Distance and Continental Journeys by Coach

The following are a few simple checks that should be conducted on long distance and continental journeys:

- UK - confirm that the operator has a current operator licence by completing a simple online UK licence check [Check vehicle operator licence as an enforcement body - GOV.UK \(www.gov.uk\)](https://www.gov.uk/check-vehicle-operator-licence)
- If booking through a tour company, ask who the coach operator will be. Tour companies do not operate their own coaches but use sub-contracted coach operators.
- Confirm if the tour company conducts 'quality audits' on the coach operator they have booked for your trip? Ask for a copy. If not, then ask a few simple questions. Keep a note of the responses or ask the tour company to provide the information by email.
- Obtain a copy of the operator's licence and insurance details. For continental trips, operators must have an international operator's licence – Do they have one?
- Does the operator check their driver's licence at least annually?
- Will the driver(s) of your tour be DBS checked?
- Does the operator have a procedure that will provide a contingency plan should the coach break down during the trip, particularly on the continent? Ask for details if in doubt.
- On a long-distance journey, will the driver comply within EU driver's hours regulations? For long journeys, operators may use a feeder driver for the first part of the journey. Will the main driver(s) have had the statutory hours of rest before driving the main section of your trip?
- On continental journeys, if you are unsure of the capability of the operator ask for some examples of previous trips operated.
- Ask for testimonials from other schools.

These simple checks will give you an indication of the standard of the company which you are going to use for your trip. They will also enable you to satisfy yourself as to whether your driver is qualified, insured and will be sufficiently rested before carrying out your journey.

School Minibuses

Some schools will have their own minibus that certain staff can use:

- The headteacher must ensure the school has a minibus or driving at work policy.
- The policy should detail how school will confirm which staff will be authorised and insured to drive the minibus.
- Someone on school site must be tasked by the headteacher with the check of driver's licences and the confirmation that staff are authorised to drive a minibus.

- Someone on school site must be tasked with ensuring the vehicles are serviced and maintained as per the legal requirements, that pre and post use checks are completed. Keys must be kept securely and must only be given to those authorised to drive.
- The EVC must confirm that the minibus is insured for all the trips and visits that the school will complete.
- Drivers must possess a current, full UK driving licence appropriate for the vehicle (category B + D1 – minibuses over 8 passenger seats)
- Drivers must be over 21 years of age and have been driving for longer than 2 years.
- Drivers must be a volunteer and no profit made as part of the journey.
- Seat belts must be fitted to all forward-facing seats and used at all times the vehicle is used.
- A first aid box and fire extinguisher must be carried on the vehicle.
- A risk assessment must be conducted prior to all journeys.
- Drivers must take the minibus on a local drive with no passengers the first time they use it, so they can become familiar with the controls.
- Drivers must complete a pre/post use check and complete a checklist and logbook.

Transport in Minibuses <https://oeapng.info/download/1164/>

Supervising minibus passengers <https://oeapng.info/download/1194/>

Staff or parents transporting young persons in their own vehicles.

The OEAP provides clear advice where headteachers agree that staff can transport young people in their own vehicles. There should be recorded procedures developed by the headteacher and EVC which must be communicated to all staff. Risk assessments must be developed, and the National guidance must be followed. Staff should have “business user” clause as part of their personal insurance policy and this should be checked by the EVC. Records must be kept.

Consideration would need to be given to accompanying adults, who would sit where in the vehicle, safeguarding, action to be taken should a road traffic accident take place, mobile first aid kits etc.

Where parents become involved in transport for trips, visits and activities, schools should not, become involved or make any arrangements. OEAP guidance must always be followed.

Travel in private cars and parents providing transport [4.5c-Transport-in-private-cars \(2\).pdf](#)

27. USE OF EXTERNAL PROVIDERS

Schools will regularly employ other organisations, to provide an element of competent instruction, supervision, and support on educational visits. The Trust for Learning Outside the Classroom has developed a badging scheme for provider organisations, which is respected by the DfE and the OEAP

28. LEARNING OUTSIDE

As a result schools using providers must confirm where possible they hold a Learning Outside the Classroom (LOtC) Quality Badge. If the provider does not hold an LOtC badge, the visit leader must send an External Provider Form (EPF) (appendix 2). This must be completed by a senior member of staff (working for the provider). The document once returned must be assessed by the visit leader. They should then confirm to the EVC, that they are happy with the responses and wish the visit to continue. The visit leader is responsible for this due diligence check at all times. The EVC and Headteacher will provide support and final authorisation via EVOLVE. Many schools prefer to use a LOtC provider where possible.

Where an EPF is required, this should be sent to the external provider well in advance of the proposed visit and before any contractual agreement is signed or financial commitment is made.

An EPF is **not** required for:

- Establishments/venues which hold a Learning Outside the Classroom (LOtC) Quality Badge
- Youth hostels where accommodation only is used.
- Hotel, B&B accommodation
- Camp sites
- Museums, galleries, theatres and so on
- Tourist attractions
- Theme parks for example, Alton Towers and similar
- Coach, train, or airplane companies
- Swimming pools (lifeguarded UK)

An EPF is required for the following if they do not have a LOtC badge.

- Ski companies
- Activity centres
- Horse riding centres
- Educational tour operators
- Overseas expedition providers
- Climbing walls (where instruction is provided by climbing wall staff)
- Freelance instructors of adventurous activities
- Youth hostels where instruction is provided.
- Voluntary organisations, for example, scouts where instruction is provided.

Completion of the EPF does not necessarily signify that the venue meets the needs of a group. A pre-visit and further information, such as references, should also be used to judge a provider's suitability. Information on whether providers hold the LOtC Quality badge can be found on the LOtC Website, with the school competing a basic online check.

If the external provider makes any alterations to the wording of the form or is unwilling to comply, then you must discuss this with the provider and if necessary, The Trust Health and Safety Manager.

Always upload a copy of the completed EPF to the EVOLVE submission. This is the school's proof of due diligence checks.

29. RESIDENTIAL VISITS:

All residential visits must be submitted for Trust approval, using EVOLVE, at least 4 weeks before the visit is due to take place.

An EPF (appendix 2) must be completed if there is an element of instruction, staffing or guiding as part of the agreement with the accommodation provider, where they do not hold the LOTC Quality Badge.

Mixed Groups should, where possible, be accompanied by at least 1 male and 1 female member of staff. Where this is not possible, OEAP guidance must be followed and the EVC and Headteacher must give approval. Risk assessments must cover how any pastoral or safeguarding matters will be handled. The Trust Safeguarding lead may request further information.

On arrival it is advised that staff check out the accommodation, rooms, campsites and so on and report any damage to the head of the centre/manager before young person's access the rooms.

Teachers should be accommodated on every floor where there are children or young people.

In the absence of 24 hours staffing of hotel/hostel reception areas, external doors and windows should be made secure to prevent unauthorised visitors or intruders.

All staff and young people should be aware of the emergency procedures and escape routes in the event of fire. The Trust expects providers to offer a drill at the start of the visit. The visit leader must ensure this is completed.

30. PRELIMINARY VISITS

If the residential accommodation has not been used before, a preliminary visit is strongly recommended. If this is not practical, for example due to distance, the visit leader should make sufficient enquiries with the accommodation to be satisfied that it will be suitable for the group involved.

31. VISITS ABROAD

Visits abroad provide valuable and rewarding educational experiences. Such visits require detailed planning and preparation. Visit leaders should seek to ensure they use the services of a reputable tour operator experienced in group travel. Air travel organisers may be licensed through ATOL (Air Travel Organisers License) for all or part of a package. This licence is legal requirement and provides security against a licence holder going out of business. It is recommended that establishments use tour companies which are members of a Department of Trade approved bonding body, such as ABTA (Association of British Travel Agents) or AITO (Association of Independent Tour Operators). Ensure you have ready access to your insurance company telephone number. The Package Travel Regulations 1992 may apply.

Where schools independently provide a package, they should ensure they act within the regulations.

In addition to the Trust planning checklist appendix 1 visit leaders should:

- Ensure the EPF (appendix 2) is completed, where required, if there is an element of instruction, staffing or guiding as part of the agreement with the tour operator.
- Identify whether there are medical requirements imposed by the country to be visited.
- Ensure a [Global Health Insurance Card](#) is obtained for all visits to member countries of the European Union.
- Ensure the group has comprehensive travel insurance covering all proposed activities.
- Enquire about insurance cover should a parent need to travel out to the resort as a result of an accident/incident involving their child. Some policies provide cover for only 1 parent to travel whilst others will pay for both parents. These details must be shared with parents prior to the departure of the group.
- Ensure all children and young people, teachers and accompanying adult's passports are current and suitable to enter the destination country.
- Know the international dialling code in the event of a serious accident or the emergency contact needs to be informed.
- Make regular contact with the school throughout the visit to keep contacts informed of significant events.
- Confirm an emergency contact at home/back at base who holds a valid passport and could travel out to the area to support the visit leader in the event of an emergency.
- Brief children and young people about any local hazards and emergency procedures, including the use of telephones.
- Confirm risk assessments cover all activities, and times, school staff are responsible for significant hazards.
- Discuss any local customs and cultural issues.
- Agree codes of conduct with children and young people.
- Check visa and passport requirements including those children and young people classed as non-UK residents. Ensure all members of the party carry the address and telephone number of the hotel or hostel in case of separation.
- Follow good practice and each child or young person should carry a card with a contact telephone number of the visit leader or residential base, to call if he/she becomes lost. Young people should be instructed approach a police official and show the card if he/she becomes separated from the group.
- Consider language ability as part of the risk assessment.
- Photocopies of passports and other essential documentation may prove useful. Copies should also be held by the emergency contacts in the UK.
- Seek advice from the Foreign and Commonwealth Office.

Visit the [Foreign and Commonwealth Office website](#) for the latest travel advice.

Approval should be sought from The Trust at least 4 weeks in advance of the visit. Visit leaders are encouraged to have a Plan B, making alternative arrangements so they are prepared should the need arise to change the itinerary due to unforeseen circumstances.

32. ADVENTUROUS ACTIVITIES – PROVIDED AT AN OUTDOOR CENTRE OR BY A CONTRACTOR

The Activity Centres (Young Person's Safety) Act 1995 and the Associated Adventure Activities Licensing Regulations 2004 are in place to ensure the safety of young people involved in adventure activities. Schools planning to visit an adventure centre, or employ a provider in the UK should check with the Adventure Activities Licensing Authority (AALA) for the organisations licence status and expiry.

AALA covers the following activities.

Climbing - climbing, sea-level traversing, abseiling, or scrambling over natural terrain or certain man-made structures requiring the use of special rock-climbing or ice-climbing equipment or expertise, gorge walking and ghyll scrambling.

Trekking/walking - going on foot, horse, pony, pedal cycle, skis (not piste), skates or sledges over moorland (open uncultivated land) at any height, or on ground over 600 metres above sea level when it would take 30 minutes to reach an accessible road or refuge. Off-piste skiing also requires a licence.

Caving - the exploration of underground passages, disused mines, or natural caves which requires the use of special equipment or expertise.

Water Sports - sailing, canoeing, kayaking, rafting, and windsurfing, on the sea, tidal waters including estuaries, the tidal reaches of rivers, sea lochs and harbours, inland waters at a location where any part of those waters is more than 50 metres from the nearest land, and turbulent inland waters such as weirs, rapids, waterfalls, and fast flowing currents. Rowing is exempt.

All AALA licence visits require approval via The Trust

33. ADVENTUROUS ACTIVITY LEAD BY A SCHOOL'S OWN STAFF:

Single school groups consisting of children and young people under 18 years of age are exempt from licensing regulations and therefore do not require an AALA licence. However, the law expects that teachers wishing to lead adventure activities themselves, follow the AALA criteria for managing safety during adventurous activities, and to ensure they have suitable training, experience, qualifications and first aid to lead this type of learning.

Teachers will, before they can consider leading this type of visit, be asked to complete an Activity Leader Form (ALF) and to submit this to the Headteacher and the EVC **at least 6 weeks before the activity**, with their original award certificates, a proposal of the activity they wish to complete and answers to the questions below.

- Does the leader need any specialist training or qualification to complete the visit or activities (often needed for higher risk staff lead adventurous or sport activities)?
- Does the leader possess appropriate qualifications?
- Can the leader provide the original training certificates?
- What experience of the activity, and leading others during the activity does the teacher have?
- Does the leader need a specific first aid qualification to lead this group (often needed for higher risk, staff lead, adventurous activities? For example, outdoor first aid, wilderness

first aid? Specific first aid training is often needed by adventurous activity National Governing Boards (NGB) as part of the validity of the award?

The proposed leader must have their own account on EVOLVE (obtainable via their EVC). In the 'My Details' section of their account the leader must enter details of any adventure activity awards held, including dates, and upload copies of these awards and certificates.

Staff must always get the approval of the Headteacher to lead an adventurous visit. The Trust Health and Safety Manager must also agree to the teacher leading the activity as part of the approval process, in rare cases specialist advice might be needed from an approved Outdoor Educational Advisor.

Recording activity leader information onto EVOLVE and developing the Trip information.

The screenshot shows the EVOLVE web interface. At the top, there's a header with the EVOLVE logo, a user profile for Sharon Drew, and a Logout button. Below the header is a navigation bar with tabs: Resources, Add, Track, Evaluate, and Reports. The main content area is titled 'Test12 (599)' and contains a yellow information box stating: 'Useful information for schools. Answering the questions in the "type" section accurately, will open up another set of questions relevant to the trip or visit you want to deliver.' Below this is the 'Type' section with a table of questions:

Type	Yes	No
Is this an on-site activity?	☐	☒
Is this an Overseas visit?	☒	☐
Is this a Residential visit/activity?	☒	☐
Will this event include an Adventurous Activity led by an External Provider?	☐	☒
Will this event include an Adventurous Activity led by a member of Trust staff?	☐	☒

At the bottom right of the form is a 'Continue' button.

Once approval is given to lead the visit, the visit leader should start to register the trip on EVOLVE as usual. The question "will this event include an adventurous activity lead by a member of school staff" must be ticked as yes.

EVOLVE will ask for an Activity Leader Form (ALF) to be uploaded and will request further details regarding the proposed venture (for example, dates, venues, participant numbers and so on). The ALF will then be embedded within the approval request for that particular visit.

On receipt of an approval request (and embedded ALF), The EVC, Head teacher

and Trust Health and Safety Manager will consider the proposed activity relative to the leader's stated competencies and qualifications. The visit should be fully uploaded onto EVOLVE 28 days before the visit date.

Where approval is not granted, by the Health and Safety Manager. The approval request will be returned to the EVC and Headteacher with an attached note of action needed, should they want the trip to go ahead at a future date. Where this is the case the member of staff concerned, **must not** lead the activity and the EVC and Headteacher should agree next steps.

Conditions of approval

Approval will always be subject to a requirement that the leader must operate at all times within the remit of his/her qualifications and competence, and in accordance with national governing body guidelines where these exist.

Staff leading an adventurous activity is expected to follow their planning and risk assessments, have robust plan B's and have suitable emergency procedures and equipment in place.

34. RISK ASSESSMENT

Risk assessment is nothing more than a careful examination of what could cause actual harm and suffering to people, together with an identification of the control measures necessary to reduce the risks to a level which, in the considered judgement of the person conducting the risk assessment, is deemed to be acceptable. The process is applicable to all visits. As with all areas of health and safety the Trust expects staff to adopt a sensible and proportionate approach to the management of risk while planning and undertaking educational visits.

Risk assessment training, advice and support can be provided by the Trust Health and Safety Manager. All staff acting as visit leaders should have completed risk assessment training either in person or by using the Trust training package on iAM Compliant.

There are three 'levels' of risk assessment. (Further guidance can be found in the risk assessment section of the Health & Safety Executive website.)

Generic and Venue - (normally already in place)

These will apply to all low risk, regularly completed visits, where the nature of the visit remains approximately the same and many of the controls will apply each time. Typically, schools and venues will have generic risk assessments:

- to avoid unnecessary repetition and
- to ensure that there is a consistent approach to managing risk.

Schools often develop generic risk assessments for low risk trips they complete at least annually, for example, a museum tour, a walk to church, the pantomime, a visit to a national trust property for example.

When using generic risk assessments, the visit leader must ensure that the risk assessment is.

- relevant to the proposed visit.
- The participants
- Any additional needs

The visit leaders should ensure that the controls in the generic risk assessment are in place and evaluate if this is suitable and sufficient, or if further action is necessary.

The risk assessment must be signed and dated by the visit leader when they feel it is suitable and sufficient for use.

In many cases the visit leader will review the generic risk assessment and decide this should be developed due to significant differences. This could include, medical needs, behaviours, weather, the needs of the participants or staff experience. They would then use the generic template and develop this into an event specific risk assessment. Or they might complete a new risk assessment template (see below)

Event Specific Risk Assessment - (carried out before the visit takes place)

This considers any significant hazards or risks relating to a visit that are not covered within the generic risk assessment, and should take into account the venue, activities, group, transport, plan B and so on. 'Significant' implies those hazards that could result in serious harm or affect several people. The process should identify the hazards, who might be affected by them, and the measures in place to control the risks.

Event specific risk assessments will also be completed for new or different activities or activities not previously risk assessed.

The risk assessment must be recorded (normally by the visit leader), using the Trusts risk assessment template and approved on EVOLVE by the EVC/Head before the visit takes place.

On-going - (carried out continuously throughout the visit)

The on-going monitoring of all aspects of the visit by the visit leader and other staff is the single most important aspect of risk management of visits, and hence safety. Risks should be monitored throughout the visit, and where appropriate activities must be modified or curtailed (for example, Plan B) to suit changed or changing circumstances. This is the responsibility of all involved in the visit, not just the visit leader. For example, poor weather might mean a walk now takes place more locally, or an activity takes place inside a learning area. Or lunch is eaten in a quieter location where staff can supervise more effectively.

It is not necessary to record on-going risk assessments during the visit, although notes of significant events or decisions can assist the post-visit review following an incident or accident.

An activity should only take place/continue if, in the professional judgement of the visit leader and/or supervising members of staff, the residual risk following implementation of any control measures is deemed to be acceptable.

35.WHO SHOULD COMPLETE RISK ASSESSMENTS AND PARTICIPANT INVOLVEMENT:

Staff leading the visit should always assess the activity, this is important as responsibility and accountability cannot be delegated. Although visit leaders should include other staff to help them develop their skills in the management of trips and visits.

Participants who are involved in a visit's planning and organisation, and who are well prepared, will make more informed decisions and will be less at risk. It is therefore good practice to involve participants in the risk assessment process. The HSE, Ofsted and DfE endorse this process and encourage schools to involve participants in risk assessments suitable for their age and maturity.

36.COMMUNICATION OF RISK ASSESSMENT

Relevant aspects of the risk assessment process should be shared with all staff and helpers involved in the visit, as well as participants and where appropriate parents. It is good practice to share risk assessment information during staff, parent or participant briefing where necessary.

37.EMERGENCY PROCEDURES

All schools and services should consider the need for robust emergency arrangements as part of the visit planning and risk assessment process. All staff involved in a visit should be aware of the action to be taken in the event of an emergency.

It is vital that all staff understand the first aid and emergency procedures, not just the visit leader. Particular consideration should be given to participants that have special educational needs or medical conditions.

For all higher risk visits and certainly residential, adventurous and overseas visits the EVC and headteacher should confirm the visit leader has developed and shared a completed:

Emergency help card - Visit leader' form. This must be with the visit leader/deputy at all times (see appendix 3).

Where the emergency contacts will not be at their school during the visit, a completed.

'Emergency help card - Emergency Contacts' form must be with the Emergency Contact(s) at all times.

SPECIFIC TYPES OF VISIT AND TRUST ADVICE

38. THE DUKE OF EDINBURGH AWARD:

The guidance in this document must be used when managing expeditions and other activities relating to the Duke of Edinburgh's Award.

Responsibility for Safety

The Head Teacher/Service Manager is responsible for ensuring that employees are fully qualified and experienced and hold the relevant national governing body qualification for work in the outdoors.

The qualified and experienced leader has full responsibility for the safety of the young people whilst out on expedition. Suitably experienced and competent assistant leaders and other adults should work under the direction of the visit leader and must be competent in the task they are asked to undertake.

Notification/Approval Procedures for Expeditions

All Duke of Edinburgh's Award (DofE) expeditions are regarded as 'adventurous' and require Trust approval. The DofE requirements for skills development, group sizes, training, KIT, emergency procedures and practice expeditions etc. must always be completed and recorded.

In addition, if groups venture into Duke of Edinburgh's Wild Country Areas, then the appropriate Network Co-ordinator must be notified as well as the Headteacher/EVC and Trust at least 7 weeks before the expedition.

Those organising expeditions need to be aware of the conditions and guidance in the Duke of Edinburgh's Award Handbook, Programmes File and Expedition Guide.

Details of the Wild Country Expedition Areas and Co-ordinators can be found on the [Duke of Edinburgh website](#).

39. SNOW

Snow sports (skiing and snowboarding) are regarded as adventurous activities, and the visit must also be approved by The Trust.

Visit leaders are particularly encouraged to consider the benefits of snow sports visits taking place during term time as opposed to during holiday periods. These benefits include: greater choice generally, less queuing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snow sport establishment instructors (as opposed to 'casual' instructors), greater likelihood of English speaking instructors, considerable cost savings through avoiding high season (possibly allowing more young people to participate), and so on.

It is recommended that a member of staff intending to organise a snow sport visit (but not instruct, lead, or supervise on snow) holds the Ski Course Organiser Award, and must have previously accompanied at least one educational snow sports visit.

Young people may only ski or snowboard when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snow sports establishment. Visit organisers should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.

Where a travel company or ski tour operator is providing an element of instruction, staffing, or guiding, the EPF (if they do not hold the LOTC Quality Badge) should be completed.

A member of staff intending to **lead** skiing or snowboarding (for instance, not using a ski school instructor) must:

- be qualified as below.
- have been approved by the EVC, Headteacher and Health and Safety Manager
- operate at all times within the remit of their qualifications and competence.

Skiing

The minimum qualification to **lead** skiing on snow is The Alpine Snowsports Course Leader Award (ASCL) from [Snowsport England](#) or a statement of competence by an appropriate technical adviser.

Snowboarding

The minimum qualification to **lead** snowboarding on snow is The Alpine Snowsports Course Leader Award (ASCL) from [Snowsport England](#) or a statement of competence by an appropriate technical adviser.

40. HELMETS SNOWSPORTS

An increasing number of resorts and ski schools make the wearing of a properly fitted ski helmet mandatory for young people. In some countries this is a legal requirement and in most it is strongly recommended that all young person's wear helmets for skiing and snowboarding. In this Trust we require our young persons and any staff participating to wear helmets as part of any snow sport activity

Young people and staff must not participate in off-piste activities.

Further advice on Snowsport activities is provided by the OEAP. This should be followed by the visit leader. [7.1v-Snowsport-visits-2.pdf](#)

41.OVERSEAS EXPEDITIONS

Overseas expeditions can potentially bring immense educational benefits to children and young people, and the Trust fully supports and encourages overseas expeditions that are correctly planned, managed, and conducted.

Overseas Expeditions (for the purposes of this document) are defined as those which typically take place in remote areas of the world and/or in developing countries.

The Trust will need informing of any consideration or proposal of a school to participate in this type of expedition at least 18-24 months prior to the venture.

The OEAP OEAP Overseas Expeditions (7.1q) should be referred to when the proposal is initiated (normally 18-24 months before the venture). This document includes a checklist of vital aspects that must be considered prior to the establishment making a commitment with an external provider. In particular, establishments should consider the educational aims of the visit, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met. Overseas expedition providers are required to comply with the minimum standards specified in the OEAP document.

42.EXCHANGE VISITS

The success of a foreign exchange is largely dependent on good relationships, planning and communication with staff in the host school. Visit leaders should read the OEAP guidance for exchange visits and satisfy themselves that they can meet their legal obligations, before formally requesting approval to develop this type of visit from the headteacher. Due to the nature of these activities, formal approval will be needed from the Trust to proceed. In the first instance the Headteacher and visit leader should contact the Trust Health and Safety Manager (in writing) 12 months before the activity date to demonstrate how the school would meet OEAP guidelines. Due to the nature of this activity Trust board approval will also be needed.

43.WATER MARGIN ACTIVITIES

Further information can be found in the OEAP publication 'Group Safety at Water Margins'.

Water margin activities are defined as learning activities that take place near or in water – such as a walk along a riverbank or seashore, collecting from ponds and streams, or paddling/walking in gentle, shallow water. It does not apply to swimming and other activities that require water safety qualifications and equipment, or water-going craft. Note that 'shallow' for the purpose of this guidance generally means up to the upper calf.

As with all activities the visit leader's judgment will be paramount. The activity should be matched to the participants in terms of aims, terrain, distance, equipment available, clothing worn, weather conditions (both current and forecast), degree of supervision and time available.

Water margin activities are not classed as adventurous and so do not require specific approval from the Trust. They must be approved by the EVC and headteacher on EVOLVE.

If the planned activity exceeds the above definition, the visit is 'water based' and will require approval from the Trust. See section 39.

The Royal Life Saving Society (RLSS) has developed a 'Water Safety Management Programme' to help leaders gain confidence in managing risk and reacting to emergencies on the water margin. Where possible the Trust would strongly encourage headteachers to ensure that visit leaders who complete water margin activities complete this training. If an incident occurs and visit leaders have not completed water safety training, then, the headteacher will need to explain why they decided this was not required.

44. WATER BASED ACTIVITIES

'Water based' activities are regarded as adventurous and therefore require approval from The Trust.

The responsibility for safety will therefore rest with either:

- An external provider - in which case the EPF should be completed (if they do not hold the LOTC Quality Badge)
- A member of school staff - in which case the ALF must be completed. Stating the persons qualifications and experience to lead the activity.

In order to participate in 'water based' activities, participants should be water confident. Parents should be asked to confirm this in writing. Participants who lack water confidence may still be able to take part in some elements of the activity if a risk assessment is developed by a competent person to develop the session to support the individual. Considering factors such as the activity taking place, staff competence and supervision arrangements. Reference to national guidelines may help in this process. The level of water confidence of all participants must be known by the activity leader prior to the commencement of the activities.

Leaders must have a knowledge of the water conditions/hazards (and potential changes) that might be encountered and prepare accordingly. Local advice must be sought where appropriate in unfamiliar locations.

Personal buoyancy conforming to the appropriate national governing body standard must be worn at all times by all participants in water-based activities.

45. BEACH SAFETY

The beaches and coastal areas in Lancashire and elsewhere offer a wide range of opportunities for both study based and activity-based use. However, whilst presenting many challenges and interest, areas where the land meets the sea present their own inherent hazards. A high level of

vigilance and supervision is needed when close to any stretch of water, even shallow water. The sea needs extra care and attention. Visit leaders planning activities in coastal areas should consider the following points:

- The ages, maturity and needs of the group. Their ability to follow instruction.
- Tides, swells, wind, currents, sandbanks, and cliffs can present difficulties. Exit routes must be checked well in advance and at all times during the visit or activity.
- The visit leader should be aware of the prevailing local conditions: surf and tide, currents, wind, cold water, weeds, polluted water and stability of the sea or riverbed may all affect safety. Gain access to local information where possible.
- Paddling in very shallow water needs to be strictly supervised, especially on coasts with sudden drops, submerged rocks, sandbanks, or large waves. Again, the visit leader must be able to remain in full control of all young persons, including those in and out of the water.
- Risk assessments for outdoor water-based activities should take account of the possibility of children who suddenly panic in cold water.
- Beaches present their own problems, particularly when large numbers of the general public are present. Establish a 'base' to which members of the group must return if separated from the rest. Look out for warning notices and flags.
- Be aware of the possible presence of dangerous debris such as glass, syringes, sewage, jelly fish, barbed wire, or marker flares.
- Digging in the sand, particularly in cliffs or dunes could cause cave-ins.
- Climbing on rocky beaches and cliffs should be discouraged. Do not work or base groups under such sites or allow young people to knock down or throw stones.
- Weed covered rocks may make surfaces very slippery.
- Children, young people, and staff on beach related visits should be made of the risk of sunburn and heat stroke. This should be considered as part of the risk assessment.
- Swimming is inadvisable no matter how inviting the sea may seem and should never be allowed as an impromptu activity. Visit leaders who decide to allow swimming should ensure this is part of a carefully supervised activity conducted by suitably qualified leaders, with adequate lifeguard provision and experienced adults in the group who are qualified to enter the water to rescue a swimmer in difficulty. The visit leader must be fully confident of undertaking a rescue of any member of the group and remain in control of the whole group, including those in and out of the water. See section 41.
- On cliff tops remain on the path. The visit leader should be at the front and a responsible adult at the back. Accompanying adults should act as a 'buffer zone' between young persons and the edge of the cliff. Cliff tops are exposed areas and may experience rapid changes in weather conditions. Clothing, route choice and group management should reflect this on very exposed paths. Be prepared to seek advice from the Coastguard, Lifeguards, the Met Office, or The Trust.

Visit leaders must only undertake those activities and projects which they have the necessary experience and competence to undertake.

46. SWIMMING

Where agreed and risk assessed, children and young people must be supervised by a competent adult at all times whilst undertaking swimming activities. Consideration must also be always to

given to changing facilities and safeguarding before swimming opportunities are considered. The following criteria **will always** apply:

47.OPEN WATER SWIMMING

Trust approval **is** required for this activity.

Public open water venues (beaches, lakes and so on) with an active lifeguard service:

- **The visit leader will bear the full responsibility for ensuring swimming safety.**
- Swimming may only take place in designated, marked areas, and with the lifeguard on duty.
- The visit leader must ensure that swimmers and non-swimmers are aware of any written or verbal safety advice provided by the on-duty lifeguard or local information boards and so on
- Whilst it is not essential, The Trust strongly recommends that the activity leader hold the RLSS UK National Rescue Award for Swimming Teachers and Coaches or has undertaken the 'Beach' module of the RLSS Water Safety Management Programme
- The presence of a lifeguard does not reduce the duty of the visit leader to manage the swimming activity safely, including regular headcounts and attention to the location/behaviour of the group at all times.

OEAP guidance must be followed at all times and used to develop risk assessments
[7.1o-Natural-water-bathing \(3\).pdf](#)

In the UK For free swimming activity:

- Staff or authorised person working on behalf of the school only must hold and provide original copies of a valid National Beach Lifeguard Qualification administered by the [Royal Lifesaving Society UK \(RLSS\)](#) (or equivalent in the country visited).

In the UK for structured or programmed activity:

- A valid RLSS UK Emergency Response (Activity Supervisor) Award **or**
- A written statement of competence by an appropriate technical adviser

The designated lifeguard must be dedicated exclusively to the group, and the location used must fall within the RLSS definition of a 'safer bathing area.' See the [RLSS website](#) for further detail.

48.SWIMMING POOLS (LIFEGUARDED)

Trust approval is **not** required for this activity.

UK swimming pool safety is guided by various Health & Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure teaching and coaching activities are conducted safely.

For publicly lifeguarded pools abroad, the visit leaders must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.

Unless suitably qualified, School staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.

Staff leading structured swimming lessons in the UK should hold an ASA level 2 Swimming Teacher qualification or higher. The current Trust teacher to young person ratio (as recommended by the ASA) for swimming lessons is 1:20.

Hotel (and other) swimming pools without a lifeguard

Trust approval is required for this activity. If lifeguarding arrangements are not provided at the venue, approval might not be given by the Trust. Parents must be asked if they agree to their child using an unsupervised pool parents must also provide assurance that their child can swim at least 25 metres.

If lifeguarding arrangements are not provided at the venue, then the visit leader will bear the full responsibility for ensuring swimming safety and take on a lifeguard role. The visit leader must note in writing on EVOLVE that they have approval from the EVC/headteacher to take on this role and develop a risk assessment to show how they would manage any significant risks. The Trust insurance provider (the RPA) must be made aware of the visit leaders' intention to lifeguard.

The role of the lifeguard is to:

- Keep a close watch over the pool and the pool users, exercising appropriate levels of control (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)
- If necessary, brief pool users in advance regarding 'rules' (for example, no diving, running and so on)
- Communicate effectively with pool users.
- Anticipate problems and prevent accidents.
- Intervene to prevent behaviour which is unsafe.
- Carry out a rescue from the water.
- Give immediate first aid to any casualty.

Before the swimming activity that the visit leader acting as lifeguard will:

- considering the normal operating procedures for the pool and the emergency plan.
- complete a full familiarisation of the systems described and walk through emergency plans.
- check safety equipment.
- look for hazards.
- brief supporting staff and participants
- staff should be aware of the procedures in the event of an emergency, and who at the venue will provide back up for the lifeguard during an emergency.

Staff will also need to ascertain whether they have exclusive use of the pool or whether other persons (for example, guests) are able to swim at the same time. Other pool users may increase the supervision role.

OEAP guidance for swimming pools must be followed [7.1x-Swimming-Pools \(2\).pdf](#)

49. FARM VISITS

Visits to private working farms, agricultural college farms, 'model' farms and rural studies centres are a regular feature of education for children and young people from both rural and urban environments. Such visits are usually highly beneficial to children in helping them to appreciate aspects of rural life. Children and young people are often invited to touch livestock, help bottle feed calves and lambs and consider animal husbandry. On occasion participants may be invited to taste milk or cheese

The Risks

Experience shows that visits can carry a small risk for the children and young people of acquiring infection, particularly gastroenteritis. Several micro-organisms are commonly present in livestock animals and may cause gastroenteritis in humans. They may be found in faecal droppings and elsewhere in the farm environment. Farm visits may result in a risk of transmitting infection directly because the substance eaten is infected or contaminated. In addition, fingers may become contaminated with animal faeces which is then transferred to their mouths when eating or simply sucking their fingers or thumbs.

Health Precautions

Visit leaders need to be aware that visitors may be more susceptible to infection from the farm environment and its products than those who live in that environment. Therefore, prevention depends primarily on simple hygiene measures. Parents, teachers and children should be made aware of these measures, and they should be re-emphasised before and during the visit. Visit leaders should consider advice provided by

Farms for schools [Farms for Schools Website](#)

OEAP [7.1g-Farm-Visits \(3\).pdf](#)

For Visit leaders and supervising staff

- Conduct a pre-visit to identify specific hazards.
- Ask children and young people with cuts or abrasions to cover them with a suitable dressing.
- There should be a briefing for children and young people at the farm at which the points in these guidelines should be covered.
- Remind participants to keep fingers out of their mouths and do not eat their sandwiches and so on until they have washed their hands.
- Do not sample, raw milk or cheese. Remind the farmer this is prohibited.
- Do not drink from farm taps.
- Children and young people should be closely supervised if direct contact with animals is likely. If this happens, they should be made to wash their hands afterwards.
- Never let children or young people place their faces against the animals.
- Do not let children or young people play in the farm area (grain storage tanks, slurry pits) other than designated play/rest areas.
- Keep handwipes or sanitiser ready for use.
- Eat food away from the main farm. Check the area is hygienic.
- Request and check the farm visit risk assessment.

Other Hazards

Modern farms can present hazards to children, young people and adults. Visit leaders need to be aware of:

- At harvest time some children and young people with asthma or hay fever may experience
- difficulty
- The dangers of moving machinery and mechanised tools such as chain saw and so on
- Some farms hold stocks of highly toxic chemicals, used in spraying etc contact with which presents a clear hazard.
- The possible risk of diseases being transmitted to pregnant women during lambing time. Speak to accompanying staff as needed.

Although the above guidelines have been written with farms in mind, the general principles should be followed when visiting other similar establishments (zoos, wildlife reserves, and so on).

50. ACTIVITIES ON THE SCHOOL SITE

An increasing number of schools now utilise their own sites for a range of activities. The Trust strongly encourages this approach due to its low cost and frequent accessibility.

Activities range from gardening/growing activities, forest school activities, Team Building, pop up pools, mobile climbing walls, geo-caching, camping/sleepovers and so on.

The Trust does not operate an approval system for most on site activities. However, the following advice should be followed when developing 'in house' activities or by employing external providers:

- Do conduct and record a risk assessment for new activities. This should not be an onerous task and should always form a key element when developing new activities. The risk assessment should be reviewed on every occasion that the activity is repeated, and a note made of any amendments (for example, additional hazards presented by the special needs of a particular young person).
- Do consider your choice of materials, how they are used for 'team building' and 'problem solving' type activities, and how closely the group should be controlled while using the equipment.
- Do consider staff training for grounds-based activities, especially for those which may offer more significant risks such as fire-lighting, outdoor cooking, using hand tools for conservation work and so on.
- Ensure that any contractor has adequate third-party liability insurance, and you are absolutely clear about your contractual obligations, including any costs you may have to bear in the event of cancellation.
- When gardening and growing, remember the need for simple hygiene, and take advice on suitable plants/animals for a school/setting environment.
- When considering larger scale developments (for example, school climbing walls, high ropes structures and so on) seek further advice with reference to their safe installation, maintenance, and staffing/supervision needs.

On-site activities that would require Trust approval (via EVOLVE) are those that would fall into the category residential (camping and so on) The normal approval process should be followed for this kind of activity.

51. SCHOOL CLIMBING WALLS – RECORD KEEPING

Where a school or setting has an on-site climbing wall where either top roping or lead climbing is undertaken then it is essential that clear records are kept of:

- Operating procedures
- A risk assessment for use and maintenance
- Safety equipment purchase dates and inspection dates.
- Staff qualification and training and training updates
- Belay point inspection dates

52. TECHNICAL EXPERTS

We may rarely but importantly require the services of an agreed 'technical expert.' Experts have been identified for canoeing/kayaking and improvised rafting, rock climbing/mountaineering and off-road cycling. They help the school and Trust identify if staff have the skills to lead certain technical activities. In the main the Health and Safety Manager will lead on making contact with those persons

53. MONITORING

This policy will be reviewed every 3 years, should a significant incident occur or following a change in legislation that impacts upon the content.

OFF SITE VISIT CHECKLIST (APP 1)

POINT TO CONSIDER	ACTION COMPLETE OR ACTION NEEDED
INITIAL APPROVAL	
Has the Headteacher given approval for the trip/visit or activity to take place?	
Is the activity adventurous, overseas or residential? (If so, Trust approval is needed). The date of the activity must be submitted to the Trust at least 4 weeks before the intended activity date.	
Has schools "parent" consent process been followed (for routine/low risk trips and activities) and for higher risk, residential, overseas	
Has full consent been obtained for EYFS children on any trip/visit or activities?	
VISIT LEADER (COMPETENCE AND TRIP DEVELOPMENT)	
Is there a clearly identified Visit Leader who is experienced and competent to assess the risks and manage this trip or activity?	
If required, is there a deputy visit leader?	
If the visit leader will lead an adventurous activity have, they completed a Activity Leader Form on EVOLVE? are qualifications checked? Does the headteacher agree they are competent?	
If the trip is higher risk adventurous and staff lead, do you need external technical advice to confirm competence?	
Has the visit leader ensured all significant risks from leaving school to the return have been assessed? • Coach, flights, ferry, • Accommodation / venues to be used • Activities	

• Downtime • Supervision / missing students • Medical issues, special needs • First aid • Behaviours • Emergencies • Etc	
Does the visit leader have (as needed) • Consent forms (as needed) • Swimming ability information (as needed) • EHCP / student risk assessments • Medical information • Emergency contacts numbers • Passport information / medical cards • Plan B and risk assessment information. • Itinerary • Help cards	
OUTCOME AND ACTIVITIES	
Is there a clearly defined purpose for the whole trip/visit? Are the activities appropriate to the age and ability of the participants?	
VENUES	
Does the visit involve adventurous activities booked through commercial, charitable, or other external providers? If yes has the visit leader confirmed the provider has an LOTC or AALA (where needed)?	
Where there is no LOTC (for a provider offering a school a service) has the visit leader requested and uploaded a provider form (EPF)? This provides assurance to you that the organisation manages H&S to a suitable standard. This is your due diligence.	

Has the visit leader made a preliminary visit to the venue/centre to check arrangements? If this is not possible, has the visit leader gathered assurances and references?	
Is the proposed location of the visit suitable for the activity to be undertaken and manageable for the group?	
ACCOMPANYING PERSONS AND RATIOS	
Have members of staff or adult volunteers been DBS checked? If not, how will this be managed by the visit leader? Do accompanying staff know their roles and the content of risk assessments?	
Where needed, are there both male and female supervision or a plan to manage this?	
Do accompanying staff know their roles and the content of risk assessments?	
Does the group have an acceptable staff/pupil ratio for the proposed activity? Has the EVC and Head Teacher agreed with this?	
Do management plans and staffing ratio's reflect the support of those pupils with specific needs?	
Are the young people prepared for and physically capable to take part in the activity?	
TRIP ITINERARY AND KIT LISTS	
Is there an approximate itinerary for the visit? Does that include plan B's	
Do young people and parents have the kit lists for clothing and any equipment necessary for the proposed activity? Allowing for a range of weather conditions?	
Will the provider or visit leader take any offer any additional suitable clothing or equipment to undertake the activity? Consider plan B's in case any participant does not have enough kit.	
ADDITIONAL NEEDS / DIETARY AND MEDICAL	
Are relevant staff aware of special dietary and medical needs for the young people and/or staff within the group?	

Have suitable and sufficient first aid arrangements been made for the trip?	
Where needed have individual RA been developed and shared?	
Have plans for medication, emergencies and staff support been considered?	
HIRED COACHES WITH DRIVER, FERRY, TRAIN, PLANE ETC.	
Has someone confirmed the provider is a suitable operator with a valid “operator licence” in place? Has the visit leader requested the risk assessment?	
Has the visit leader considered on coach supervision arrangements and behaviours?	
Has the visit leader considered airport or port management? supervision arrangements and behaviours?	
Will departure and return times be made known to staff, young people and parents? Is there a contingency plan (Plan B) in the event of a delay, incident or early return?	
SCHOOL OWNED MINIBUS (STAFF DRIVEN)	
Are there suitable and sufficient school approved drivers available for the duration of the planned journey? Is there a “back up driver” for the trip	
Are drivers licensed to drive the type of vehicle? Have license checks been undertaken using DVLA?	
Will departure and return times be made known to staff, young people, and parents? Is there a contingency plan (Plan B) in the event of a delay, incident, or early return?	
Do staff have a supervision plan?	
Are pre use checks completed?	
Has the vehicle been inspected, documentation checked to prove its road worthiness?	
Do staff know the content of the bus risk assessment?	
Is a trailer or baggage vehicle required? (If so, does the driver have the correct license?)	

BRIEFINGS

Where needed have the following briefings taken place (examples below)? Do you have notes, a PowerPoint or booklets for Student e.g.

- Code of conduct, personal behaviour, music equipment and mobile phones.
- Appropriate clothing and equipment.
- Rendezvous procedure.
- Any relevant risk information, first aid, or procedures etc.
- Groupings for study or supervisory purposes.
- Recall and emergency procedures.

Parents e.g.

- How risks will be managed.
- Communication and sharing information.
- Poor behaviour management.
- Exclusions.
- Availability.

Staff / volunteers e.g.

- Purpose of the visit.
- Defined roles and responsibilities of the named staff.
- Standards of behaviour from the young people.
- List of names pupils allocated to each group.
- Careful supervision, to cover the whole period of the visit. Including downtime
- Regular checking of participants.
- How much help to be given to the young people in their tasks.
- Communication procedures.
- Anticipation of hazards and the nature of the activities.
- Option to STOP an activity if they feel it is unsafe/not within the ability of the pupil.

• Information from risk assessments • First aid process. • Emergency procedures in the event of an incident. • Accident reporting.	
EMERGENCY CONTACTS	
Have the named 24-hour emergency point of contact been identified and added to EVOLVE? Are they aware of their responsibilities?	
CONTINGENCY PLAN	
Is there a contingency Plan B in place? Consider the following: • Bad weather preventing activity going ahead. • Changes in terror threats, Government guidance. • Change in accommodation. • Change in transport arrangements. • Change in timetable. • Illness amongst the party requiring a visit to hospital/return home. • Poor or bad behaviour of students resulting in action. • A very crowded area. • An event in the area or country leading to a serious risk. • Staff identifying an issue that might make the activity unsafe.	
Form completed by :	Date:
Further remedial actions required:-	
Approved: Yes / No	Signed:



National
Guidance

oeapng.info

PROVIDER STATEMENT – APP 2

Notes for the Visit Leader

- You should complete Part 1 and then send the form to the provider for completion.
- You should not send this form to a provider that holds a valid Learning Outside the Classroom Quality Badge, unless you require confirmation of the questions in Section A. Details of the badge and its holders can be found at lotcqualitybadge.org.uk.
- If you need advice on the interpretation of information given by the provider on this form, you should contact your establishment's Educational Visits Coordinator (EVC).

Notes for the Provider

- Thank you for completing this form. It is designed to help the Visit Leader confirm that you meet required standards.
- Please complete Part 2 and return it to the Visit Leader at the establishment named below.
- You can find out about the guidance that establishments and Visit Leaders should follow at oeapng.info – see especially document 4.4h "Using External Providers and Facilities".

PART 1: To be completed by the Visit Leader

Name & address of establishment (school/service)	
Email	
Name of	
Name of provider	
Proposed date(s) of visit	

PART 2: To be completed by the provider

Please consider the following questions and respond with YES, NO or N/A, or give the specific information required. If you wish to provide additional information, please add * to your response, and give the information in the space provided at the foot of the form.

If you hold a valid Learning Outside the Classroom (LOtC) Quality Badge, you need complete only Section A and the Confirmation.

SECTION A		
To be completed for all types of visit		
1. Learning Outside the Classroom Quality Badge		
1.1	Do you hold a valid Learning Outside the Classroom Quality Badge?	
2. Data Protection		
2.1	Do you comply with the Data Protection Act 2018 and GDPR?	
2.2	Do you have a privacy policy that explains how any personal data the establishment shares with you will be shared, used, stored, secured and eventually deleted or returned?	
2.3	Do you undertake to ensure that no images of participants are taken or used for marketing purposes, or published in any way, without the specific written consent of the establishment and of the participants (or their parents if the participants are under 18)?	
3. Waivers / Disclaimers		
3.1	Do you guarantee that the establishment, the participants or their parents will not be required to agree any waiver or disclaimer which seeks to limit your liability for death or personal injury resulting from your negligence?	

SECTION B		
To be completed for all types of visit		
4. Insurance		
4.1	Do you hold public liability insurance which will be current during the proposed visit and which covers all directly provided and sub-contracted activity?	
4.2	If Yes, what is its indemnity limit?	£ M
5. Health, Safety and Emergency Policies		
5.1	Do you comply with relevant health and safety regulations, including the Health and Safety at Work etc. Act 1974 and associated Regulations, and have a written health and safety policy and recorded risk assessments which are available for inspection?	
5.2	Do you have procedures for accidents & emergencies, and for reporting incidents and accidents?	
6. Vehicles		
6.1	Are all vehicles to be used roadworthy, and do they meet the requirements of regulations in the country in which they will be used and regulations on passenger seats and seat restraints?	
7. Staffing		
7.1	Do you have a robust recruitment and engagement process to ensure that staff are suitable to work with young people, including enhanced DBS check and barred list check for any staff engaged in regulated activity?	

7.2	Are there regular opportunities for liaison between your staff and establishment staff?	
7.3	Is there sufficient flexibility to make radical changes to the programme if necessary, and will the reasons for any such changes be made known to establishment staff?	

8. Accommodation		
8.1	Does UK accommodation comply with current fire regulation requirements (Regulatory Reform, (Fire Safety) Order 2005)?	
8.2	Have you inspected all overseas accommodation to be used to confirm that it meets legal requirements of the country concerned and that it has fire safety and security arrangements equivalent to those required in the UK, and are records of these inspections available?	
8.3	Are there security arrangements in place to prevent unauthorised persons entering the accommodation?	
8.4	Are separate male and female sleeping accommodation and washing facilities provided?	
8.5	Is staff accommodation sufficiently close to young people's accommodation for adequate supervision?	
9. Sub-contracting		
9.1	Will you sub-contract any services (e.g. activity instruction, transport, accommodation)?	
9.2	Where any element of provision is subcontracted, do you ensure that each sub-contractor meets the relevant specifications outlined in the other sections of this form, and are records of checks of sub-contractors available for inspection?	

SECTION C		
To be completed if the visit includes activities or field studies		
10. Adventure Activities Licensing Authority (AALA) Licence to be completed if any activities are within the scope of the licensing regulations		
10.1	AALA Reference number Date of expiry	
10.2	Does the Licence held cover all planned activities, which are in the scope of AALA licensing?	
11. Activity Management to be completed about all activities		
11.1	Do you have a policy for staff recruitment, training and assessment, which ensures that all staff with a responsibility for participants are competent to undertake their duties?	
11.2	Do you maintain a written code of practice for activities, which is consistent with any relevant National Governing Body (NGB) (or equivalent organisation) guidelines and, if overseas, the relevant regulations of the country concerned?	
11.3	Do you confirm staff competence by appropriate AALA-recognised qualifications for any adventure activities to be undertaken, or have staff had their competence confirmed by an appropriately qualified and experienced technical adviser?	

11.4	Where there is no NGB or equivalent organisation for an activity, are operating procedures, staff training & assessment requirements explained in a code of practice?	
11.5	Will participants at all times have access to a person with a current first aid qualification, and are staff practised & competent in accident & emergency procedures?	
11.6	Do you make clear your expectations of how responsibilities for the supervision and welfare of participants are shared between your staff and visiting staff?	
11.7	Is all equipment used in activities suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks as necessary?	

SECTION D

To be completed by Tour Operators

12. Tour Operators

12.1	Do you comply with the Package Holidays and Package Tours Regulations 1992, the Foreign Package Holidays (Tour Operators and Travel Agents) Order 2001 and the Package Travel and Linked Travel Arrangements Regulations 2018 including bonding to safeguard customers' monies?	
12.2	Details of bonding (ATOL, ABTA, etc.)	

SECTION E

To be completed if the visit includes an overseas expedition as defined at oeapng.info/downloads/download-info/7q-overseas-expeditions

13. Overseas Expeditions

13.1	Do you comply with British Standard BS8848:2014?	
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SECTION F – ACCREDITATION

14. Details of any accreditations held by the Provider

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PROVIDER CONFIRMATION

I confirm that the details given above are correct, and that our organisation will give prior notification of any significant changes that might affect the safety and wellbeing of user groups.

Signed			Date	
Name			Position	
Name of Provider				
Address of Provider				
Telephone		Website		
Email				
Additional information				

EMERGENCY PROCEDURE (VISIT LEADER AND DEPUTY) APP 3

This 'card' must remain with the visit leader at all times

Name of visit leader / deputy	
Details of trip or visit	
Location of relevant safety information/contacts	

A. LOW RISK INCIDENT:

In the event of an incident or accident that **does not** involve significant injury or fatality and **is not** likely to require media liaison.

The visit leader should seek advice from the relevant school emergency contact(s), **section C below**. The Emergency contact should speak to the Trust as needed and ensure an accident form is completed and submitted to the headteacher within 5 days.

B. HIGH RISK INCIDENT:

In the event of an incident that **does** involve significant injury or fatality, and/or **is** likely to require media liaison.

The visit leader must lead on the following:

Assess the situation, ensure the area is as safe as possible and ensure uninjured members of the group are secure and safeguarded:

- Ensure the first aider or nominated person supports the casualties (if applicable).
- Call emergency services. 999 **for add the appropriate number if abroad**

Then contact the School Emergency Contact person who will request/require the following information:

Item	Details	Response
1.	Suitable contact numbers for calls	
2.	Nature, date, time and location of incident	
3.	Names of casualties and the nature of their injuries	
4.	Names of others involved	
5.	The action that has been taken so far	
6.	The action yet to be taken and by whom	
7.	The immediate and longer-term support you might need	
8.	Agree with the School Emergency Contact who will notify the Trust. This should normally be the School Emergency Contact in the first instance	

9.	Seek advice from the Trust on who will notify parents/carers of the casualties and how.	
10.	The Trust contact will liaise with the Health and Safety Manager, Director of Education, RPA Insurance and manage any media enquiries	
11.	If practicable, the visit leader would delegate group supervision and leadership to the deputy visit leader so they can be contactable at all times, and can coordinate actions	
12.	The visit leader should if needed, contact the British Consulate/Embassy if abroad insert number before going on the visit	
13.	As far as possible, prevent group members from using telephones or mobiles, or going on-line, until agreed by the Trust/Head teacher	
14.	Seek further and full details of the incident, how and why it happened (so far as can be established at this stage). Note down all relevant facts and witness details and preserve any vital evidence. Maintain a timescale/log of all actions taken and conversations held. You will need to develop accident/incident forms after the event.	
15.	Refer all press or media enquiries to the Trust Critical Incident Manager	
16.	Keep receipts of any expenses incurred.	
17.	The School Emergency Contact will continue to support and advice, they will help you develop plans, arrange bookings, provide financial help if needed etc.	

C. EMERGENCY CONTACTS:

Item	Name	Office Hours	Out of Hours
1.	Base contact		
2.	Head teacher		
3.	Deputy Head teacher		
4.	Trust contact number	01282 855500	

INSURANCE

For emergencies and urgent incidents (excluding overseas travel)

Email RPA.CM@davies-group.com Call **03300 585566**

For overseas travel emergencies and urgent incidents Call **020 3475 503**

EMERGENCY CONTACT PROCEDURE (BASE CONTACT(S))	
This 'card' must remain with the school emergency contact(s) at all times	
Name of Visit Leader / Deputy	
The School Emergency Contact(s) should have relevant visit information this is located.	[insert location of the relevant information]
Itinerary, venue details, names and emergency contact details for all participants including staff, etc.	

In the event of being contacted by the visit leader (or other member of staff involved in a visit), the 24-hour contact should:

A. LOW RISK INCIDENT:

In the event of an incident or accident that does not involve serious injury or fatality and is not likely to require media liaison.

- If possible, provide the assistance required by the visit leader or arrange to get support or advice from suitable persons e.g., break down service, head teacher.
- Seek further advice and pass on details to other school contacts that may be able to assist.
- Ensure the Head teacher and if needed the Trust are made aware of the situation.
- If needed, complete an accident/incident form include as much information as possible.

B. HIGH RISK INCIDENT

In the event of an incident that does involve significant injury or fatality, and/or is likely to require media liaison.

Then you must speak to the visit leader or deputy and request the following information.

Item	Questions	Response
1.	Have the emergency services been informed? Have they arrived?	
2.	Is the rest of the group safe? adequately supervised? and cared for?	
3.	Has the deputy leader taken over group leadership?	
4.	What contact numbers should be used for calls?	
5.	What is the nature, date, time and location of incident?	
6.	Are there any casualties does the leader know the nature of their injuries?	
7.	What are the details of others involved?	
8.	What action that has been taken so far?	
9.	What action needs to be taken and by whom?	

10.	Has the British Consulate/Embassy has been contacted (if needed) and any advice given?	
11.	What other support is needed?	
12.	Contact the Head teacher (if this is not you) and provide a briefing of the situation.	
13.	Contact the Trust who will provide guidance and steps regarding media, parent contact, and insurance.	
14.	The Trust contact will contact the Health and Safety Manager, relevant Director of Education and alert the Insurance provider.	
15.	The base contact might arrange for a holding message for parents (with support from the Trust)	
16.	Keep in touch with the visit leader offer any support as needed	

C. EMERGENCY CONTACTS:

Item	Name	Office Hours	Out of Hours
1.	Base contact		
2.	Head teacher		
3.	Deputy Head teacher		
4.	Trust contact number	01282 855500	

INSURANCE

For emergencies and urgent incidents (excluding overseas travel)

Email RPA.CM@davies-group.com

Call **03300 58556**

For overseas travel emergencies and urgent incidents

Call **020 3475 5031**

APPENDIX 04 – EXAMPLE CONSENT TEMPLATE FOR SCHOOL TRIPS AND OTHER OFF-SITE ACTIVITIES

The template below has been developed and adapted from the DFE consent template for school trips and other off-site activities. It is not suitable for EYFS children.

Further information can be found by following the link.

[Consent for school trips and other off-site activities - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/school-trips-and-visits-policy)

Schools should also read the Consent guidance in ***Trips and Visits Policy***

Where annual consent is used, schools must ensure emergency contact information is kept up to date at all times.

Add school details and logo as needed.

A. Please sign and date the form below if you are happy for your child, **[name of the child]**:

- 1) To take part in low risk school trips and other activities that take place off school premises during the normal school day and
- 2) To be given first aid or urgent medical treatment during any school trip or activity.

B. Please note the following important information before signing this form:

The trips and activities covered by this consent includes;

- All low risk activities and visits that take place during the school day for example **[insert detail this might include church visits, walks to local amenities, local field trip, local sports match during school hours]**
- Off-site sporting fixtures during the school day

The school will still send you information about each trip or activity before it takes place, including where you need to provide specific clothing or refreshments.

You can, if you wish, tell the school that you do not want your child to take part in any particular school trip or activity. You should do this by **[insert detail]**

Written parental consent will not be requested from you, for the majority of off-site activities offered by the school. For higher risk, adventurous, residential and overseas visits, after school activities, and swimming/water margin activities. We will request formal approval for your child to participate in the trip.
[We will not accept consent over the phone]

Please complete the medical information section below (if applicable) and sign and date this form if you agree to the above.

C. Medical information:

Details of any medical condition that my child **[name of child]** suffers from and any medication my child should take during off-site visits:

.....
.....

Signed:

Date:

LOCAL AREA VISIT SCHOOL TEMPLATE APPENDIX 5

WHAT ARE LOCAL AREA VISITS?

The Department for Education (DfE) classify trips into 2 main types: **Routine Visits** and **Trips that need a risk assessment and extra planning**. They add that routine visits should include “...no more than an everyday level of risk... covered by school’s current policies and procedures... They can be considered as lessons in a different classroom.”

So, the Trust is content to endorse the statement that Local Area Visits can be defined as low-risk visits to venues in your local learning area which you are confident are covered by your school’s current policies and procedures. There is a facility to log local area visit son Evolve+.

If schools intend to use the “local area visit” within EVOLVE+ (to manage and approve very low risk and frequent visits in the local area), they should add relevant information below and share this with staff on site. You can then save the document on EVOLVE+.

Local area visits must never be used to cover EYFS trips or higher risk activities for primary or secondary students or remote supervision activities. Where there is any doubt, the school must input the full visit onto EVOLVE.

Identifying trips suitable for local area visits

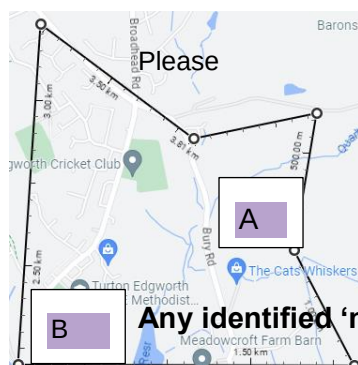
- Headteachers should consider which routine trips and visits should be classed as a local area visit. Considering their local area and any risks present. Visits might include - walks to the local park, churches, libraries, shops, local schools, walks in the village.
- Local area visits **must always be** curriculum based with identified outcomes.
- The headteacher should consider/advise the EVC if additional risk assessments might be needed for any local area visits.
- Risk assessments must match the level of risk.

SCHOOL PROCESS LOCAL AREA VISITS

Our Local Learning Area and Agreed Local Area Visits

In this school [insert name] the Local Learning Area includes, but is not limited to, the following frequently used venues: [the below are examples. These must be amended as needed] e.g.

- Local [insert name] Church [insert walking distance from school]
- [insert name] Library [insert walking distance from school]
- [insert name] Pool and Leisure Centre [insert walking distance from school]
- [insert name] local village shop [insert walking distance from school]



Some schools might prefer to use a map with locations for example.

remove, or replace the map with one which is representative of your local area

A=visit to local village post office .5 mile from school

B=visit to local church .3miles from school

Any identified ‘no-go’ areas within the local area.

These must be identified by the EVC and headteacher.

[if there are any areas that must be excluded from local area visits, these must be listed here.

For example.

- xxx Street on market days. It is too busy for safe supervision, with a lot of traffic.
- xxx area in the park following advice from the schools community officer.
- The road crossing at xxxx the vision is not clear enough for safe crossings (STAFF MUST use footbridge opposite library)

Generic Risk Assessment

We have a simple and basic generic risk assessment for the activities covered by our “local area visits” this is located [\[insert location\]](#)

The following are the hazards our staff must consider within our local learning area:

Staff / parents unaware of the location of staff and students	• The Head, Deputy or EVC (<i>delete as necessary according to your circumstances</i>) must give approval before the EVOLVE visit is entered and takes place. • The school uses [insert consent details] • The visit leader will be recorded on local area visits section of Evolve+
Communication and emergency	• A mobile is taken with each group and the office have a note of the num • Travel first aid kit taken by the visit leader • In an emergency support will be gathered by contacting [insert name(s)]
Road traffic	• Additional areas of risk identified in no go areas • Visits completed at quieter times where possible avoiding [insert detail] • Staff reminded to use crossings at all times • Pupils have been trained and have practiced standard techniques for road crossings in a group. <i>For primary schools this is easy to do with some simple road markings in the playground – with a little practice this can become drilled and slick, as everyone knows what is going to happen.</i> • Young people provided with a briefing before trip by visit leader. This includes how certain risks will be managed • Students to wear hi vis vest
Other people / members of the public / animals.	• Young people are provided with a briefing before trip by visit leader. This includes how these risks will be managed. • Supervision plans include information on managing these risks.
Staff supervision	• Only staff judged competent to supervise groups in this environment are approved. A current list of approved staff is maintained by the [insert detail]. • The school ratio for local area visits is [insert detail]. Normally at least 2 staff. • Headcounts completed at regular intervals by the visit leader. There is a plan to ensure no one becomes separated from the group. • Staff must be familiar with the area, the participants, their needs and emergency procedures.
Needs of students	• Any children with additional requirements identified and supported by [insert detail] • Staff are aware of any relevant pupil medical information and ensure that any required medication is available.

Uneven surfaces and slips, trips, and fall	• Pre check of young persons footwear • Reminder of sensible behavior during trip • Local area visits on public footpaths, no additional risk from slips trips and falls identified for the trips we complete <i>[add any risks, slopes, banks, very muddy areas]</i>
Weather conditions	• The visit leader checks the weather before the trip commences to ensure this does not pose an additional risk and that students have suitable clothing. A plan B trip will be considered by the visit leader if a significant risk is identified
Activity specific issues when doing fieldwork (nettles, brambles, rubbish, etc).	• Young people are provided with a briefing before trip by visit leader. This includes how these risks will be managed. • If high risk issues are identified e.g. sharps a plan B trip will take place in another location
<i>etc.-add anything else specifically relating to your Local Learning Area</i>	

Important

PLUS, you must add any additional specifics relating to your local area, e.g.:

- *When crossing Bimble Street, only the crossing by Baguette the Bakers must be used.*
- *When in xx park complete musters and head counts at XX and xx.*
- *Pupils must be informed that they are not allowed to use the vending machines at Parkgate Leisure Centre.*
- *etc.*