



From the heart

ST JOHN'S COLLEGE
Cardiff

Educational Trips and Visits Policy

St John's College, Cardiff

EDUCATIONAL TRIPS AND VISITS POLICY

This policy applies to all sections of the School:

Sixth Form, Senior School, Junior School,
Infant School & Nursery.

Version: September 2023

Also included:

**OEAP 2010 Educational Visits - A safety guide for learning outside of the classroom - All
Wales guidance, 2010.**

Introduction

An educational trip or visit has enormous potential for enriching the school curriculum and, in some cases it is an essential requirement of examination courses. Such enterprises, though demanding, can be enjoyable experiences for both students and staff. Thousands of school trips and visits take place every year, the vast majority safely and without incident. However, we are all aware that very occasionally things can and do go wrong. It is, therefore, very important that all trips and visits are properly planned and organised and that all staff involved with school trips and visits take all reasonable steps to ensure that risks are minimised.

This policy has been written with regard to the All Wales Guidance 2010, Educational Visits - A safety guide for learning outside the classroom and the Health and Safety Executive 'School trips and outdoor learning activities', June 2011, and the Department for Education 'Advice on Legal Duties and Powers For Local Authorities, Head Teachers, Staff and Governing Bodies.' Essentially these documents summarise the existing health and safety law relevant to schools and how it affects governing bodies, head teachers and other staff. St John's College adheres to the recommendations set out by The Outdoor Education Advisers Panel National Guidance, (OEAPNG), and has appointed a Head of Outdoor Education, (from April 2018) <https://oeapng.info>. A qualified school EVC oversees all school visits and all new teachers receive induction to ensure school procedure and National guidance is followed.

Definition

For the purpose of this policy, a school trip or visit is defined as any occasion when a student or group of students are away from the school campus, undertaking a school activity and under the supervision of a member of staff. In order to avoid unnecessary repetition, the word 'trip' will largely be used throughout this policy but where this occurs, please understand 'trip and/or visit', as appropriate.

This policy pays attention to the following guidance:

- Children should be able to experience a wide range of activities. Health and Safety measures should help them to do this safely, not stop them;
- It is important that children learn to understand and manage the risks that are a normal part of life;
- Common sense should be used in assessing and managing the risks of any activity. Health and safety procedures should always be proportionate to the risks of an activity;
- Staff should be given the training they need so they can keep themselves and the children safe and manage risks effectively.

There is no longer any requirement by law for schools to have an EVC. However, the Senior Deputy Head has the role of Educational Visits Co-ordinator (EVC). He can give advice about all aspects of school trips and visits. He has copies of relevant documentation from the Health and Safety Executive and other agencies. Staff are asked to consult as fully as possible with the EVC before, during, and after a school trip or visit. Feedback from trips and visits is an important mechanism for ensuring against future incidents.

Permission for and notification of School trips

The EVC **must** be notified of all occasions when a student or group of students leave the school premises, either accompanied by members of staff or to meet members of staff at a pre-arranged location. This forms a key part of the duty of care we owe to students. It is not easy to give a definitive list of such trips, but examples include trips to museums, galleries and theatres, trips to educational conferences, trips for boarders, both in the evenings and at weekends, residential trips such as skiing holidays or CCF camps, Duke of Edinburgh's Award expeditions and all sports fixtures and sports tours. If staff are in doubt about the nature of a trip or visit then they should seek the advice of the EVC.

All staff must complete a School Trip Application Form before departing on a school trip and give the form to the EVC.

The EVC **must** also give permission before any trip can take place. Staff wishing to organise a trip **must** complete a School Trip Proposal Form and submit it **as far in advance as possible**. (Copies of the relevant Trip Proposal and Trip Information forms appear at the end of this document.) After the calendar has been checked for clashes, and after the Senior Deputy Head has been consulted where relevant, the EVC will give approval for 'routine' day trips. Any residential visits, or visits likely to have a significant impact on the day to day running of the school, need to be approved by the EVC in consultation with the Headmaster, and School Accountant using the separate Proposal Form for Residential Trips. Where possible, proposals for residential trips should be made to the Headmaster and Senior Deputy Head for approval, one full academic year in advance of the trip so that parents can be given fair warning of any significant additional costs.

Staff must not spend any money or inform students or parents that a trip or visit is going ahead until it has been formally approved and all four sections of the relevant form have been signed.

Planning Trips and Visits

The following list is not exhaustive, but it tries to summarise what needs to be done during the planning and organisation of a trip. The list also gives further ideas about areas for risk assessment:

- Ensuring all staff (volunteers/parents helpers where appropriate) understand their role and responsibilities and where appropriate, for example, expedition leaders in DofE or an official supervisory role within CCF, they have received appropriate training and have been officially recognised as competent to lead such activities
- Follow the School's approved process for checking the competency or suitability of a member of staff to lead or accompany a trip or expedition
- Student behaviour and expectation;
- Facilities/equipment the group will need to take;
- Facilities/equipment provided at the venue;
- Staff training needs E.G. First Aid qualification;
- Designating someone to record the visit and carry accident forms, etc.;
- Transport arrangements, including meeting arrangements for trips which leave before the start of morning school and collection arrangements for trips which return after the end of normal school;
- Appropriate Risk Assessments;
- Insurance arrangements;

- Communication arrangements;
- Supervision ratio;
- Contingency plans for enforced changes of plans or late return;
- Information to parents;
- Information to school;
- Preparing students, including specialist training for CCF or DofE activities and medical needs;
- Arrangements for sending students home early;
- First Aid provision;
- Medical information;
- Emergency procedures, including contact details and permission for emergency medical treatment if the parents cannot be contacted.

Members of staff are strongly encouraged to plan their pattern of trips and visits for the coming academic year as early as they can, preferably by May half-term. This allows clashes to be kept to a minimum. Trips and visits planned well in advance must be included in the termly school calendar. Events listed in the school calendar take priority over non-calendared events. The earlier a trip is planned, the more likely it is to be approved. If two events clash, then the Senior Deputy Head will resolve the matter.

Students must miss lessons as rarely as possible. While it is often easy to justify a trip from the benefit to one's own subject, lessons missed in other subjects need to be considered. Obviously, there will be times when it is impossible to avoid taking students out during lesson time, but full consideration must be made of alternative times before making such a decision.

Staff organising a trip must consult as widely as possible with colleagues who might be affected and think carefully about the possible impact of a trip. For example, as far as possible, trips should not be organised on busy games afternoons, and **residential trips should take place during school holidays to avoid a loss of teaching time.**

Informing Other People

It is essential that all people concerned with the trip are fully informed at appropriate times. Once the planning has been completed and the trip has been approved, the full details of the trip must be prepared. These details, together with copies of letters for parents, must be submitted to the EVC before being sent out.

Communicating with parents

Parents must be informed in writing about all trips. Written consent is not required for students to take part in the majority of off-site activities organised by a school (with the exception of nursery age children), however this School operates a policy where **Parental permission is required for all trips**. It is acceptable for this permission to be gained through an 'opt out' system rather than by asking parents to complete a consent form and send it back. For example, a phrase along the lines of *'It will be assumed that you are happy for your son/daughter to go on the trip unless we hear otherwise'* is acceptable. This method may be easier where whole Year groups are being taken out and/or when a trip takes place during normal school hours. However, where smaller numbers are involved, where a trip leaves very early or returns very late, and **for all residential visits**, specific signed permission

must be obtained from parents. Trip leaders must have an alternative option planned for any student whose parents decline permission to go on a trip.

If a trip involves overnight accommodation, parents must be given full details of the type of accommodation provided and the security arrangements which are in place to ensure the safety of their child. They must be fully informed as to the nature of the trip, with a clear indication if the students may be unaccompanied while away from school. Parents must acknowledge that their child is fit enough to go on the trip, outline any health problems and authorise the leader of the party to act on their behalf in an emergency. They must also provide a contact number for the duration of the trip.

For longer trips, particularly those overseas, it is essential to hold a Parents' Information Evening a few weeks before departure. This allows information to be shared, questions to be asked and answered, and reassurance to be given where appropriate. The publication of an information booklet for parents and students is also strongly advised.

Informing the School

The School must also know all the relevant details for a trip. The School Trip Information Form **must** be completed in full and given to the EVC, well in advance of the departure date. For day trips this should be at least one week before the trip departs. For residential trips, where possible the School Trip Information Form should be handed in at least 2 weeks prior to departure so that any concerns or problems that may arise can be sorted out. This form, when properly completed, must contain all the information required about a trip. It will also include a basic risk assessment procedure (see below). **The member of staff leading the trip will ensure that copies of the relevant information are given to the Headmaster, to reception staff and are pinned on the notice board in the staff common room.**

The trip leader must ensure that he/she is in possession of all parental consent forms and all contact number details throughout the trip, as well as Medical Forms. The School Secretary can help with the production of contact numbers if consulted in due time.

The EVC acts as the school contact for the trip. If the EVC is unable to do this, for example for a residential trip during the school holidays, it is up to the **trip leader** to ensure that another senior colleague is designated as the school contact.

Cost of School Trips

Staff must think carefully about the cost of a school trip. Some parents have financial constraints and it must not be assumed that all parents can simply add extras to their school bill. Costs should be kept to a minimum and parents must be given the chance to decline a trip on financial grounds. In such a case provision must be made for the student who cannot go on a trip.

It is very important that the cost of trips is recovered by the school, via the Bursar, as quickly as possible. Indeed, if it is possible to charge for a trip before it has taken place then this should be done. For example, where a cheque is raised by the school to pay for a trip in advance, the trip leader must pass a list of the students on the trip, together with a copy of the letter sent to parents, to the Bursar at the same time as the request for the cheque, so that charges can be added to school bills quickly. Once final numbers are known, any

changes must also be passed through to the Bursar. Delays and/or errors in this process have the potential to create significant problems. **The trip leader must take responsibility for all financial arrangements in connection with the trip.**

It is not good practice for members of staff to handle cheques and cash brought in by students. If money goes missing for any reason, then this can lead to unnecessary difficulties. As far as possible, it is recommended that the cost of a school trip be added to the school bill. The letter sent to parents must make clear the method of payment. If cheques are requested then they must be made payable to St John's College, not to individual members of staff, and handed in or sent to reception. The letter sent to parents must be clear on this point.

Any money left over at the end of the trip cannot be carried forward to the next financial year or to future trips. It must either be credited to parents or, if the amount is too small for this to be practical, credited to the relevant academic department budget.

Supervision, including ratios and vetting checks (for example, DBS checks for volunteers on overnight stays)

There are no exact ratios for school trips. The trip leader must ensure that the staffing for a trip is 'reasonable'. This will depend on the age, gender mix, ability and behaviour of the students involved. It will depend on the type of activity undertaken, the nature of the journey and the type of accommodation if the trip is overnight. The competence of the adults supervising a trip must also be considered, together with the need for first aid cover.

The School advises the following ratios for general activities such as visits to local historical sites and museums or for local walks, in normal circumstances:

- **1 adult for every 3 pupils in Nursery/EYFS (however, a higher ratio may be required depending on the nature of the visit);**
- **1 adult for every 6 pupils in school Years 1 to 3;**
- **1 adult for every 10-15 pupils in school Years 4 to 6;**
- **1 adult for every 15-20 pupils in school Year 7 onwards.**

However, it is stressed that these are only examples. Trip leaders must assess the risks and consider an appropriate safe supervision level for their particular trip.

Trips to remote areas or those which involve more hazardous activities will clearly require a higher level of supervision, for example CCF activities and DofE expeditions, may require different ratios. OEAPNG guidelines must be followed, (<https://oeapng.info>). It is also the case that many institutions which are open for visits by school parties have their own staffing guidelines which need to be adhered to. Staff taking trips must always check with the locations they are visiting about such matters and where possible request electronic copies of their own risk assessments or access them via their website.

When trip leaders are considering the staffing for their trips they must always bear in mind the consequences of staff absences on those left behind. **If several people are required to staff a trip then consideration should be given to using Graduate Assistants and/or Language Assistants as additional helpers.** However, in these cases suitable cover must be available for anyone on a trip. Staff must not assume that Graduate Assistants and

Language Assistants can simply leave school for a day without any consequences for cover arrangements.

If a school trip is taking place which involves several members of staff, each person going on the trip must ensure that the relevant paperwork has been completed. The composition of the staff involved with a trip often changes from the time the initial permission form is submitted. It is very important that the Senior Deputy Head and the Deputy Head Academic know exactly who will be out on trips and that sufficient cover arrangements, for lessons and duties, have been put in place. The trip leader must co-ordinate this process, but **all staff who go on trips must take responsibility for ensuring their lessons and duties are covered appropriately.**

If a trip cannot be fully covered by members of staff, there are circumstances where parents can be used to supervise trips. All adults who supervise school trips should have completed a VBS check. A letter is sent to all parents at the beginning of each school year asking those who wish to volunteer with school trips to complete the necessary paperwork and arrange to come into school to receive training on safeguarding and child protection procedures. Staff who need further guidance and clarification on this matter should discuss it with the EVC during the planning stages for a trip.

Equally, any concerns with regard to staffing or staffing ratios on trips should be referred to the EVC who can give further guidance and advice.

Risk Assessments

A risk assessment is a careful examination of what, in your work, could cause harm to people, so that you can weigh up whether you have taken enough precautions or should do more to prevent harm.

It is not a legal requirement to complete a risk assessment for every activity or trip. Some activities, especially those happening away from school, such as mountaineering, canoeing and sailing, involve higher levels of risk. In these cases an assessment of significant risks should be carried out. The School must ensure that the person assessing the risk understands the risks and is familiar with the activity planned. School employers should take a common sense and proportionate approach, remembering that in schools the purpose of risk assessment and management is to help children to undertake activities safely, not to prevent activities from taking place.

The School Trip Information Form contains a section on risk assessment. For most 'routine' trips the thorough completion of this section is a sufficient process of risk assessment. Any trips involving high risk activities and all trips involving overnight stays require a full, separate risk assessment.

The risk assessment must be based on the following considerations:

1. What are the hazards?
2. Who might be affected by them?
3. What safety measures need to be in place to reduce risks to an acceptable level?
4. Can the trip leader put the safety measures in place?
5. What steps will be taken in an emergency, including contact details and permission for emergency treatment if parents cannot be contacted?

While every trip will have its own particular risks that must be assessed, research has shown that the following are the most commonly found dangers, so are worthy of particular consideration when doing a risk assessment for any trip away from school.

For trips that will involve outdoor or adventurous activities or indeed residential trips, staff are reminded to request copies of risk assessments from the service provider well in advance of the trip and to make reference to these in their own risk assessments.

Hazard	Risk	Control measures
Separation from the party	Getting lost	Regular head count, small groups. Must stay with an adult.
Leaving party member behind	Risk of assault or abduction	Check numbers before every departure.
Road crossing	Being hit by vehicle	All groups to line up parallel with kerb and cross as one. Ensure good sight line. Staff to arrive first at kerbside.
Road traffic	Falling off path into traffic	Keep buffer zone between group and kerb.
Sea/lakes	Drowning	Adults always on waterside. Group maximum of 6. Adults trained.
Sand	Damage to eyes	Students' briefed and strong action at first sign of throwing.
Sun	Sunburn	Hat, sun block, parental letter, supervised use.
Heat	Heat stroke or dehydration	Pre-visit and establish access to shaded area. Plentiful supply of liquids.
Trains	Falling into the path of a vehicle	Keep buffer zone between group and train.

Approved Activity Provider

Using Approved Activity Providers (AAPs)

If the School does not have enough suitably qualified or experienced staff to supervise the Expedition Section of the Duke of Edinburgh's Award then services of an AAP are purchased. The DofE licenses external organisations that provide opportunities for the Expedition and Residential sections. These opportunities have been proven to meet DofE conditions and so can count towards the achievement of an Award. DofE call these partners Approved Activity Partners.

They can be commercial organisations or charities and are usually able to provide a section in its entirety, including accredited assessments and providing assessor reports on eDofE.

Please note that the AAP licence does not guarantee the suitability of an AAP in terms of health and safety or its financial stability. AAPs must meet all of the requirements of the St John's College Trips and Visits Policy, with regards to notifications and qualifications.

Whilst we cannot reject an AAP programme on the grounds of applicability to the DofE conditions, we have the final say on the appropriateness of the health and safety procedures and policies. A list of current AAPs is set out at www.DofE.org/AAP.

If we have concerns about the appropriateness of a programme offered by an AAP, we can report this to the AAP team at the DofE's Head Office, at aap@DofE.org

The Duke of Edinburgh's Award

Students who undertake the DofE Award with the School are provided with additional information regarding Bronze, Silver and Gold Awards depending on which one they are participating in. Communication with students and their parents is thorough and includes the following:

1. Information evening for parents new to the award (early September);
2. Information booklet for each participant (via e-mail);
3. Letters detailing all trips which require written parental consent;
4. Annual progress report (end of autumn term);
5. Invitation to the presentation evening for all participants who have completed the award;
6. Parents have access to the EVC's School mobile number during all expeditions or the nominated home-based contact, normally a member of the senior leadership team.

First Aid Provision

Depending upon the nature of the planned trip or visit, and the subsequent completion of a risk assessment, will inform the trip leader and EVC whether a member of staff with a formal First Aid qualification is required to accompany the trip.

Planning Transport

It is worth making a special point about bus journeys. Most school trips will involve transportation by some type of bus, either a school minibus, hired minibus or hired coach. It is extremely important that staff and students use such transportation safely. **Everyone must wear seat belts at all times.** It is good practice for staff to remind all students of the need for good behaviour before all minibus and bus journeys. Separate guidelines follow in this booklet about the use of school minibuses but staff must remember that the journey is an integral part of a school trip and appropriate risk assessments must be carried out.

The Wearing of Seatbelts in Vehicles

In order to ensure that all journeys by St John's College students are undertaken in the safest possible manner, it is the school's policy that **seatbelts must be worn at all times by all staff and students in cars (including taxis), minibuses and coaches.** All staff and students are made aware of this and are asked to adhere to the policy strictly. We will do everything we reasonably can to enforce this policy.

We therefore ask parents to help us to reinforce this message about the use of seatbelts to students, so that we can continue to ensure the safety of all students when they travel in vehicles.

Reconnaissance Visits

An exploratory visit should be made by a teacher before any trip is undertaken. A key factor in reducing risk is knowledge of the place to be visited. Whilst such visits may not always be practical, staff should make every effort to consider such an undertaking.

A member of staff who is to lead a group abroad, on a residential visit or on an outdoor activity should make a special effort to carry out a reconnaissance visit. If this is not possible then a minimum measure would be to obtain specific information by letter from the venue and from reputable organisations who can provide such information.

It is important to remember that places such as outdoor pursuits centres, leisure centres, museums, theatres, etc., have to carry out their own risk assessments for the facilities they provide. If copies of these are obtained by members of staff then this will reduce the burden of the risk assessment process.

Emergency Procedures

Teachers in charge of students have a duty of care to make sure that the students are safe and healthy. They also have a common law duty to act as a reasonably prudent parent would. Teachers should not hesitate to act in an emergency and to take lifesaving action in an extreme situation.

Emergency procedures are an essential part of planning a school visit. If an emergency happens the priorities are to:

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

Guidance on Emergency Procedures

A copy of the following guidelines must be taken by all party leaders and their deputies.

- Establish nature and extent of the emergency.
- Make sure that all other members of the party are accounted for and safe.
- If there are injuries, establish their extent and administer first aid (if you have been trained or feel capable - but be aware of consequences that might follow were you to give incorrect treatment).
- Establish names of the injured and call relevant emergency services.
- Advise other party staff of the incident and that emergency procedures are in operation.
- Ensure that an adult from the party accompanies casualties to hospital.
- Ensure that the remainder of the party are adequately supervised throughout and arrange for their early return to base.
- Arrange for one adult to remain at the incident site to liaise with emergency services until the incident is over and all children are accounted for.
- Control access to telephones until contact is made with the Headmaster, Deputy Head or Director and until they have had time to contact those directly involved. Pass full details of the incident (name, nature, date and time of incident, location of incident, details of injuries, names and telephone numbers of those involved, action taken so far).

- Telephone numbers for future communication identify alternate telephone numbers in case telephone lines become jammed).
- The school will arrange to contact the parents of those involved. In serious incidents the parents of all party members should be informed.
- Media:
 - A designated person should act as the point of contact with the media to whom all involved should direct questions.
 - Under no circumstances should the name of any casualty be divulged to the media.
- The Party Leader should write down as soon as practicable all relevant details. A record should be made of any witnesses. Any associated equipment should be kept in its original condition.
- Legal liability should not be discussed or admitted.
- All accident forms should be completed and insurers and HSE or Local Authority inspectors should be contacted.
- Inform parents of any delays that will be necessitated.

Additional Procedures for Visits Overseas

Prior to the visit the tour leader should obtain and take with them:

- European Health Insurance Card (where appropriate) and significant medical histories;
- Details of insurance arrangements and the company's telephone number;
- Location of local hospital/medical services.

In the case of an emergency the framework outlined above should operate. In addition the group leader should notify the British Embassy/Consulate.

Procedures for language exchange visits

Prior to the exchange visit the tour leader should check:

- Personal details of all host parents through the Vetting and Barring Scheme (VBS) against the Protection of Children's Act list and the DCSF's list of restricted personnel. St John's College cannot place students with anyone who is included on either list;
- A letter to the Headmaster of St John's College from the head teacher at the host school giving his reassurance that host families have been vetted appropriately or as far as they are able to do so;

After the Trip

The trip leader must inform the EVC (or whoever has been delegated as the school contact) that the party has returned safely and ensure that all the students are safely collected from school by a responsible adult, such as a parent or guardian.

If any difficulties or incidents occur on a school trip, the EVC must be informed as soon as possible after the trip returns to school so that appropriate follow up action can be taken quickly.

Additional Guidelines

Residential Trips Involving Mixed Parties

Staff organising such trips should try to ensure that a male and female member of staff accompanies the party. If this is not possible the spouse of a member of Staff who is willing to accompany the party is acceptable, but this should be discussed in advance with the EVC. If this is not possible, then the matter should be discussed in good time with the EVC before plans are finalised. All adults involved in residential trips require a VBS disclosure before accompanying pupils. This will have been processed on appointment for school staff. Volunteers and other adults will need to have a disclosure application processed in good time before departure. Group leaders must seek permission for adults who are not employed by the school to accompany a trip. This must be sought at least **three months** before the date of departure. Failure to seek such permission is a serious breach of school discipline.

Sixth Form Trips - Making own way to and from venue

Staff organising trips for Sixth Form who make their own way to and/or from a venue must state this fact to parents either in writing or by telephone stating that pupils will not be supervised when they are travelling. Parents need to accept responsibility for the pupils at this time by signing correspondence to that effect or providing consent verbally by telephone. This conversation should ideally be logged.

SCHOOL MINIBUSES

The School currently has school minibuses. They are booked through the School Transport Co-Ordinator, Mr Martin Prendergast, on a '**first come, first served**' basis. There will also be occasions when staff need to hire a minibus. Staff must receive permission for this from the Director of Finance in advance. The guidelines which follow apply to all minibuses, regardless of their origin, including buses hired from outside companies.

The late return of a minibus can cause considerable inconvenience to subsequent users. The school reserves the right if a minibus is returned late (for whatever reasons) that any expense incurred by the subsequent user in making alternative arrangements will be to the cost of the first user or his/her department.

The minibus driver is responsible for ensuring that the bus is not overloaded, that the **students have their seat belts on** and that all doors are properly secured. If a minibus is being used with a roof rack or with a trailer, it is the responsibility of the driver to ensure that all loads are safe. Staff must take great care if they are loading a roof rack or trailer.

The safety of students, drivers and other passengers is of paramount importance and minibuses must be driven accordingly. Staff must exercise all possible caution when driving a minibus and must not drive minibuses when it is potentially unsafe to do so, for example in severe weather conditions. Speed limits and sensible road speeds must be strictly

observed. It should be noted that the performance of a fully loaded minibus is severely constrained, e.g. slower acceleration, longer stopping distances, reduced stability in high winds or on exposed roads, and impaired cornering. The seating capacity and the load capacity must never be exceeded.

As with staffing ratios, there are no exact figures for the number of staff who should be involved in a minibus journey. The level of supervision depends on the type of journey involved. As always, the trip leader must ensure that the staffing for a journey is 'reasonable'. This will depend on the age, gender mix, ability and behaviour of the students involved. It will depend on the nature of the journey and its distance. The competence of the adults supervising a journey must also be considered, together with the need for first aid cover.

Staff must not drive minibuses if they feel excessively tired.

On longer journeys, regular stops should occur and **staff must not drive for more than two hours at a time without a break**. Two staff should be available for longer journeys. Judgements about potential problems with a journey must form part of the risk assessment process which takes place before departure.

If there are any concerns about the vehicle's roadworthiness it **must not** be used and these concerns should be reported to the Transport Co-Ordinator **immediately**. It is the responsibility of the driver to ensure that the bus is clean both before and after a journey.

Under normal circumstances, it is the expectation that a member of the teaching staff will be the driver of any minibus used for a school trip. However, it is recognised that there may be occasions when this is not possible. In such circumstances staff are asked to contact the Senior Deputy Head, who can assist in making alternative arrangements.

Driving a Minibus in the UK

Car licences held before 1 January 1997

If you had entitlement to drive cars prior to 1 January 1997 - shown as group A on an old style licence or as category B and D1 **not for hire or reward** on a new style licence - you can drive a minibus provided:

1. You are 21 or over, the minibus has a maximum of 17 seats (including the driver's) and is not being used for hire or reward.
2. The school does not have insurance for use for hire or reward, and therefore does not permit such use.

New rules from 1 January 1998

Your minibus entitlement will remain valid in the UK and on temporary visits abroad until your licence is next renewed. When this happens, your minibus entitlement (D1 and D1 + E - not for hire or reward) can only be issued if you make a special application which will involve meeting higher medical standards. Similarly if you apply to replace a lost licence, you will find that your entitlement has been lost unless you make an application to maintain it. If your minibus entitlement is not renewed, categories D1 and D1 + E will no longer appear on your licence. However, you may still be able to drive minibuses on the school's **small bus permit**.

Drivers whose licences are due for renewal will receive advice about these new procedures with their renewal reminder letter. DVLA's fact sheet 'Renewing your car driving licence' provides information about the medical standards.

Medically restricted licences

Drivers with restricted medical licences will need to speak to the Director of Estates & Facilities to check whether they are insured to drive minibuses.

Car licences issued from 1 January 1997 and drivers who do not have minibus entitlement (Category D1)

Drivers who first held a licence to drive cars after 1 January 1997 only have an entitlement to drive vehicles with up to 8 passenger seats (see DVLA leaflet INF 28 for further details).

If your driving licence does not allow you to drive minibuses, the school has a **small bus permit** which allows you to do so provided it is not during school hours and in the UK only.

You may drive a minibus with up to 16 passenger seats provided:

- i) you are authorised to drive on behalf of the school but not for hire or reward;
- ii) you are aged 21 or over;
- iii) you have held a car (category B) licence for at least 2 years;
- iv) you are providing your service on a **voluntary** (i.e. not being paid) basis; and
- v) the service must be provided for school students or for groups of people whom the school serves. The service must not be provided to members of the general public and any charges made must be on a non-profit basis;
- vi) the minibus maximum weight is not more than 3.5 tonnes excluding any specialist equipment for the carriage of disabled passengers. Minibuses up to 4.25 tonnes will be permitted in certain circumstances (see below);
- vii) if you are aged 70 or over, you are able to meet the health standards for driving a D1 vehicle.

When driving a minibus under these conditions you may only drive in the UK, you may not receive any payment or consideration for doing so other than out of pocket expenses, or tow any size of trailer.

This means that if you have a licence issued after 1 January 1997 no insurance company will insure a teacher or other employee who is driving the school minibus under the small bus permit during normal school hours.

Maximum authorised mass and specialist equipment

The maximum weight of a vehicle that may be used on the road is known as the maximum authorised mass (mam). It may also be described as the gross vehicle weight or permissible maximum weight. This is normally shown on a plate fitted to the vehicle.

There is no specified method of calculating the weight of specialist equipment such as tail lifts or wheelchair security fittings, but there is an allowance of 750kgs for the extra equipment for minibuses, which are intended for the carriage of passengers with disabilities

or wheelchair users. This would cover minibuses with a max of 4.25 tonnes and would be comparable with the weight threshold which new drivers of cars/light goods vehicles are permitted to drive.

The school minibuses are all under 4.25 tonnes, but if using a hired minibus you must check this.

Use of minibuses for personal or non-school use

In exceptional circumstances, the School may allow its minibuses to be used for non-school use. In such circumstances, the user must pay the full running cost per mile, i.e. the fuel cost and a proportion of annual running costs. Applications should be made to the EVC.

Any concerns regarding the use of school minibuses must be raised with the Senior Deputy Head, in his capacity as Educational Visits Co-ordinator, or with the Director of Finance, in good time before a journey is scheduled to take place.

TRANSPORT OF CHILDREN IN A CAR/MINI-BUS BY A MEMBER OF STAFF

It is an acknowledged practice that teachers, from time to time, transport students in their cars to various external events. However, before doing so staff must seek permission from the Headmaster or the Senior Deputy Head, together with written permission from the child's parents. Staff should refer closely to the school's Safeguarding and Child Protection Policy to ensure that they are not putting themselves or the student at risk of harm or of allegations of risk of harm to a student.

Before a member of staff uses his/her car for transport of children in connection with a school activity for the first time, then such action should be discussed with the teacher's insurers. Clarification **must** be sought that the cover is wide enough to embrace the use of the vehicle in connection with the teacher's/employer's business. Should the answer be in the negative then **in no circumstances** must the vehicle be used to transport children on behalf of the School and the matter should immediately be referred to the Bursar.

Application for an Educational Visit
Involving an Overnight Stay



Glenridding Beck - 10 vital questions

If you are involved - in any way - with an educational visit, you'll want to know the most important questions to ask. The following 10 questions cover the main arrangements that should be in place for a visit.

These questions are important whether you're a parent, child, helper, leader, headmaster or governor. They are equally relevant to visits run by youth organisations.

1. What are the main objectives of the visit?
2. What is "Plan B" if the main objectives can't be achieved?
3. What could go wrong? Does the risk assessment cover:
 - The main activity;
 - "Plan B";
 - Travel arrangements;
 - Emergency procedures;
 - Staff numbers, gender and skill mixes;
 - Generic and site-specific hazards and risks (including for Plan B);
 - Variable hazards (including environmental and participants' personal abilities and the 'cut off' points).

4. What information will be provided for parents?
5. What consents will be sought
6. What opportunities will parents have to ask questions (including any arrangements for a parents' meeting)?
7. What assurances are there of the leader(s) competencies?
8. What are the communication arrangements?
9. What are the arrangements for supervision, both during activities and 'free time' - is there a Code of Conduct?
10. What are the arrangements for monitoring and reviewing the visit?

Policies concerning educational visits.

At St John's College the aim is to ensure that any pupil involved in any educational visit is given maximum supervision care at all times and is not exposed to any hazards, risks or dangers. Visits should be educational and appropriate for the age of the pupils. The following guidelines are based on the document "Educational Visits - A Safety Guide for learning outside the classroom" All Wales Guidance provided by the Welsh Assembly Government and should be read by all members of staff at St John's College before arranging the visit. The document provides valuable information as well as guidance on risk assessment.

There are many types of school visits, ranging from visits to the local library or museum or the weekly swimming lesson at the local swimming pool to the outdoor field trip or overseas visit. Most visits organised by schools take place without incident or injury. This reflects very favourably on the high level of professionalism demonstrated in the preparation and organisation of school visits but, following a number of tragic incidents involving schoolchildren in the last few years, there is growing concern amongst school staff and parents about further ensuring the safety of pupils on school visits. This guidance has been produced in response to that concern with the aim of enabling schools to continue to provide opportunities for school visits with confidence and success. The potential hazards to which the guidance refers should not discourage teachers. The management of health and safety on visits is part of a school's overall policy on health and safety.

No amount of planning can guarantee that a visit will be totally incident free. But good planning and attention to safety measures can reduce the number of accidents and lessen the seriousness of these that do happen.

Planning a visit

- Visit leader should be nominated. This person will have responsibility for the organisation of the visit. This person should seek permission from the Head teacher before any arrangements are made. **STEP 1&2 in booklet.**
- Venues booked, payment details arranged. (If a cheque is required please let the bursar know as soon as possible so that it can be 'drawn up' and avoid delay on the morning), venues should be selected carefully asking for details or facilities and policies for school parties.
- Transport arrangements: This should be done through the school office. Times of collection and return should be decided and the phone numbers of the transport company noted. You should also confirm whether seat belts, toilet facilities are provided and when using the school minibus check tyres, fuel etc.
- A letter should be drafted and sent to all parents. No pupil should be allowed on a school visit unless a consent form or letter has been returned. The letter should quite clearly inform parents of specific activities involved on the visit and more general matters such as cost, lost clothing, pocket money, times of return / departure and the purpose of the visit. Pupils should only be involved in the activities specifically mentioned to parents.
- Staff must complete the standard school educational visit forms. This must then be passed to the Head teacher or EVC for approval. The form must include all the relevant information including visit details and phone numbers, transport details, accompanying staff (ratio is determined by the age, gender of pupils and the nature of the visit), a precise list of pupils attending, times of departures / returns and risk assessment details. The form will be studied and returned with the authorising signature if all details are acceptable. On occasions there may be some concerns and the form will be returned asking for further information e.g. more accompanying staff required or thorough risk assessment details. On acceptance, a copy of this document should be given to the office so that any telephone queries can be dealt with efficiently.
- Medical requirements should also be checked. School records hold details of any pupils who may be asthmatic, diabetic or epileptic for instance. Medication may be required during the visit. In your risk assessment consider the circumstances of such an incident; how far from help would you be? Do you have a mobile phone?
- Let the caretaker know if you are returning or leaving out of school hours. You may wish to leave your car at school and will need to arrange for late access.
- Decide whether school uniform could be worn, as this is an easy way of identifying your party.

- Read the Educational Visits document for clarification of any point, (kept in school office).

During a visit

- Check the quality / safety of the coach and the attitude of the driver. Visit leaders should ensure a full list of pupils is taken. A register should be called before leaving to ensure you know who is with you. Pupils should be seen (perhaps make them stand up) when calling the register. This should be repeated at any such time when pupils are returning to the coach, including service station breaks etc.
- On arrival, ensure all pupils are given details of where and when to return and where to seek help if needed, (for instance becoming lost, or needing medical assistance).
- Under no circumstances should pupils find themselves on their own, partners or groups should be arranged.
- Try to keep to the return times given to parents; allow for traffic congestion etc. If you realise you are going to be considerably late, try to contact the parents with mobile phones.
- On return to the school, staff should ensure all pupils are safely passed back to parents. Staff should remain until all pupils are collected.
- On late returns, pupils should not be allowed back onto the school site unsupervised.

STEP 1

APPLICATION FORM FOR THE APPROVAL OF EDUCATIONAL VISITS AND JOURNEYS BY EVC

Not all sections will be relevant to every proposed visit

School / Group: _____

Group Leader: _____

The group leader should complete this form as soon as possible and present it to the Head teacher or EVC for approval.

If approval is given, one copy should be retained by the EVC and another by the group leader. The head teacher should be informed of any subsequent changes in planning, organisation, staffing. If required, the EVC should seek approval from the school governors or LEA.

1. Purpose of visit and specific educational objectives:

2. Places to be visited:

3. Dates and times:

Leaving:

Returning:

Time:

Time

4. Transport arrangements. Include the name of the transport company:

5. Name of organising company/agency (if any): *(include licence reference number if the body is registered with the Adventure Activities Licensing Authority)*

6. Proposed financial arrangements:

7. Insurance arrangements for all members of the proposed party, including voluntary helpers. *(Include the name of the insurance company):*

8. Accommodation to be used:

Name:

Address:

Telephone number:

Name of head of centre *(if available)*:

9. Details of the programme of activities:

10. Details of any hazardous activity and the associated planning, organisation and staffing:

11. Names, relevant experience, qualifications and specific responsibilities of staff accompanying the party:

12. Names, relevant qualifications and specific responsibilities of other adults accompanying the party:

13. Name, address and telephone number of the contact person in the home area who will hold all information about the visit or journey:

14. Existing knowledge of places to be visited and whether a preliminary visit is intended:

15. Size and composition of the group:

Age range:

Number of boys:

Number of girls:

Adult to pupil ratio:

Leader / participant ratio:

16. Parental consent:

Forms completed:

Not completed:

*If available, please attach copies of any information sheets and the parental consent form /
letter to be sent to parents.*

17. Names of persons with special educational or medical needs:

Signed:

Date:

Group leader full name:

STEP 2

CONFIRMATION FROM EVC FOR VISIT TO GO AHEAD

*To be completed by the EVC. **Please complete STEP 1 before presenting.***

To the group leader:

I have studied this application form and am satisfied with all aspects including the planning, organisation and staffing of this visit. Approval is given.

Please ensure that I have:

- (a) All relevant information including a final list of group members, details on parental consent and a detailed itinerary at least seven days before the party is due to leave.
- (b) Your report and evaluation of the visit including details of any incidents which is to be with me as soon as possible but no later than 14 days after the party returns.

Signed:

Date:

EVC full name:

A copy of the completed application form and details of any subsequent changes should be retained by the EVC. A copy should also be available for the responsible authority, such as the LEA or the governing body.

EMERGENCY CONTACT INFORMATION

(To be completed before the visit. Copies to be held by the group leader and school home contact)

1. School / group:

2. Name of group leader:

Home phone no:

3. Visit departure date:

4. Return information: Date:

Time:

Location:

5. Group:

Total number:

Adults:

Group members:

6. Do you have an emergency contact list for everyone in the Group? YES / NO

(If no, obtain one. If yes, attach it to this sheet)

7. Emergency contact information:

(a) During school hours:

EVC:	Tel:
Deputy / other:	Tel:

(b) Out of school hours:

Head teacher:	Tel:
Deputy / other:	Tel:

(c) Travel company:

Name / Address:	Tel:	Fax:
Company Travel Rep: Name:	Tel:	Fax:
Insurance / Emergency Assistance:	Tel:	Fax:
Hotel:	Tel:	
Address:	Fax:	

(d) Other emergency numbers:

CHECKLIST - AFTER PERMISSION IS GRANTED.

Please ensure completion of the following:

FULL RISK ASSESSMENT

LETTER TO PARENTS - FULL DETAILS OF ACTIVITIES

PUPIL QUESTIONNAIRE

SPREADSHEET OF ALL PARTICIPANTS - CONTACT,
MEDICAL etc.

EVALUATION OF THE VISIT

Model forms are included and may be used.

STEPS TO FOLLOW WHEN ASSESSING RISKS *(example)*

1. Place to be visited (e.g. Paris):

Potential hazards:

- walking in city streets
- travelling by ferry
- loss of passport
- unsuitable hotel

2. List groups of people who are especially at risk from the significant hazards you have identified:

- pupils
- non-teaching staff
- students
- teachers
- group leader

3. List existing controls or note where the information may be found:

- ensure sufficient supervision
- know details of consulate
- clear guidance to pupils
- exploratory visit

4. How will you cope with the hazards which are not currently or fully controlled under (3)?

List the hazards and the measure taken to control them.

5. Continual monitoring of hazards throughout the visit:

Adapt plans and then assess the risks as necessary.

STEPS TO FOLLOW WHEN ASSESSING RISKS (please complete).

1. Place to be visited

Potential hazards:

2. List groups of people who are especially at risk from the significant hazards you have identified:

3. List existing controls or note where the information may be found:

4. How will you cope with the hazards which are not currently or fully controlled under (3)?

5. Continual monitoring of hazards throughout the visit:

PARENTAL CONSENT FOR A SCHOOL VISIT

School/Group:

1. Details of visit to:

From: Date/Time: To: Date/Time:

I agree to my son/daughter (name)

Taking part in this visit and have read the information sheet. I agree to his/her participation in any or all of the activities described. I acknowledge the need for responsible behaviour on his/her part.

2. Medical Information

- a.** Does your son/daughter suffer from any conditions requiring medical treatment?

YES / NO

If YES, please give brief details

- b.** Please outline any special dietary requirements of your child and the type of pain/flu relief medication your child may be given, if necessary:

For residential visits and exchanges only:

- c.** To the best of your knowledge, has your son/daughter been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may be or become contagious or infectious?

YES /NO

If YES, please give brief details

- d.** Is your son/daughter allergic to any medication?

YES / NO

If YES, please specify

- e.** Has your son/daughter received a tetanus injection in the last five years?

YES / NO

MODEL FORM 14
Evaluation of the visit

School / centre / youth group:	Visit leader:
Date(s) of visit:	Purpose(s) of visit:
Venue:	Independent provider (if any):

Number in group: Boys: Girls: Adult supervisors:

Please comment on the following features (if applicable to the visit):

	Rating out of 10 (or n/a)	Comment
Would you recommend this venue/provider to others?	YES / NO	
Pre-visit planning		
Travel arrangements		
Suitability of venue to visit aims and group needs		
Suitability of activities to visit aims and group needs		
Accommodation		
Instruction		
Equipment		
Food		
Evening activities		
Independent provider staff		

Other comments and evaluation including 'close calls' not involving injury or damage - please continue on separate sheet(s) as necessary:

MODEL FORM 15

Checklist for young people going on a visit

	ANSWER
What are the aims of the visit?	
Who is the visit leader?	
Where am I going to visit?	
What activities will I be taking part in?	
What do I need to do to keep myself safe during the visit?	
What should I do if I get lost or get into difficulties during the visit?	
What is written in the code of conduct for the visit?	
What will happen if I break the code of conduct?	
What should I do to keep my money and valuables safe?	
Residential visits only What are the address(es) and telephone number(s) of the places where I'll be staying?	
Visits abroad only What local customs/rules of behaviour do I need to be particularly aware of?	
Other information important for the visit	

ACTIVITY

SKIING / SNOWBOARDING (ON PISTE)

- **Note:** These pages list typical issues above and beyond those listed for **all off site visits** and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
- Leadership awards for this activity are detailed in Annexe 3, Educational Visits
- The Snowsport Wales website provides useful information for those involved in organisation and leadership of skiing www.snowsportwales.net

HAZARDS

- Falls, collisions
- Snow blindness
- Cold related injuries
- Sports injuries
- Effects of altitude
- Avalanches
- Accommodation - fire
- Alcohol/drug abuse
- Accommodation - balconies
- Child protection issues - unsuitable contact/abuse

SAFETY MEASURES

- Leader approved by LA Outdoor Education Advisor and Head/EVC (or AALS licence holder for this activity if using an independent provider);
- Appropriate runs/area of slope used according to ability of young people;
- Appropriate level of supervision for ability/maturity of group;
- Young people should be made familiar with the 'Skiway Code' or similar code of conduct;
- Only qualified individuals to adjust bindings;
- The use of mittens or gloves, long sleeved protective clothing and eye protection is essential;
- Before commencement of the session, it is recommended that pupils should 'warm up';
- Height of resort/upper slopes and potential for altitude problems carefully considered in choice of venue;
- Gradual acclimatisation over period of days, if required;
- Ensure adequate fluid intake;
- Any individual showing signs of altitude problems to descend immediately and medical advice sought;
- Group ski within piste area and follow any advice/requirements at resort re areas to avoid;
- Adequate fire detection, alarm and evacuation systems in place;

- Fire drill practice carried out for whole group on arrival;
- Rules re smoking and naked flames in rooms understood by all group members;
- Young people, staff and parents/carers aware that drugs/alcohol not permitted;
- Young people/parents/carers understand sanctions if alcohol/drug rules are broken;
- Accommodation selected without balconies or group briefed and supervised re dangers of balconies;
- Accommodation and timing of visit chosen to minimise risk of 'stranger danger';
- Security of accommodation and bathroom facilities appropriate for group.

NOTES

- **At least one of the party leaders should hold the SCO Award or have extensive experience of leading ski trips. Visit leaders who supervise skiing are strongly advised to hold the Alpine Ski Leaders Award (formerly the SCOI).** Ski tour companies may offer attendance on these courses in place of inspection visits.
- Visit leaders are advised to opt for full instructional provision of 4 or 5 hours per day.
- The use of helmets with novice skiers is increasing annually. There are arguments for and against but perceived good practice changes over time; in future the use of helmets for young people may be the norm - in some countries they are mandatory. Parents may wish to make an informed choice as to whether or not their children wear helmets.
- An exploratory inspection visit by the visit leader is highly desirable.
- Accidents on skiing visits often happen outside of skiing activities. Tobogganing, sledging, 'poly bagging' and ice-skating all have their associated safety issues that should be carefully considered before inclusion in a programme.
- Serious accidents and fatalities have occurred as a result of misuse of hotel balconies or windows. Balconies and windows also present possible unauthorised entry and exit points for pupils and/or unwelcome visitors.

Staff supervised ski sessions: The following guidelines should be applied:

- Staff supervised skiing must be led/supervised by appropriately qualified staff (see [Annex 3](#) for relevant qualifications);
- Staff supervised sessions usually take place following formal instructional sessions, normally towards the end of a skiing day. It is essential to recognise the likelihood of fatigue and plan accordingly;
- Young people learn and improve rapidly. Adults supervising skiing must have sufficient skill, experience and fitness to cope with this rapid development.

APPLICATION FOR AN EDUCATIONAL VISIT

Visit leader:	Date:	Class/year	
Destination address & contact telephone no.	Depart:	No. of pupils	
	Return:	Accompanying staff:	
	Transport details:		

Purpose of visit and details of activities:

Have any of the participants any special educational or medical needs? YES/NO <i>If 'yes', what arrangements are in place to support them? (Continue on separate sheet if necessary).</i>
--

<u>Risk Assessment Plan</u> <i>Please consider any possible hazards that may be encountered on your visit. This should be supported by actions to be taken to minimise the likelihood of an incident.</i>	
Potential Hazard	Action to be taken
Person Responsible for First Aid	

Please read all policies and guidelines regarding school visits before completing this form.

*Applications must be made a minimum of **2 weeks** prior to the visit.*

Please attach a list of pupils who will be going on the visit along with a copy of the consent letter to be sent to parents.

The separate booklet should be completed for visits involving an overnight stay.

A leave of absence form should be completed for each member of staff on the visit.

Please give a copy of the application to the EVC for approval.

I understand that the law demands a duty of care such as would be taken by a caring parent:

Signature of visit leader: _____

Approval: _____ ***EVC***

Evaluation:

Educational visits

A safety guide for learning outside the classroom

All Wales guidance

2010

Published by Welsh Assembly Government 2008



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Introduction

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1 All Wales guidance

This document sets out a common framework for the management of educational visits across all Local Authorities in Wales. The guidance embraces the Health and Safety Executive's principles of sensible risk management by seeking a balanced view that considers both the benefits and risks associated with visits and activities. The Welsh Assembly Government, Health and Safety Executive and Outdoor Education Advisers' Panel (Wales) will work in partnership to keep this guidance up to date with new practices and lessons learned from incidents – in Wales or beyond.

Local Authorities can adopt this guidance in full or can review and update local procedures to ensure that they reflect the guidance in this document. They should strive to avoid placing any additional requirements for visit planning and approval on their educational establishments and visit leaders. They can do so confident in the knowledge that they are following good practice that is shared across the whole of Wales. Enquiries about the contents of this guidance should be addressed to Vincent Doyle by email: vincent.doyle@wales.gsi.gov.uk or telephone: 01443 663913.

In Wales this document incorporates and supersedes previous guidance *Health and Safety of Pupils on Educational Visits* (HASPEV) and the subsequent supplements to HASPEV. With input from all sectors, it reflects good practice in all types of educational visit – no matter who is doing the providing or who the learning.

Good practice can take a number of forms: this document outlines one approach and should not be taken as an authoritative interpretation of the law. Others may also be acceptable within the legal framework that underpins the responsibilities associated with educational visits.

The guidance is intended as a reference document – not to be read as a book from cover to cover by all staff. The Educational Visits Coordinator (EVC) has an important role to play in ensuring that local school/centre practice follows this guidance.

Educational Visits Coordinators (EVCs) will be informed directly by the LA/Outdoor Education Adviser of any future additions or amendments to this document. It is the responsibility of the EVC to update any hard copies of the guidance kept by schools/centres and to inform school/centre staff of the changes. For this reason, it is recommended that any hard copies be kept in loose-leaf file format. The guidance can be viewed and downloaded at www.wales.gov.uk/healthandsafety

2 Scope of the guidance

The guidance in this manual is relevant to any occasion in which young people leave the school/centre site or similar educational establishment/facility for any activity or visit whilst legally in the care of a LA educational establishment.

In Voluntary Aided and Foundation Schools, the governing body has the responsibility for Health and Safety including educational visits. The governing body may choose to retain all responsibility or to join the LA in a partnership to follow this document in its entirety. Written notification of the decision taken by the governing body in this respect should be sent to the LA's Director of Education (or equivalent).

3 **Glossary of terms**

- **Young person** - all children, pupils, young people, students and youth club members for whom the activities are provided and for whom the LA has a duty of care
- **Adult volunteer** – all adults who help on a visit with the permission of the Head but who are not employees of the school/centre
- **Teacher/youth worker** – including teachers, youth workers, lecturers, higher level teaching assistants, learning support assistants, early years practitioners, peripatetic employees and others who are employed by the school/centre
- **Group leader** – staff and/or volunteers who will supervise a sub group of the whole party
- **Visit leader** – a named person who will plan, prepare and lead the visit.
- **EVC** – the Educational Visit Coordinator who oversees the approval mechanism within the school/centre for all visits. The functions of the EVC are detailed in [Section B6](#).
- **Head** - all Headteachers, Principals, Directors, Senior Youth Workers, Centre Heads and all others who are in charge of a school/centre
- **Governor** - this term is used for Governing Bodies, Management Committees, or any group of persons exercising a management function for an LA school/centre

The benefits of educational visits

Educational visits offer an invaluable opportunity to enrich young peoples' learning, raise their self esteem, increase their motivation and appetite for learning and raise levels of achievement in many aspects of their life and education.

Visiting new areas and exploring new environments broadens young peoples' horizons and can deepen awareness of their own and others' abilities and needs. Visits can also improve understanding between young people and their leaders and this frequently results in improved working relationships on return to the classroom, youth club or centre.

Educational visits often provide the most enjoyable experiences and enduring memories from school days. Residential experiences, in particular, offer unique opportunities to encounter the practical realities of living together away from home, family and familiar surroundings. They provide a powerful vehicle for developing self-awareness and social skills.

Adventure activities provide situations in which young people can gain personal fulfilment whilst developing the skills of co-operation, communication and teamwork. They can boost self-confidence and can open the door to a lifetime's enjoyment of the outdoors.

Illness and conditions associated with inactivity currently pose a serious threat to the nation's health. Engaging young people in healthy, fulfilling activity is vitally important if we are to tackle the rise in obesity, heart disease and diabetes.

Wales has an outstanding natural environment and a vibrant, unique culture. Tourism and the outdoor industry are an increasingly important sector of the economy in Wales. But for many people in Wales this natural environment has traditionally been seen as a playground for visitors. This has created a barrier to participation for generations of local people and a consequent skills gap for those wishing to take up a career in this sector. We have a key role to play in creating opportunities for young people to take part in activities that can provide them with the skills and experience for a wider range of employment opportunities and life chances. Hand in hand with this comes a responsibility to educate young people about the fragility of the environment and about ways in which they can minimise their impact.

Visits, and particularly those to demanding environments or involving adventure activities, also provide an effective means to develop the ability of young people to recognise and manage risk sensibly: to enjoy the outdoors while keeping themselves and others safe.

Learning outside the classroom is a strong theme that runs through all stages of education in Wales – from the Foundation Phase through the curriculum at Key stages 2-4 and into 14-19 education. Schools, youth services and their employees have a central role to play in delivering and providing access to high-quality educational visits. They may provide visits within curriculum time or longer trips to develop specific curricular subjects in the UK or abroad. They frequently offer out-of-school-hours learning opportunities through school clubs or The Duke of Edinburgh's Award. Many organise day and residential visits to outdoor education centres.

The Welsh Assembly Government recognises the contribution of teachers and youth workers across Wales who lead and assist on educational visits every year. This guidance sets out primarily to support them in this invaluable work.

Responsibilities for visits

[Legal framework](#)
[Visit approval/notification procedures](#)
[Role of the LA/outdoor education adviser](#)
[Role of the governing body](#)
[Role of the Head](#)
[Role of the Educational Visits Coordinator \(EVC\)](#)
[Role of the LA in relation to EVCs](#)
[Role of the visit leader](#)
[Role of the teacher/youth worker and other LA employees](#)
[Role of the adult volunteer](#)
[Role of the young person](#)
[Role of the parent/carer](#)

B1 Legal framework

Under the **Health and Safety at Work etc Act 1974** employers are responsible for the health, safety and welfare at work of their employees. Employers are also under a duty to ensure, as far as is reasonably practicable, the health and safety of anyone else who may be affected by their activities. This includes participants in educational visits.

Employers are the LA in all LA maintained schools and youth services. The governing body is the employer in voluntary-aided and foundation schools. The owner, governors or trustees are the employers in independent schools.

The Management of Health and Safety at Work Regulations 1992 (updated 1999), made under the 1974 Act, require employers to:

- assess the risks of activities (see Risk management in [Section C9](#));
- ensure that measures to control those risks are adequate.

This includes telling employees about safety measures along with reasonable measures to ensure that these are followed and implemented. The 'reasonable' requirement will generally be satisfied by monitoring arrangements 'in the field' until the employer is satisfied that there is reasonable understanding of what needs to be done, and to be reasonably satisfied that it is being done. It is not necessary to monitor the performance of every employee on every activity, but by a process of targeted and random monitoring (and revision of practices as appropriate) the employer can be satisfied that there is general understanding and compliance with the employer's wishes;

Also under the Health and Safety legislation employees must:

- take reasonable care of their own and others' health and safety;
- co-operate with their employers over safety matters;

- carry out activities in accordance with training and instructions;
- inform the employer of any serious risks.

These duties apply to all activities, including educational visits. Teachers/youth workers and other staff in charge of young people also have a common law duty of care to act as any reasonably prudent parent would do in the same circumstances.

Education law empowers employers to ensure compliance. More detailed guidance on legal responsibilities and powers is given in [Annex 1 Health and Safety: Responsibilities and Powers](#). This legal framework underpins the guidance set out in this document.

B2 **Visit approval/notification procedures**

In order to comply with B1 above, it is common practice for all visits to require internal approval (usually by the Head/EVC) according to school/centre procedures. In addition, many LAs require LA notification or approval for certain types of visits.

Please refer to [Section P](#) of this guidance for details of approval/notification procedures.

B3 **Role of the LA/Outdoor Education Adviser**

As employer, the Local Authority (or other similar employer) is responsible for the actions of its employees whilst acting in the course of their employment. By association, this includes the safety and well-being of employees, young people in its care and volunteers during educational visits.

To ensure these responsibilities are met, the LA can:

- **either** employ an **Outdoor Education Adviser** to carry out the following functions **or** include the following functions within the job description of a member of LA staff. In either case, the staff fulfilling this role must be given adequate **time and resources** to fulfil the following functions:
 - ☐ provide expert advice on safety and quality in visits generally and on visits involving adventure activities, demanding environments and overseas expeditions specifically;
 - ☐ develop and promote educational visits within the LA;
 - ☐ ensure that adequate and appropriate training is available and taken up by relevant employees;
 - ☐ ensure that EVCs, visit leaders, other school/centre staff and other adults involved in

educational visits are assessed as competent in their specific tasks;

- ☐ approve LA employees who wish to lead activities that require LA approval and hold a register of these leaders;
- ☐ monitor the educational visits carried out by the LA's schools/centres, including visiting schools/centres on a sample basis and practical observation of educational visits;
- ☐ monitor and support the work of Educational Visit Coordinators (EVCs) in schools/centres to help to identify training needs and appropriate levels of delegation;
- ☐ approve (or disallow) visits for which LA approval is required;
- ☐ ensure that LA policy reflects the guidance in this document;
- ☐ provide schools/centres with the LA's statement of policy and guidance;
- ☐ make sure that arrangements are in place to obtain the necessary Criminal Records Bureau disclosures or otherwise vet prospective employees, such as interviews, references, and self-declaration about suitability for the post.
- ☐ make sure that arrangements are in place for informed parent/carers consent;
- ☐ review policies and procedures in the light of lessons learned and inform schools/centres of any changes.

In order to fulfil these functions, the Outdoor Education Adviser ought to be experienced in education, teaching or youth work and must occupy a position of sufficient authority in the LA to influence change and people. He/she ought to have:

- a good understanding of the legal responsibilities and powers of the LA and its schools/centres for all kinds of educational visits;
- a good knowledge of the practical difficulties facing school/centre groups in all venues or environments including the lower risk ones;
- competence to assess the risks associated with the visits that their schools/centres undertake.

Where some or all of these are not possible the employer would need to ensure that appropriate advice was both available and sought.

In addition, the LA must:

- provide an emergency support service;
- monitor accidents and incidents across the LA;
- maintain specified insurance cover.

B4 Role of the governing body

It is good practice for governing bodies to;

- ensure that the school has a rich, varied and progressive programme of opportunities for pupils to learn outside the classroom;
- ensure that the Head and the EVC are supported in matters relating to educational visits and that they have the appropriate time, training and support to fulfil their responsibilities;
- ensure that the school has a formal system for the induction and training of visit leaders (as defined in [Section D2](#));
- ensure that this guidance manual informs the school's policy, practices and procedures relating to the health and safety of young people on educational visits. These should include measures to obtain parent/carer consent, to investigate parent/carer complaints, and to discuss and review procedures including incident and emergency management systems. As necessary governors may seek specialist advice, though governors should not normally be expected to approve visits;
- ascertain what governor training is available and relevant;
- agree on the types of visit they should be informed about;
- ask questions about a visit's educational objectives and how they will be met. The Governors should challenge the nature of the venture when the educational objectives are not clear or where the means to meet them do not appear to be realistic. It is not expected that governors should become directly involved in risk assessment and related matters unless they have an appropriate competence. Governors offering technical or professional advice to schools, should be aware that their professional indemnity insurance is unlikely to cover them for unpaid advice;

- ensure that visits are approved as necessary by the LA (as defined in [Section P](#) of this guidance) before bookings are confirmed;
- help to ensure that early planning and pre-visits can take place and that the results can be acted upon. Note – some complex or costly ventures (e.g. overseas expeditions) can require up to a 12-18 month planning period before departure;
- ensure that bookings are not completed until independent providers have met all the necessary assurances;
- ensure that the Head and the EVC have taken all reasonable and practicable measures to include young people with special educational needs or medical needs on a visit;
- determine its procedures for responding in the unlikely event of a major emergency.

Where the governing body is the employer the governors' responsibilities will also incorporate the responsibilities listed for the LA/Outdoor Education Adviser in [B3 above](#).

B5 Role of the Head

The Head is responsible for ensuring that Governing Body and LA policy is implemented and that all activities are properly planned and appropriately supervised by a competent person.

In schools/centres where there is no Governing Body, the Head assumes the responsibilities listed in [paragraph B4](#) above.

It is good practice for Heads to ensure that they:

- provide a rich and varied programme of opportunities for pupils to learn outside the classroom within the school/centre. The programme of visits should be structured and progressive to gradually develop young peoples' confidence, independence and responsibility during the time that they are in the care of the school/centre;
- make sufficient time and resources available for the EVC to arrange induction and training of staff and volunteers appropriate for the visit. This needs to include opportunities for staff to develop competence in dynamic risk management by assisting more experienced colleagues on a range of educational visits and by attending relevant training courses (see [Section D2](#));
- delegate tasks to the EVC, having regard to the duties of the EVC suggested in B6 below;
- agree who will give signed approval for visits at school/centre level and who will submit to the LA for notification/approval if so required (as set out in [Section P](#) of this guidance);
- consider adopting/adapting the model forms in [Section Q](#) of this guidance manual;

- ensure that arrangements are in place for the governing body to be made aware of visits;
- ensure that arrangements are in place for educational objectives of a visit to be inclusive, to be stated in the pre-visit documentation, and to be made known to all relevant parties;
- ensure that any issues identified by exploratory visits have been satisfactorily resolved prior to approving the visit;
- ensure that accreditation or verification of independent providers have been checked;
- ensure that the EVC keeps him or her informed of the progress of the visit and that this information is related to governors (and to parents/carers as necessary);
- check that the EVC has designated an appropriately competent visit leader who will meet the LA's criteria for ensuring the best interests of the child. The Head should make a judgement on a member of staff's competence and suitability to lead a visit. It should be borne in mind that discipline on an educational visit may, at times, have to be stricter than in the school/centre;
- ensure that there is a contingency plan (plan B), covering, for example, the implications of staff illness and the need to change routes or activities during the visit;
- arrange for the reporting of accidents and incidents as required. Records of these should be reviewed regularly, and this information used to inform future visits;
- help to ensure that serious incidents and accidents are investigated;
- are clear about their role if taking part in the visit as an assistant leader. They should follow the instructions of the visit leader who will have sole charge of the visit;

and that:

- adequate and proportionate child protection measures are in place;
- risks have been assessed and appropriate safety measures are in place;
- the visit leader or another leader is familiar with the location where the activity will take place;
- visit leaders are allowed sufficient time to organise visits properly;
- the suitability, number and competence of all adults accompanying or instructing the party;
- appropriate communication with parents/carers has taken place regarding the visit and consent has been received in writing if necessary;
- arrangements have been made for the medical needs and special educational needs of all young people;
- adequate first aid provision will be available;

- the mode of travel is appropriate;
- travel times out and back are known including pick-up and drop-off points;
- there is adequate and relevant insurance cover (see [Section K Insurance](#));
- they have the address and phone number of the visit's venue and have a contact name;
- proper and effective support structures in the event of difficulty or emergency including means of contacting the LA Education Officer (Schools) or Principal Youth Officer (Youth Service) or emergency planning team;
- School/centre staff on the visit are briefed in and understand the educational aims of the visit, the plan to be followed, the alternatives should this not be possible, and the emergency procedures in the unlikely event of a serious incident;
- that visit arrangements and outcomes are evaluated to inform future visits and staff training needs.

Visit procedures should be reviewed periodically in order to ensure that they reflect the current thinking of the Governing Body or school/centre and are up to date in relation to staff changes.

B6 Role of the Educational Visits Co-ordinator (EVC)

It is good practice for each school/centre to have an Educational Visits Coordinator (EVC). Due to the nature of the role an EVC must:

- be an experienced member of staff;
- have a background in education or youth work;
- be capable of influencing the senior management team within the school/centre.

The level of competence required by the EVC will relate to the size of the school/centre and the types of educational visits proposed.

The EVC is the routine contact for dialogue with the LA Outdoor Education Adviser. Unless explicitly delegated to an EVC, these responsibilities would rest with the Head.

The functions of the EVC are to:

- liaise with the employer to ensure that educational visits meet the employer's requirements;
- support the Head and Governors with approval decisions;
- assign competent people to lead or otherwise supervise a visit;
- assess the general competence and supervisory ability of leaders and other adults proposed for a visit. This may include practical observation or verification of experience. For visits that require LA approval, the Outdoor Education Adviser will assess a leader's technical competence in that activity/environment (see also [Section P3 LA leader approval](#)).

- organise the selection, induction, monitoring and further training of leaders at the educational establishment. This needs to include opportunities for leaders to develop competence in dynamic risk management by assisting more experienced colleagues on a range of educational visits. It will also commonly involve training such as first aid or leader training;
- carry out occasional monitoring of visit leaders to identify further training needs;
- ensure that Criminal Records Bureau checks are in place as necessary;
- work with the visit leader to provide parents/carers with information about the visit and obtain the consent or refusal of parents/carers for their child to take part in the visit if necessary;
- ensure that emergency arrangements and emergency contact(s) are in place for each visit;
- keep records of individual visits including what worked well, what didn't and any accident/incident reports;
- review systems and monitor practice.

Important note: functions listed above which are administrative in nature may be delegated to an appropriate member of school/centre staff. The responsibility to ensure that these functions have been carried out would generally remain with the EVC unless agreed otherwise.

B7 Role of the LA in relation to EVCs

The role of EVC will work best when the LA Outdoor Education Adviser:

- works with the Head to assign a member of staff to EVC duties and ensures that this member of staff undergoes EVC training and is kept up to date through update training as required;
- gives advice and guidance to the EVC;
- helps the EVC give access to specific training for staff leading or otherwise supervising educational visits;
- ensures relevant risk assessments are completed, proportionate, up to date and in accordance with LA guidance and that the EVC is aware of their findings;
- monitors the work of the EVC.

B8 Role of the Visit leader

The visit leader has delegated responsibility for the supervision and conduct of the visit (overall responsibility lies with the employer). The visit leader must:

- ensure that the planned visit and activities are suitable for the group;
- obtain the Head/EVC's written approval for the visit according to school/centre policy;

- ensure that all accompanying adults, whether employees or volunteers, are given responsibility within their level of competence and have been briefed on the purpose of the visit and their roles and responsibilities;
- be able to control and lead young people of the relevant age range in the proposed activity;
- obtain LA leader approval if leading any visit for which LA approval is required as detailed in [Section P3](#) of this guidance;
- be aware of child protection issues and introduce measures to protect children as required;
- ensure that appropriate first aid cover will be available;
- undertake and complete the planning and preparation of the visit, including the briefing of group members and parents/carers;
- identify significant hazards and safety measures to reduce risk to an acceptable level, and to make known to parents/carers, the Head and others the level of residual risk that needs to be managed;
- review regularly undertaken visits and advise the Head/EVC where adjustments may be necessary;
- have enough information about the young people to assess their suitability for the visit or be satisfied that their suitability has been assessed and confirmed;
- ensure the ratio of staff to young people is appropriate for the environment/activities and the needs of the group;
- carry out dynamic risk management while the visit takes place and consider stopping the visit if the risk to the health or safety of the young people is unacceptable and have in place procedures/alternative plans for such an eventuality;
- arrange for clearly understood delegation in his/her absence;
- make appropriate and adequate preparations for emergencies in conjunction with the EVC and ensure that all accompanying leaders are familiar with these procedures;
- ensure that group leaders and other leaders/instructors have details of young person special educational or medical needs which will be necessary for them to carry out their tasks effectively;
- carry out an evaluation of the visit on return to base to help to inform future visits.

B9 Role of the teacher/youth worker and other LA employees

Teachers/youth workers and other LA employees assisting the visit leader on school/centre-led visits act on behalf of their employers at all times during the visit. They should do their best within their level of experience and training to ensure a successful and beneficial outcome of the visit for everyone in the group. As such they must:

- follow the instructions of the visit leader and help with control and discipline;
- be briefed on and understand the educational purpose of the visit, its proposed programme, any adjustments to that (i.e. Plan B's), and the emergency procedures to be followed in the unlikely event of a serious incident or accident;
- be briefed on and understand the expectations of them and the limits of their responsibilities;
- have a good knowledge of the young people on the visit and their needs;
- consider stopping the visit or the activity, notifying the visit leader, if they think the purpose of the visit is being compromised or if the risk to the health or safety of the young people in their charge is unacceptable.

B10 **Role of the adult volunteer**

Volunteers who are not employees of the LA must:

- do their best to ensure the successful and beneficial outcome of the visit, its proposed programme, and alterations to that which may become necessary (i.e. Plan B's), the health and safety of everyone in the group including the emergency procedures to be followed in the unlikely event of a serious incident or accident;
- be briefed on and understand the expectations of them and the limits of their responsibilities;
- be briefed on and understand their relationship to others on the visit: the young people, teachers/youth workers and other LA employees and the visit leader;
- have a reasonable knowledge of the young people on the visit and their needs;
- follow instructions from the visit leader and help with control and discipline;
- not be left in sole charge of young people unless this has been risk assessed by the visit leader;
- raise concerns for young person welfare with the visit leader.

Heads should carefully consider the role/responsibilities of an adult volunteer who is also a parent/carer of one of the young people on the visit. See [Section D5](#) for more details.

B11 **Role of the young person**

Young people should be made aware of the educational purpose of the visit, its proposed programme, any adjustments to that (i.e. Plan B's), the emergency procedures to be followed in the unlikely event of a serious incident and their responsibilities in achieving a beneficial and successful outcome. In particular, young people must be required to:

- follow instructions of the visit leader and other members of staff including those at the venue

of the visit;

- dress and behave sensibly and responsibly;
- look out for anything that might hurt or threaten anyone in the group and tell the visit leader or other member of staff about it;
- take no unnecessary risks;
- if abroad, be sensitive to local codes and customs;
- agree to and follow a code of conduct for the duration of the visit.

Any young person whose behaviour may be considered to be a danger to themselves or to the group may be stopped from going on the visit. The curricular aims of the visit for those young people should be fulfilled in other ways wherever possible.

B12 ***Role of the parent/carer***

Parents/carers have an important role in taking an informed decision on whether any visit or off-site activity is suitable for their child. The visit leader must ensure that parents/carers are given sufficient information about the visit and are invited to any briefing sessions. The visit leader should also tell parents/carers how they can help prepare their child for the visit by, for example, reinforcing the visit's code of conduct. Parents/carers should also be asked to agree the arrangements for sending a young person home early and who will meet the cost.

Special arrangements may be necessary for parents/carers who are not fluent English or Welsh speakers.

Subject to their agreement, parents/carers must:

- inform the visit leader about any medical, psychological, emotional or physical condition of their child relevant to the visit;
- give or refuse consent for non-school visits or school visits that take place outside the school day by completing the consent form;
- provide details of where they can be contacted in emergency or if a party or individual has to return earlier than planned.

Planning the visit

[Purpose of visit](#)
[Choice of venue/activity](#)
[Exploratory visit and research](#)
[Programme/itinerary](#)
[Ancillary activities](#)
[Weather](#)
[Clothing and equipment](#)
[First aid](#)
[Risk management and risk assessment](#)
[Financial planning](#)
[Charging for visits – schools](#)
[Selection and checking of residential accommodation](#)
[Planning a visit: flowchart](#)

This section gives general planning guidance for all visits. Whatever the visit, it is essential that formal planning take place before setting off. This involves considering the educational aims, the programme and itinerary to support these aims, the dangers and difficulties that may arise and the measures necessary to reduce these. See also the activity pointer for general visits in [Annex 4](#).

In practice, the Head - who retains ultimate responsibility for all off-site visits - will often delegate planning to the visit leader. Heads must satisfy themselves that the person planning the visit is competent to do so and has the necessary support and relevant experience.

The flowchart at the end of this Section ([C13](#)) and the checklist in Section Q, [model form EV7](#) are provided as an aide-memoir for visit planning.

C1 Purpose of visit

Aims and objectives of the visit should be clearly identified at an early stage. These should be relevant to young people and their development, taking account of age, ability, competence, previous experience and resources available.

Whatever the reason for going, having a clear purpose and plan will help the group to get the most from the experience – and will help to maintain safety.

Clear objectives will help to ensure:

- appropriate contribution to the overall aims of the school/centre;
- appropriate structure and discipline for the visit;
- young person motivation;
- a choice of environment and activity appropriate to the young people;

- consideration of appropriate training, staffing and resources.

C2 Choice of venue/activity

Factors influencing the choice of venue/activity include:

- educational objectives of the visit;
- age, maturity, experience, behavioural or special needs and fitness of young people;
- competence of leaders;
- familiarity of leaders with the venue;
- the time of year, weather, daylight hours and time available;
- environmental conditions on the day – weather, river levels etc.

Visit leaders should seek local knowledge of facilities that could contribute to the success of the visit as well as potential difficulties and hazards.

C3 Exploratory visit and research

There is no substitute for firsthand, up to date information.

An exploratory visit is considered highly desirable on both educational and safety grounds for all visits, but in particular for:

- visits to be led by less experienced staff;
- visits to unfamiliar terrain or location where the activity is to be LA employee-led;
- visits involving very young people or those with special needs;
- visits to locations or involving activities where there may be unusual hazards.

An exploratory visit will give the visit leader greater confidence in his or her ability to supervise the young people. Leaders familiar with a destination can concentrate on the needs of the group.

During the exploratory visit, the visit leader should (where applicable):

- check the appropriateness of the venue and activities according to young people needs, staff competence and educational objectives of the visit;
- identify other suitable options (plan B) in case the original plan has to be abandoned for any reason;
- note potential hazards and the safety measures they will need to introduce to manage risks;
- become familiar with the area before taking a group of young people there;

- check timings (local transport, lengths of walks, tides etc.);
- establish local contacts;
- check accommodation, especially for security, fire-hazard and evacuation;
- agree in advance, between visit leaders and activity provider, the division of supervisory responsibility;
- obtain information on local services (e.g. places of interest, locations of doctor, hospital, toilets);
- establish an appropriate emergency action plan in the unlikely even of a serious incident or injury.

If in the last resort an exploratory visit is not possible then the visit leader will need to consider how to complete an adequate assessment of the benefits and suitability of the venue and of the risks associated with it. The Head/EVC (or Outdoor Education Adviser for visits that require LA approval as defined in [Section P](#)) will want to be satisfied that alternative arrangements are sufficient for an assessment to be made. Such alternatives might include obtaining advice from those with experience gained from previous visits; heeding reports of previous visits; the use of experienced and reliable local guides where appropriate.

If no exploratory visit has been made, a thorough check should be made on arrival to ensure that prior assumptions about the venue are accurate. This check should be programmed and staffed appropriately. Contingency plans must cover action to be taken in the event that the venue is unsuitable.

Many establishments take new groups of young people to the same location each year. As some factors will change from year to year, it is prudent to re-assess whether the services and facilities have remained the same and whether any further risks have evolved - even when the visit leader stays the same.

C4 Programme/itinerary

A detailed programme/itinerary should be established with appropriate supervision at all times. Leaders should:

- beware of being diverted unintentionally from the planned programme;
- not be led astray, by group enthusiasm or other influences, into inappropriate situations;
- not depart from the planned programme without first assessing the appropriateness of alternatives in terms of meeting the educational aims of the visit and competence of the staff and pupils to deal with the new activity. This can be difficult when in charge of the group on the day and it is therefore recommended that visit leaders consider alternatives and options

during the planning stage.

All supervisory staff and young people should be aware of the intended programme, including the possibility that the planned activities may need to be changed if conditions require it.

C5 Ancillary activities

Visit leaders may wish to organise, or permit participation in, ancillary activities that are not central to the visit. Details of ancillary activities that the group might take part in should be included in information sent to parents/carers.

It must be noted that the majority of serious incidents during educational visits have occurred during ancillary activities or during 'downtime' (see also Section G5 [Downtime arrangements](#)). Leaders must therefore carefully consider the risks associated with such activities and plan, organise and supervise accordingly prior to allowing the young people in their care to participate.

C6 Weather

The effects of weather can be crucial to learning, comfort and safety during outdoor visits. Where this is the case, leaders should obtain a local, current forecast to inform decisions on appropriate activity, venue, route, clothing and equipment for the visit. On multi-day visits, visit leaders should ensure that they are able to access a local weather forecast wherever possible.

C7 Clothing and equipment

All parties must be clothed and equipped appropriately for:

- the activity and location;
- the time of year and expected weather.

Where clothing and equipment play a critical role in comfort and safety (e.g. adventure activities or visits to remote or exposed areas) leaders should check that the group have essential items before departure and that a contingency is available if they do not.

Contingency equipment may be necessary in the event of moving to plan B, and emergency equipment may need to be carried depending on the activity, location, remoteness and time of year. In more remote locations, leaders may need to plan for:

- the long term comfort and care of a casualty and the group (group emergency shelters are recommended for remote/exposed areas);
- the provision of emergency food and drink;
- methods to call for assistance (due to signal uncertainty and battery life, mobile phones should not be relied on alone).

Visit leaders may wish to ask parents/carers to specify which mild analgesics (e.g. calpol/paracetamol/aspirin) may be given to young people if suffering from pain, or similar.

C8 **First aid**

Visit leaders must ensure access to first aid cover at an appropriate level: the extent and nature of first aid required will depend on the group, visit location, planned activities, the risks identified and the availability of external first aid cover or medical assistance.

If you are operating away from a site with first aid cover it is good practice to carry a first aid kit appropriately stocked to cope with likely injuries and for one of the leaders to have a good working knowledge of first aid.

For visits where there is no access to external first aid cover, or where remoteness/difficult access will lead to a significant delay before the emergency services could attend, one of the leaders should hold an up to date first aid certificate or qualification appropriate to the environment and activity. Suitable emergency equipment should be carried to keep the rest of the group comfortable while the casualty is cared for (e.g. group survival shelter in exposed locations).

All adults in the group should know how to contact the emergency services.

All minibuses are required by law to carry a first-aid kit.

C9 **Risk management and risk assessment**

During the early planning stages for a visit the visit leader (with the help of another competent person if necessary) should consider the risks associated with the visit/activity. A preliminary visit provides the ideal opportunity to identify hazards and risks associated with the journey, venue and planned activity. In addition, the visit leader should consider the individuals who will make up the group and any risks associated with them (e.g. related to their ability/previous experience, maturity, behaviour, special needs etc.).

The school/centre may have run similar visits/activities in the past. If so, there should be a record of the planning and evaluation of the visit and this can provide invaluable information for the visit leader.

To facilitate this process, it is good practice for schools/centres to develop risk assessments/operating procedures for the visits and activities that they regularly provide. In addition to helping with visit planning, these will create a valuable source of accumulated knowledge for the induction and on-going training of visit leaders. It is a good idea to save these into a shared file that is accessible to all staff in the school/centre.

The visit/activity pointers in [Annex 4](#) of this guidance are provided as a starting point for schools/centres when producing their own risk assessments/operating procedures.

Ensuring that visits/activities are risk assessed appropriately is the legal responsibility of the employer. To ensure that the risk assessment and safety measures are fully understood and implemented by those on the visit it is good practice for the visit leader (or other competent person on the visit) to complete the written risk assessment. But whoever completes the risk assessment, it is the employer who is ultimately legally responsible for ensuring that it is suitable and sufficient.

Risk assessment and independent providers

If you intend to use an independent provider for any part of the visit then you should discuss and agree with them what elements of the visit they will be responsible for and what areas you and

your staff will be responsible for. You must then risk assess the areas that you and your staff will be responsible for. For further advice relating to use of independent providers please refer to [Section O](#).

Dynamic risk management during the visit

Dynamic risk management involves the judgements and decisions made by leaders as situations arise during a visit e.g. cancelled public transport, young person or staff illness, closed venue or adverse weather conditions. The ability to re-assess and manage changing risks while the visit is taking place is a key element of the competence for leaders of educational visits. It should be the focus of induction and training for visit leaders within the school/centre (See also [Section D2](#)).

The EVC/Head must take the decision as to whether staff are competent or not to manage dynamic risks. For visits that require LA approval, the Outdoor Education Adviser will assess the technical competence of the visit leader to manage dynamic risk associated with the activity (see [Section P3](#)).

Significant action taken as a result of dynamic risk management may require changes to the school/centre risk assessments on return to base – to ensure that future visits are forewarned.

Contingency Planning (Plan B)

Visit leaders should think about a contingency plan (plan B) that might allow the educational aims of the visit to be achieved even if the original plan has to be abandoned for any reason. In considering plan B, the visit leader should check:

- that the leader is familiar with the venue for use with groups;
- that the leader is competent to lead the activity at this venue;
- that the group is appropriately equipped/experienced for the venue/activity.

Sometimes even Plan B might need to be abandoned. If this happens, visit leaders should apply the considerations above prior to selecting an appropriate course of action. If no appropriate alternative is available then the entire visit may need to be abandoned.

The school/centre emergency contact should be aware of the group's plans and possible options.

It is good practice to inform parents/carers of the range of activities possible for the visit.

Pressure on staff by young people to stick to the original plan despite poor conditions has led to serious incidents/fatalities in the past and must be resisted. If the group are aware of contingency plans, disappointment (and therefore pressure on staff) should be kept to a minimum.

Risk assessing a visit

The visit leader (or other competent person who will be present on the visit) identifies the **significant** hazards and risks associated with the visit (e.g. transport, venue, activity, group, weather etc.) and the safety measures needed to reduce these risks to a tolerable level. This is best done after a preliminary visit and through discussion/agreement with other staff/leaders, and ideally with the young people, going on the visit.

Does the school/centre have a risk assessment/operating procedures for this type of visit/activity?

YES

NO

Does this risk assessment/operating procedure include all of the hazards/safety measures you have identified for this actual trip (e.g. group dynamics, site variables etc)?

YES

NO

Record the significant hazards and safety measures on a risk assessment form (see [model form EV13](#)) and keep a copy for school/centre records

Record the additional hazards and safety measures *[that aren't included in the school/centre risk assessment/operating procedure]* on a risk assessment form (see [model form EV13](#)) and keep a copy for school/centre records

Ensure relevant safety measures are implemented for the visit and make sure teachers/volunteers/parents/other leaders/pupils are aware of action they need to take to help to manage safety.

Dynamic risk management during the visit

Keep an eye on variables such as individuals in the group/weather/venue and be ready to change to a contingency plan if necessary. Monitor the effectiveness of safety measures and the ability of your group to implement them. Take time to re-assess risks and safety measures before changing plans.

After the visit

Does the school/centre risk assessment/operating procedure need to be modified in the light of the visit or any incidents (your own or other people's – good or bad)?

YES

NO

Inform the EVC of recommended changes to the school/centre risk assessment/operating procedure. EVC updates school/centre risk assessment/operating procedure and informs LA Outdoor Education Adviser if changes are required to the activity pointers in Annex 4 of this guidance.

No further action

C10 **Financial planning**

The visit leader should ensure that parents/carers have written information about the costs of the visit, how much will come from school/centre funds, and how much each parent/carer will be charged or asked to contribute. Parents/carers should be given enough time to prepare financially for the visit. It may be useful to break the costs down into subheadings such as travel, hostel, meals etc.

The Head/EVC should ensure that banking arrangements are in place to separate the visit's receipts from other school/centre funds and from private accounts.

The Head/EVC/visit leader should reach a pre-agreement with parents/carers on whether any funds left surplus after the visit will be returned to parents/carers or retained for another visit.

C11 **Charging for visits - schools**

In schools other than independent schools the education provided wholly or mainly during school hours is free. This means that Heads may not impose a charge on parents for any visit that occurs during school hours. The Head teacher may, however, ask for a voluntary contribution.

Parents should be made aware that the contribution is not compulsory, and the children of parents who do not contribute may not be discriminated against. It is permissible to ask parents to contribute more than the minimum amount in order to subsidise those young people whose parents have not contributed. In the last resort, the visit may have to be cancelled if there are not enough voluntary contributions and the shortfall cannot be made up.

The Head teacher may, however, charge parents for board and lodging on residential visits as well as the full costs when a visit is deemed to be an 'optional extra'. An optional extra:

- falls wholly or mainly outside school hours;
- does not form part of the National Curriculum;
- is not part of a syllabus towards a Prescribed Public Examination; and
- is not in scope of the statutory requirements relating to religious education.

For example, a skiing holiday during the school holidays would be an optional extra.

The Head teacher should obtain the parents' agreement to meet the costs of an optional extra visit before the visit is planned in detail. Charging parents for an optional extra visit may not include an element of subsidy in respect of other young people whose families do not meet the full charge.

On residential visits which are not optional extras, or which take place during school hours, some parents may have board and lodging costs remitted. The LA's remission policy will provide details of eligibility for remission of fees.

C12 Selection and checking of residential accommodation

See also the activity pointer for residential visits in [Annex 4](#).

Residential accommodation plays an important part in the success or otherwise of the visit. Accommodation selected should provide the facilities required to support the educational and social aims of the visit. The ability of young people to concentrate can be seriously compromised by lack of sleep. At the very least, this can lead to problems with the educational outcomes for the visit and may have implications for safety. Finding the right place to stay and ensuring that young people are fully aware of the importance of sleeping is therefore essential.

Serious incidents have occurred in the past where hostel or hotel accommodation has not been secure against intrusion by outsiders or has been jointly used with incompatible groups. Visit leaders should be particularly alert to the dangers posed by balconies - these have led to a number of serious falls in the past – often by young people trying to climb onto another balcony.

Wherever possible, visit leaders should ensure that:

- the group's immediate accommodation will be exclusively for the group's use, or are accepting of co-usage;
- visit leader and other staff will have sleeping accommodation on the same floor adjacent to the young people's accommodation wherever practicable;
- there are male and female staff present for mixed-sex groups of young people. Where this is not possible parents should be advised of this and give their consent;
- there are separate male and female sleeping/bathroom facilities for young people and adults;
- there is appropriate and safe lighting, heating and ventilation;
- the whole group are aware of the lay-out of the accommodation, its fire precautions/exits, its regulations and routine, and that everyone can identify key personnel;
- appropriate and proportionate child protection arrangements are in place;
- where hotel/hostel reception is not staffed 24 hours a day, security arrangements will be in place to stop unauthorised visits;
- where possible, internal doors are lockable but staff must have reasonable access to the young person accommodation at all times for reasons such as fire etc.;
- there is adequate space for storing clothes, luggage, equipment etc, and for the safe keeping of valuables;

- there is provision for young people with special needs and those who may fall sick;
- any balconies are stable, windows secure and electrical connections safe;
- where possible young people are not be lodged in ground floor rooms;
- they check with accommodation manager that the fire alarm is audible throughout the accommodation and ensure a fire drill is carried out before the first night;
- there are appropriate recreational accommodation/facilities for the group;
- the hotel/hostel is able to meet any particular cultural or religious needs of the group;
- there is an appropriate number of staff to provide evening supervision and overnight cover.

C13

Planning a visit

This page charts the likely stages of planning a visit

Outline proposal to Head, EVC or governing body seeking approval in principle. Proposals might include:

- Purpose of the visit.
- Proposed date(s), duration, venue and activities.
- Group – size and age range, staffing.
- Resources required, estimate of costs.

[Proposals for longer visits may need to be made well before the start of the relevant academic year.]

Please note that an **overseas expedition** (to a third world country involving trekking or other adventure activities) run by an **independent provider** requires LA approval in principle at least 12 months before the trip and before any contracts are signed.



Planning

- Exploratory visit. Are venue/activities suitable for the group/visit aims?
- Will you be using an independent provider? Check their suitability prior to making a booking
- What could cause you to abandon your original plan? Contingency plans (Plan B) – what alternatives exist to meet the aims of the visit if you have to abandon the original plan?
- What are the transport options?
- Who will lead the group and who will help to supervise it (during activities and 'down-time')?
- Are staffing numbers and competence appropriate for the planned visit and group needs?
- Who will pay for the visit?
- Risk assessment – shared with all leaders and young people. Copy on file.
- Emergency procedures and contact arranged.



Full details of visit to Head/EVC.

- Details of dates, venue, programme/itinerary, risk assessment, emergency procedures, transport, insurance, costs, group membership, staffing.



Routine visits

- Inform parents of routine visits and obtain consent on termly or annual basis.
 - Obtain approval from Head/EVC for routine visits – termly or annual basis.
 - Brief young people/agree code of conduct.
- Continue to monitor risks at all times during the visit and be ready to change to a contingency plan if necessary



Residential and visits abroad

- Information to and from parents.
- Briefing meeting for parents/carers.
- Brief young people/agree code of conduct.
- Deposits/full payments by parents/carers.

Non-routine day visits

- Obtain final approval from Head/EVC.
 - Obtain LA approval for visits involving adventure activities or demanding environments
 - Obtain parent/carer consent. Briefing meeting?
 - Brief young people/agree code of conduct
- Continue to monitor risks at all times during the visit and be ready to change to a contingency plan if necessary



- Obtain final approval from Head/EVC.
- Notify the LA (at least 28 days before the visit).
- Obtain LA approval for visits involving adventure activities or demanding environments (at least 28 days before visit).
- Obtain parent/carer consent.



Continue to monitor risks at all times during the visit and be ready to change to a contingency plan if necessary



- Evaluate the visit

Section D

Staffing the visit

[Leader competence](#)
[Induction and training of visit leaders](#)
[Staff: young person ratios](#)
[Use of volunteers](#)
[Children and close relations of leaders/helpers](#)
[Protection of children](#)
[Staff briefing](#)

D1 **Leader competence**

Competent leadership is a key element in the quality and safety of any visit. Heads (supported by the EVC) are responsible for ensuring competent leadership for all educational visits. This is best achieved by:

1. selecting appropriate people (in terms of their personal qualities) to become leaders;
2. inducting them through a structured and documented 'apprenticeship' (see D2 below);
3. deploying the right people for the right visit;
4. monitoring them from time to time to identify further development needs;
5. providing further training or experience, as identified during monitoring, or by other means.

LA employees (including teachers and youth workers) who wish to lead in any of the environments or activities for which LA approval is required must be confirmed as technically competent to lead by the LA Outdoor Education Adviser (see [Section P3](#) for details).

D2 **Induction and training of visit leaders**

It is good practice for the Head/EVC to create a structured and documented induction/training system for visit leaders within the school/centre. This system should identify and provide access to relevant induction and training opportunities for less experienced staff to develop competence in visit planning and leadership.

This is best achieved by staff working alongside more experienced colleagues on a range of educational visits. A gradual process of increasing responsibility in visit planning and leadership for these staff, mentored by a more experienced colleague, is particularly effective. This creates a valuable professional development opportunity for all involved, increases confidence of staff and helps to develop a pool of competent visit leaders for the future. It is good practice for the outcome of this process i.e. final agreement that a new leader is sufficiently competent, to be recorded.

In addition, relevant training and further experience can be an effective means of developing confidence and competence. Relevant training might include first aid, mini-bus driving, lifesaving or other activity-specific leadership training.

Leader Training is a one-day course provided by the Outdoor Education Advisers' Panel that provides training in dynamic risk management, safety at water margins, way finding and other key

elements in visit safety. It is recommended to all those involved in visit leadership.

The LA Outdoor Education Adviser can advise on appropriate training and providers.

D3 Staff: young person ratios

It is important to have an adequate ratio of competent adult supervisors to young people for any visit. The factors to take into consideration include:

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

The visit leader or other competent staff must determine the actual ratio for any visit. Staff: young person ratios given in [Annex 2](#) are therefore intended only as a starting point for visit leaders when planning their visit. Subsequent modification may be appropriate.

When determining staffing levels, visit leaders should:

- recognise that large parties create special supervisory problems and should be sub-divided for activity purposes;
- be aware that small parties with minimum staffing are very vulnerable to staff illness or accident. This eventuality needs serious consideration at the early planning stage, especially for extended visits, visits abroad or any of the visits which require LA approval/notification;
- allow for the possible reduction in effectiveness of any member of staff who is accompanied on the visit by a close relation. This may be particularly relevant in an emergency situation.

Where leaders operate alone, the group should be trained and briefed on action to take in the event of leader incapacitation. An assistant leader, able to look after the group and raise the alarm, should be present if the group would be at significant risk were the leader incapacitated.

D4 Use of volunteers

Adults other than teachers/youth workers and ancillary staff based at the school/centre can make a valuable contribution to the success of the visit. The LA values and recognises this contribution, provided that:

- any visit is led by a teacher/youth worker or suitably competent LA employee approved by the Head/EVC (and LA if required);
- employees of the school/centre normally form not less than 50% of the minimum required staffing complement;
- volunteers are competent for their allotted tasks;
- each individual is approved by both the Head and visit leader and is entered on the voluntary helpers list kept by the school/centre;
- they have been carefully briefed on the scope of their responsibility.

An Enhanced CRB Disclosure should be obtained for individual volunteers if they regularly help with visits, are assisting with a residential visit, or are likely to be in sole charge of a young person under 18 on a one to one basis.

D5 Children & close relations of leaders/helpers

Leaders and helpers who bring their own children/close relations on a visit may have potential conflicts of responsibility, particularly if the child/children would not otherwise be one of the group taking part in the visit. This may have consequences for supervision levels, particularly in emergency situations.

Heads/EVCs must consider the benefits and risks prior to giving approval.

D6 Protection of children

Visit leaders must consider and apply as necessary their own LA's Child Protection Procedures and Guidance.

The following advice must be considered whenever adults other than employees of the school/centre or LA, are involved in a visit. This is particularly important in respect of residential visits.

Visit leaders must:

- check that they understand the school/centre procedures for vetting volunteers who wish to be leaders, drivers, hosts or otherwise involved in the visit;

- assess the suitability of the volunteer for the role in question, in consultation with the Head/EVC.

If, after appropriate checks, doubt remains about the individual's suitability that person should not be allowed to be involved in the visit.

Changes were made to the law in 1998 with the intention of preventing those who are barred from direct employment in education from gaining access to children and young people through voluntary or sub-contracted work with schools/centres. Some LAs may require Heads to obtain satisfactory CRB checks of volunteers and staff employed by contractors who may have regular contact with children or young people, either on or off site.

For residential visits all staff/volunteers must be CRB checked

Visit leaders should:

- advise staff and volunteers that, for the mutual protection of adults and young people, they should avoid being alone with a young person whenever possible. Supervision should be structured to reduce such possibilities;
- inform parents/carers as part of verbal briefing and written information of the general measures taken to minimise risk to young people and that the school/centre takes the issue of child protection very seriously and that best practice guidelines are being followed;
- check with the Head the procedure to be followed in the event of suspected or reported abuse;
- recognise the limitations of police and CRB checks and that child offenders escape detection;
- accept that constant vigilance and the maintenance of a protective ethos during the visit is essential.

D7 Staff briefing

The visit leader will normally wish to involve as many of the accompanying staff as possible in the planning stages of a visit. At least one formal briefing meeting for all staff is desirable prior to the visit. It may be appropriate for the Head/EVC to attend this briefing. At this meeting the visit leader should ensure that:

- all staff are aware of and support the visit's objectives;
- all staff are aware of significant hazards and safety measures to be followed;
- all staff understand and accept their responsibilities;
- procedures to be adopted in the unlikely event of an emergency are clearly understood.

Occasionally staff who are senior to the visit leader may be included in the party. In such circumstances the overall authority of the visit leader should be agreed prior to the visit.

Section E

Selection and preparation of young people

[Information to young people](#)

[Participation](#)

[Young people with special educational and medical needs](#)

[Code of conduct](#)

[Mobile phone protocol](#)

[Drug issues and educational visits](#)

Governing bodies/Heads/EVCs should ensure that young people in their care take part in a progressive series of visits during their time at the school/centre. Visits should gradually develop each young person's confidence, independence and responsibility.

For example, young people of primary school age might progress from use of the school/centre grounds to short visits close to the school/centre to day visits in local or neighboring areas culminating in a residential visit.

Young people of secondary age should be given experiences that build on foundations laid during the primary school years. For example, visits to locations that are further afield, longer residential experiences and visits and activities involving greater independence and responsibility. Schools/centres must ensure that young people going on these longer visits have sufficient previous experience and are at a stage where they will be able to benefit from the level of independence and responsibility that the visit entails.

Young people who are involved in a visit's planning and organisation, and who are well prepared, are more likely to make informed decisions about their own and other's safety. Providing information and guidance to young people is therefore an important part of preparing for an educational visit.

E1 Information to young people

The visit leader should decide how information is provided, but young people should understand:

- the aims and objectives of the visit/activity;
- the background information about the place to be visited;
- what could harm them and safety measures to keep themselves and others safe;

- what standard of behaviour is expected from young people (code of conduct);
- appropriate and inappropriate personal and social conduct;
- who is responsible for the group (including instances where the visit leader has delegated responsibility to another member of staff or an independent provider);
- the need to follow instructions of teachers, youth workers, leaders and instructors;
- what not to bring back either within the UK or from abroad such as drugs, knives etc;
- what to do if approached by anyone from outside the group;
- rendezvous procedures;
- what to do if separated from the group;
- emergency procedures;
- basic foreign words where appropriate;
- relevant foreign culture and customs.

E2 Participation

If the activity has been well chosen for the group, the young people should be capable of undertaking it, perhaps with some effort. Young people should be encouraged to undertake appropriate challenges during activities but not be coerced where they have a genuine fear or objection.

E3 Young people with special educational, medical or other needs

The Disability Discrimination Act (1995) places duties on local education authorities and schools/centres not to discriminate against disabled young people for reasons relating to their disabilities. Schools/centres must check that all reasonably practicable efforts have been made to include young people with disabilities in educational visits. However, this must be balanced against the safety of the individual and other group members and a reasonable compromise sought.

Schools/centres should already be familiar with the nature of a young person's special educational, medical or other needs. Any limitations or problems the young person may have should be taken into account at the planning stage. The following factors should be taken into consideration:

- is the young person capable of taking part in and benefiting from the activity?

- is the young person capable of coping with the required level of responsibility that the visit entails?
- are all staff involved in the visit aware of the young person's needs?
- can the activity be adapted to enable the young person to participate at a suitable level without diminishing the benefits to others to an unacceptable level?
- will additional/different resources be necessary?
- is the young person able to understand and follow instructions?
- will additional supervision be necessary?
- is transport/accommodation/venue appropriate for the young person?
- Are arrangements in place for taking any required medication? Can sufficient supplies be obtained?

All adults supervising a visit (including leaders or other supervisory staff provided by an independent provider) should be made aware of a young person's medical, behavioural or other special needs and any medical emergency procedures that are relevant to the proposed visit. This might be achieved by issuing all teachers/youth workers with details of each young person's needs and any other relevant information provided by parents.

Note: the primary risk of failing to supply adequate medical information ought to outweigh the secondary risk of, for example, failing to implement data protection requirements.

If appropriate, a volunteer teacher/youth worker should be trained in administering medication, if they have not already been so trained. It may be appropriate to ask the parent or a care assistant to accompany a particular young person.

Enquiries should be made at an early stage about access and facilities for securing wheelchairs on transport and at residential centres etc, if appropriate.

If ramps are required but are not going to be available in certain places, the organiser may wish to arrange to take portable ramps with them. The visit leader should assess whether manual handling skills will be needed and, if so, whether training for staff should be sought.

All teachers/youth workers supervising the visit should be given the opportunity to talk through any concerns they may have about their ability to support the child. Extra help should be requested if necessary, e.g. a care assistant.

If teacher/youth workers are concerned about whether they can provide for a young person's safety or the safety of other young people on a trip because of a medical condition, they should

seek general medical advice from the School Health Service or further information from the young person's parents/carers.

The visit leader should check that the insurance policy covers staff and young people with preexisting medical needs.

[Annex 9](#) gives a more detailed overview of the implications of the Disability Discrimination Act for organisers of educational visits.

E4 Code of conduct

It is good practice to discuss and agree a written code of conduct with young people and their parents/carers prior to the visit. This code of conduct should set out acceptable and unacceptable standards of behaviour and the action/sanctions that may be taken as a result of a breach of the code of conduct, including arrangements and costs for returning a young person home early as the result of bad behaviour. The importance of sound discipline should not be underestimated: lack of control and discipline has been a common cause of accidents in the past.

Where the behaviour of a young person has significant safety implications for themselves, or others in the group, then the young person should be withdrawn from the activity. On residential visits the visit leader should consider whether such young people should be sent home early.

Schools/centres should use an alternative means of fulfilling the curricular aims of the visit for any young person who is excluded from a visit for behavioural reasons.

E5 Mobile phone protocol

Mobile phones can provide a useful link between young people and their parents but can also create difficulties if misused. Clear instructions should be given to young people if the decision is taken for them to take phones; this could be included in the code of conduct.

E6 Drug issues and educational visits

As part of the planning process for an educational visit, the visit leader should carefully consider issues connected with medicine use and substance misuse. It is good practice to agree rules and sanctions relating to drug issues where appropriate and to include this in the code of conduct.

Issues to consider include young people and adult:

- use of medicines;
- use of tobacco;
- consumption of alcohol;
- use of drugs illegal in the UK and abroad.

[Annex 8](#) gives detailed consideration of these issues.

Communicating with parents/carers

[Information to parents/carers](#)
[Parent/carer consent](#)
[Medical consent](#)
[Contact with parents/carers during the visit](#)
[Young person contact with parents/carers](#)

An effective, two-way communication process between schools/centres and parents/guardians is important for all visits. Effective communication will ensure that parents/carers are made aware of the purpose and nature of the visit and will ensure that parents/carers inform the school/centre about any particular needs and issues of their child relevant to the visit.

F1 **Information to parents/carers**

Information to parents might include:

- the aims and benefits of the visit;
- dates of the visit or series of visits;
- times of departure and return – and whether parents/carers will be required to meet their children on return;
- the location where the young people will be collected and returned;
- mode(s) of travel including the name of any travel company;
- the size of the group and the level of supervision;
- details of accommodation;
- details of provision for special educational or medical needs;
- names of leader, of other staff and of other accompanying adults;
- the planned programme of activities;
- agreed arrangements for non-emergency contact during the visit;
- emergency contact arrangements to and by parents/carers;
- the code of conduct for the visit detailing expected standards of behaviour and sanctions;

- arrangements for the early return of a young person for any reason during the visit;
- details of insurance taken out for the group as a whole in respect of luggage, accident, cancellation, medical cover, any exceptions in the policy and whether parents need to arrange additional cover;
- clothing and equipment to be taken;
- what young people should not take on the visit or bring back;
- advice on pocket money and allocation/care on journey;
- the information to be given by parents and what they will be asked to consent to;
- details on the cost of the visit. See Sections [C10 and C11](#).
- the risks associated with the visit (but tempered with information about the school's/centre's good safety record, and the overall benefits to the participants).

Information should (where relevant):

- be sent as far in advance of the visit as practicable;
- be followed up by a parent's/carer's meeting to clarify detail if needed. This is particularly important for residential visits, or when the young people are to travel abroad or engage in adventure activities or visits to demanding environments. Where a briefing meeting is required, alternative arrangements might need to be made for parents/carers who cannot attend or who have difficulty with communication.

F2 Parent/carer consent

Parent/carer consent must be obtained for educational visits. This may be done on a blanket basis for regular visits or on a one-off basis for non-regular visits. The contents of a consent form for a parent/carer to sign will vary according to the type of visit. See Section Q, [model forms EV4](#) and [EV8](#) for examples of consent forms.

If parents/carers withhold their consent absolutely the young person must not be taken on the visit but the curricular aims of the visit should be delivered to the young person in some other way wherever possible. If the parents/carers give a conditional consent the Head will need to consider whether the young person may be taken on the visit or not.

F3 Medical consent

For visits that require parent/carer consent, parents/carers should be asked to agree to the young person receiving emergency treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities. If parents/carers do not agree to this, Heads may decide to

withdraw the child from the visit - given the additional responsibility this would entail for the visit leader.

Doctors can be expected to carry out necessary emergency treatment without parental consent but it is possible that a surgeon in another country might be reluctant to operate on a young person unless assured that the visit leader had parental authorisation to agree to such treatment. It is sensible to include a translation of the medical consent, as signed by the parent, in the relevant foreign language.

F4 Contact with parents/carers during the visit

If it is going to be possible for parents/carers to contact their child via the school/centre contact or the visit leader in the event of a home emergency or a late arrival home, these details should be made known to parents/carers.

Parents/carers should therefore:

- know the destination details;
- be aware of the emergency contact arrangements.

F5 Young person contact with parents/carers

Visit leaders should arrange for parents/carers to be told by the school/centre of the group's safe arrival. One way of doing this is by a 'telephone tree' whereby one parent/carer contacts an agreed group of parents/carers who then contact a further group. But young people may wish to speak to their parents/carers individually. Such arrangements should be agreed with parents/carers and young people before the visit takes place. Parents/carers concerned after a phone call should contact the school/centre contact.

Parents/carers should be made aware of and consent to the mobile phone protocol if applicable.

Organisation and supervision during the visit

[Supervision](#)
[Head counts](#)
[‘Buddy’ system](#)
[Rearranging groups](#)
[Downtime arrangements](#)
[Assembly, departure and the journey](#)
[On arrival](#)
[Fire](#)
[Communication](#)
[Behaviour problems, illness or injury](#)
[Homesickness](#)
[The return journey](#)

During the visit, the leader(s) must:

- monitor the group and conditions and be prepared to change plans to ensure the success of the visit and/or the safety and well-being of the group;
- be operating within his/her personal experience, abilities and qualifications;
- be physically and mentally fit to lead the activity and the particular group;
- know the group, the particular environment and the resources. If any of these elements is unfamiliar then the leader will need to be particularly vigilant and may need to modify the activity;
- work at a level appropriate to the needs of the group, taking into account abilities of weaker members;
- understand the effect of likely weather change on the activity;
- accept that there are some weather conditions and activities which are too dangerous to be educationally justified for young people;
- work within County and National guidelines for the activity where these exist.

G1 Supervision

The visit leader has a delegated responsibility for the group at all times during the visit. If delegating or transferring supervisory roles to other adults in the group (including leaders of an independent provider), it is good practice for the visit leader to:

- ensure that each adult knows which young people they are responsible for;
- ensure that each young person knows which adult is responsible for them;
- ensure that all adults understand that they are responsible to the visit leader for the supervision of the young people assigned to them;
- ensure that all adults and young people are aware of the expected standards of behaviour and agreed sanctions.

It is good practice for each leader to:

- have a reasonable prior knowledge of the young people including any special educational needs, medical or other needs or disabilities;
- carry a list/register of all group members;
- directly supervise the young people (except during remote supervision) - particularly important when they are mingling with the public and may not be easily identified;
- regularly check that the entire group is present;
- have a clear plan of the activity to be undertaken and its educational objectives;
- have the means to contact the visit leader/other leaders if needing help;
- have prior knowledge of the venue either directly or via a briefing by the visit leader following their exploratory visit;
- anticipate potential risk and act promptly to manage risk where necessary;
- continuously monitor the appropriateness of the activity, the physical and mental condition and abilities of the group members and the suitability of the prevailing conditions;
- be competent to exercise appropriate control of the group within the limits of their abilities and either act on this or advise the instructor or guide in charge, and to ensure that young people abide by the agreed standards of behaviour;
- clearly understand the emergency procedures and be able to carry them out;
- have appropriate access to First Aid.

Each young person should:

- know who their leader is at any given time and how to contact him or her;
- have been given clear, understandable and appropriate instructions;
- alert the leader if someone is missing or in difficulties;
- have a meeting place to return to, or an instruction to remain where they are, if separated;
- understand and accept the expected standards of behaviour;
- carry a note of the address of their accommodation.

G2 **Head counts**

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

- carry a list/register of all young people and adults involved in the visit at all times;
- ensure that young people are readily identifiable, especially if the visit is to a densely populated area. Brightly coloured caps, T-shirts or a school uniform can help identify group members more easily;
- avoid identification that could put young people at risk e.g. name badges (though some schools/centres find it useful to provide young people with badges displaying the name of the school/centre or hotel and an emergency contact number, or for visits abroad a note in the language of the country being visited);
- ensure that all young people are aware of rendezvous points;
- ensure that all young people know what to do if they become separated from the group.

G3 **'Buddy' system**

Visit leaders may wish to create a buddy system to involve young people in the head count process. Each young person is paired with a buddy and regularly checks that this buddy is present and is OK. A variant of this is the 'circle buddy' system – the young people form a circle at the start of the visit so that each young person has a left side buddy and a right side buddy. He or she will check on these

when asked. Thus two young people are less likely to vanish together and not be missed (as might happen with paired buddies).

G4 **Rearranging Groups**

It can be easy to lose people when rearranging groups. In particular:

- when a large group is split into smaller groups for specific activities;
- when groups transfer from one activity to another and change leader;
- during periods between activities;
- when small groups re-form into a large group.

It is therefore important that the leader:

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

G5 **Downtime arrangements**

On educational visits 'downtime' (i.e. times when the group are not directly engaged in the main programmed activities) can create opportunities for social development and relaxation. However, visit leaders should note that a high proportion of accidents and problems have occurred during 'downtime'.

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

It is good practice to:

- ensure that all staff and young people understand the standards of behaviour that apply at all times, not just during activities;
- ensure the group are briefed on, and understand, boundaries and time limits for downtime;
- ensure that handover between activities is properly supervised, with a named leader responsible for the group if there is down-time between activities;
- ensure that all leaders understand that their supervisory role continues in the evening – however hard a day it has been, that it is not a time to relax in the bar or in front of the TV. A rota system may be necessary with some staff not participating in the day-time activities;
- use down-time in the evening or at the beginning of the day to brief the group on the planned activities for the day to come, e.g. the planned learning outcomes, specific health and safety issues, meal and break times etc.;
- use down time after activities for individual reflection on personal learning outcomes, and group discussion about the highs and lows of the day;
- apply the advice contained in [11 Remote Supervision](#), adapted as necessary, if it is felt reasonable to allow young people some time without close supervision;
- occupy the group with suitable activities in the evening, e.g. craft activities, environmental activities, quizzes, team challenges, led-walks.

G6 Assembly, departure and the journey

Meet in good time to allow for packing of vehicle and farewell to family/friends.

If travelling by coach, check its general condition and cleanliness and the provision and visual condition of seat belts. Identify the location of first aid, fire extinguishers and emergency exits before allowing young people on board. Any minor deficiencies should be noted (if possible with driver acknowledgement); serious defects may require the provision of an alternative vehicle.

If on a ship or at an airport, group members may easily become detached from the main group. All members should know what to do in the event of becoming 'lost'. A distinctive item of clothing worn by all individuals may help in quickly identifying group members. All baggage should be tagged and possibly marked with a distinctive tape. Arrange a definite, easily recognisable base where staff may always be found. Young people may carry a card, with relevant details, to help the re-establishment of group contact. Such cards should be carried discretely to avoid viewing by strangers.

Be prepared for travel sickness and beware the risk of losing valuable documents, e.g. passports.

Arrange appropriate refreshment stops and ensure adequate supervision.

Carry out regular head-counts.

G7 **On arrival**

Depending on the type of visit, arrival may require considerable patience, flexibility and organisation. Even after short journeys, young people can be very excitable.

For residential visits it is a good idea to establish a temporary base for people, luggage and equipment whilst liaison with centre/accommodation staff is made. As soon as possible after arrival parents/carers should be informed, via the school/centre emergency contact and parental network, of the group's safe arrival.

Introduce centre/accommodation staff and ensure a briefing is given relating to (where relevant):

- what they can expect from their visit;
- security and fire routines including a practice evacuation from bedrooms;
- toilets and other immediately required facilities;
- room/tent allocation;
- luggage arrangements;
- facilities (including recreation facilities);
- routines, rules, duties, responsibilities;
- expectations regarding behaviour;
- mealtimes and punctuality;
- staff contact arrangements.

Where problems are perceived with the arrangements, an objective discussion and co-operative approach with the management will normally be effective. If you are unhappy about fire precautions, safety or security arrangements make your point firmly with the management and insist on improvements. In the event of serious concerns remaining, the visit leader may need to consider abandoning the visit or reverting to plan B.

Several incidents have occurred on the continent in recent years whereby intruders have gained access to group accommodation (see [Section N: Visits Abroad](#)). Leaders should check:

- there is a teacher/youth worker/leader present on that floor whenever the young people are there;

- in the absence of 24 hour staffing of reception, external doors must be made secure against intrusion and windows closed as necessary to prevent intrusion;
- procedures for summoning help should the need arise.

G8 **Fire**

On arrival the accommodation should be checked thoroughly to ascertain:

- the availability of warning alarm procedures and location/use of equipment;
- evacuation procedures and emergency exits.

A fire drill should be carried out at the earliest opportunity; this must be before bedtime on the day of arrival, with a full evacuation from bedrooms to a fire assembly point.

Rules about cooking, smoking, matches etc. should be established. Rules relating to the locking of rooms overnight must be considered. A judgement may be necessary, e.g. between unwanted access and the ability to get out in the event of a disorientating fire. It may generally be wiser to insist that rooms remain unlocked to enable access to all rooms in an emergency.

G9 **Communication**

Effective communication between staff and young people during the visit is crucial to the proper management of the educational and social experience. It also has a major bearing on the safety and well-being of young people. Arrangements appropriate to the nature of the visit should be made to ensure efficient communication eg. regular meeting times, notice board, briefings.

Establish a daily routine with regard to briefings that should include:

- programme and any changes to this;
- potential dangers;
- safety rules;
- expected conduct;
- rendezvous points;
- action in event of being separated or in an emergency;
- clothing, food and weather.

It is good practice for staff (and possibly young people) to hold a meeting chaired by the visit leader each night to take stock and assess the circumstances for the next day, and to spend time early the next morning explaining arrangements to the young people.

Ensure opportunity exists during the stay for young people to contact home, as agreed previously with parents/carers.

G10 Behaviour problems, illness or injury

Poor behaviour may be reduced by ensuring that all young people are signed up to agreed standards of behaviour before the visit.

Educational visits can be a good opportunity for school/centre staff to get to know young people away from the confines of the educational establishment. The different hazards that young people may be exposed to away from the school/centre will require them to observe standards of behaviour that are at least as high as, or higher than, in the school/centre

Illness or injury may require the application of first aid or medical assistance. A doctor or hospital will require access to any medical information you have along with parental consent to operate on their child if required. In cases of hospitalisation young people should be accompanied by an adult they know and arrangements made for frequent visits. If possible there should be communication between the local doctor/hospital and the young person's own doctor when a young person returns home. It is important to collect all available data e.g. X-rays, medicines, case notes.

Accidents involving injury or damage to an individual, young person or adult require that the party leader (or other adult at the scene) make a detailed, written record of the circumstances of the incident. These records should be retained on file in support of the report of the incident on return to the school/centre. In the heat of the moment it can be difficult to remember to do this, but these 'contemporaneous' notes are of great value afterwards.

In the unlikely event of serious accident the Emergency Procedures detailed in [Section M](#) should be applied.

If an adult has to give prolonged attention to one group member, the visit leader should reassess the supervisory roles of the other adults to ensure that all members of the group know who is responsible for them. Activities may need to be amended until the other adult returns all of his or her attention to the group.

Visit and group leaders should trust their own knowledge of the young people and use their own professional judgement. This may include challenging an activity leader where the visit leader's knowledge of the group is superior, or intervening to assist with group management or to prompt a change of plan. There is no simple answer to the question 'who is ultimately in charge?' Sometimes only a court can decide so it is better for leaders to discuss options early in the visit.

G11 Homesickness

Homesickness requires that the leader follows a balanced approach that should be explained to parents/carers prior to the visit taking place. It is recommended that all parents/carers and young people are informed that telephone contact with home may not be possible during a visit. Parents/carers should be reassured, however, that they will be contacted over any serious incident or serious and prolonged homesickness. Parental contact with the child may help to reduce homesickness, but, if not, the young person may have to be returned home.

G12 **The return journey**

Brief the group about the return journey. If the exact time of departure is uncertain, plan activities that purposefully occupy the group.

Where customs controls are involved, check on duty-free concessions beforehand and inform the group about illegal imports. Failure to conform to customs duty regulations can be costly, time-consuming and embarrassing.

If a significant delay occurs, measures must be taken to inform parents/carers of the delay, to assure them and to give some indication of the expected, amended return time. Your Emergency Contact will prove invaluable in this eventuality.

Section H

After the visit

[Review of the visit](#)

[Reviewing with young people](#)

[Accident and incident records](#)

[What records does the school/centre need to keep?](#)

H1 **Review of the visit**

The importance of an appropriate review cannot be over emphasised. One of its main purposes is to identify strengths and weaknesses of arrangements so as to improve the organisation of future visits. Time to carry out the review should be built in during the early planning stages, otherwise pressures on return to the school/centre might over-ride this vital aspect.

The scale, nature and outcome of the visit will determine the scope and structure of the review. If possible, the review should be carried out with all staff who were on the visit. Ideally the views of the young people should form part of the review.

A review of the successes and problems of the visit, as a minimum, should be made for every visit. Risk assessments should be updated if required in the light of any incidents.

It is good practice to inform the Outdoor Education Adviser of the outcome of your review to ensure that benefits and potential pitfalls of venues/activities/providers are shared across the LA. This will help other schools/centres to take advantage of good opportunities and avoid the bad ones.

H2 **Reviewing with young people**

Educational visits offer young people considerable opportunity to develop and exhibit attitudes and abilities not readily seen in the school/centre. This is particularly true of residential experiences. Reviewing can be a great way to draw out and crystallise key learning points from the visit. Visit

leaders should consider the potentially significant contribution to personal and social development and organise/review accordingly. For further ideas visit www.reviewing.co.uk

H3 **Accident and incident records**

Visit leaders should follow LA and school/centre procedures in the unlikely event of an accident/incident recording. These records should be kept on file in the school/centre unless the LEA files them centrally – EVCs should check with their LEA.

EVCs have a key role in ensuring that the learning points from accidents and incidents are communicated across the school/centre and to the Outdoor Education Adviser. This will help to ensure that they and others are more likely to avoid similar problems in the future

H4 **What records does the school/centre need to keep?**

Litigation claims relating to educational visits are rare but can potentially be made up until the young person reaches age 21 (or, for adults over the age of 18 years, for a period of 3 years after the visit). Schools/centres should therefore keep sufficient records to help them to demonstrate that visits have been organised and led competently. To minimise paperwork it is recommended that schools/centres retain the following basic information for any individual visit (or series of repeated visits):

- The risk assessment for the visit
- List of young people and staff on the visit
- Programme of activities that took place on the visit
- Evaluation of the visit

Plus, if applicable

- LA approval or notification for those visits that require this
- Completed Independent Provider Questionnaire (or equivalent) if relevant

In addition, schools/centres should retain a copy of their:

- Educational visits policy – dated so that the version current at the time of any trip can be traced.
- Records of staff competence and training (perhaps as part of the appraisal/performance management records)

If (and only if) there has been an accident/incident on the visit, schools/centres should also file:

- Accident/incident form and any related report / witness statements / follow-up actions
- A copy of the information sent to parents/guardians
- A copy of the completed parent/guardian consent form(s) for the injured young person(people)

Advice on specific activities and types of visit

[Remote supervision](#)

[Safety at water margins – activities and visits that take place on, in or near water](#)

[Swimming and paddling in natural waters](#)

[Swimming pools](#)

[Coastal visits](#)

[Farm visits](#)

[Fieldwork](#)

[The Adventure Activities Licensing Services](#)

[School/centre-led adventure activities](#)

[Adventure activity equipment](#)

[Paint-ball and war games](#)

[Airborne activities](#)

This section expands on the general visit planning and organisation guidelines in Sections B to H of this guidance.

I1 Remote supervision

These principles apply particularly to remotely supervised groups while undertaking adventure activity such as the qualifying expedition section of the Duke of Edinburgh's Award but are also relevant to fieldwork, 'downtime' and other times when groups are not directly supervised by a leader.

Activity undertaken without direct leader supervision can be a powerful learning experience for participants but must not be undertaken lightly. Such activities:

- should be run by a suitably qualified and experienced leader, familiar with the area and with a good knowledge of the group;
- should form a natural progression to the programme of study. Young people should be at a stage to cope with and benefit from such experience;
- should be at a level of difficulty below that which would be appropriate for the same young person operating in a led situation;
- require appropriate young person maturity, levels of training and experience;
- require a system for frequent staff checks on the welfare and behaviour of participants;
- should be included in information to parents/carers.

Remotely supervised activities should never be used as a means to overcome staffing shortage.

Visit leaders should note that the skills, knowledge and qualifications of the leader overseeing a

remotely supervised group should normally be greater than those required by leaders overseeing a directly supervised group in the same activities/environment.

Leaders should recognise that they remain responsible even when the group is operating independently and should set arrangements accordingly.

Management of remotely supervised groups

The leader should be sufficiently qualified and experienced to determine that the training, skills and abilities of the individual members of the group are appropriate to the activity undertaken.

- Basic ground rules regarding behaviour, mutual support, out-of-bounds areas etc must be established and agreed with the group.
- When on expedition, or in demanding environments where there is a significant risk of benightment away from shelter, remotely supervised groups must carry (and have had instruction in the use of), emergency bivouac equipment (or tents), including spare food and clothing appropriate to the conditions.
- Routes chosen must reflect the experience and fitness of the group and the loads being carried.
- If a trained first aider/emergency services cannot reach the group quickly following an incident, it is recommended that members of the party are first aid trained and carry a first aid kit.
- Clear, concise, written instructions for emergency action and emergency telephone contacts should be available to all members of the group.
- Emergency telephone numbers should be permanently manned. Leaders should note that mobile phones cannot be relied upon to give adequate coverage in many remote areas unless a reconnaissance has shown otherwise.

Recommended reading: *Remote Supervision Guidance Notes* available from Mountain Leader Training Wales, Siabod Cottage, Capel Curig, Conwy LL24 0ET. Tel: 01690 720361

e-mail: info@mltw.org web: www.mltw.org

I2 Safety at water margins - activities and visits that take place on, in or near water.

Water margins present many opportunities for learning but can also present significant hazards.

As part of the planning process for any visit taking place on, in or near water, the visit leader must carefully consider the suitability of the venue and the level of competence required to supervise the young people safely and effectively.

When selecting a suitable venue, visit leaders should consider:

- the likelihood of someone falling in and;
- the seriousness of falling in. Factors influencing seriousness include:
 - ☐ depth and temperature of the water and air (note: sudden and unexpected immersion in cold water has a rapid and dramatic effect on the body's systems and will often impair people's ability to reach safety);
 - ☐ current. Is the current strong enough to knock someone off his or her feet? (fast flowing water doesn't need to be deep to do this – ankle-deep may be enough). If so, where would the current take them?;
 - ☐ presence of underwater or bank hazards (e.g. tree roots, shopping trolleys, rocks, sharp objects);
 - ☐ water quality (e.g. bacteria from chemicals, sewage, dead animals or other causes). Can groups wash their hands in clean water prior to eating if required?
- how easy would it be to rescue someone who has fallen in or who is in difficulty?
 - ☐ Could they get themselves out easily? Could they be reached safely e.g. with a towel, a stick, a piece of clothing, a length of floating rope or any public safety equipment that is available? Could someone wade in to get them without putting him or herself in danger?
- how does the venue change according to current and past weather conditions?
 - ☐ Is the venue subject to rapid changes in water levels? When and why do these happen? How would these effect your chosen location?
 - ☐ Are there clearly recognisable 'cut-off' points which can be identified (e.g. river level or tide height indicator) to help the visit leader decide whether or not the visit should go ahead or be stopped? Can the visit leader clearly recognise if conditions are suddenly changing during the visit? Can they get the group to safety if conditions require it?
 - ☐ Has the venue changed in character recently? (Remember: just because it was safe on the last visit doesn't mean it will be safe for this visit).
- tidal venues
 - ☐ Check tidal conditions (e.g. with the coastguard or other appropriate local expertise), so you know when high tide is, how high it will reach, and whether there are any strong local currents. Could your work area be cut-off or submerged by a sudden wave or quick rise in the tide level? The tide may advance more quickly than your group can retreat. Also beware steeply shelving shingle beaches, where one step could take someone out of their depth and into a rip current.

If the visit leader is not happy with the planned venue/activity due to any of the above points, they should opt for a different and safer location or activity (plan B).

I3 Swimming and paddling in natural waters

See also the activity pointer for this activity in [Annex 4](#).

Most young people thoroughly enjoy the opportunity to swim or paddle in natural waters – particularly in warm weather. But swimming and paddling in natural waters can also present real risks and requires careful judgement and vigilance.

Involving young people in well-organised and supervised swimming/paddling in natural waters can provide an extremely important opportunity to develop their risk awareness with regard to choice of swimming area and safe conduct while swimming. The impact of this education should not be underestimated – it could save their lives in the future. Failure to manage risks associated with water results in the death of approximately 90 young people every year in the UK - the majority of these deaths occur when young people are with their friends or family. But drowning has also been the main cause of death on educational visits over the past few years.

Visit leaders who wish to swim or paddle with their groups should select an appropriate venue (see I2 above) and ensure that there are appropriate safety measures in place to manage the situation. Visit leaders should make the most of opportunities to involve young people in decision-making regarding choice of venue, boundaries, group procedure and supervision such as buddy systems.

It is good practice that, wherever possible, visit leaders seek out recognised bathing areas that have official surveillance i.e. qualified lifeguard cover. But, even then, visit leaders should be aware that young people might mingle with members of the public and be lost to view. Young people should always be in sight and within reasonable reach of their supervisors/lifeguards.

Before swimming or paddling in natural waters with a group, visit leaders should:

- select a suitable venue (see [I2 above](#));
- check the weather;
- look out for and respond to warning signs and flags;

- ensure that appropriate measures and staff competence exist to retrieve someone from the water if they get into difficulties. See [Annex 4](#) for more on leader competence;
- ensure that there is an adequate ratio of staff to young people and that the number of young people allowed in the water at any one time is appropriate for the venue/risks/ability of supervisors to keep track of, and rescue if necessary, any members of their group;
- recognise that even paddling can be dangerous, especially with young children;
- be aware that even strong swimmers can get into difficulties in natural waters;
- be aware that it is possible to drown in one's own depth;
- check carefully the swimming ability of young people;
- establish a clearly defined and recognisable area for the activity and brief young people on this;
- ensure the group clearly understands distress and recall signals;
- ensure that young people have not eaten for at least half an hour before the activity;
- be aware that it can be difficult to tell when someone is in difficulty. They may not wave or shout if they are using all of their energy to keep afloat;
- ensure that all supervising adults understand what action to take in an emergency, e.g. know the location and means of summoning the emergency services;
- ensure that there is sufficient privacy for young people and adults to change without putting themselves in a vulnerable position.

While swimming is taking place visit leaders and supervisors should:

- be clear about their roles;
- take up positions which allow them to keep a careful eye on the group, or their own sub-group, at all times;

- carry out regular head counts;
- avoid swimming themselves while supervising unless it is to help a young person in distress;
- act immediately if a young person appears to be in difficulty;
- ensure that young people leave the water immediately if they get too cold;
- be aware that jumping into cold water can be disorientating and can cause even strong swimmers to panic. It is better to wade in rather than jump in.

I4 **Swimming pools**

See also the activity pointer for this activity in [Annex 4](#).

If considering the use of a swimming pool not used before or monitoring the hazards of a regularly used pool it is advisable to observe and check the following:

- is there constant pool supervision by one or more qualified lifeguard(s)? If not, the visit leader, or a designated teacher/youth worker/leader, must be competent to carry out a rescue of any group member in difficulty. See activity pointer in [Annex 4](#) for more on leader competence;
- do staff: young person ratios allow effective supervision at all times that young people are in the water? Staff will need to consider whether any young people have special needs which require someone in the water able to give immediate assistance;
- is the water temperature appropriate?
- is the water clear?
- are there signs clearly indicating the depth – is there a shallow end and is the water there shallow enough?
- does the pool cater for young people with disabilities?
- does the deep end allow for safe diving?
- is there a poolside telephone?

- are there a resuscitator and other pieces of first aid and rescue equipment, and is there someone trained to use them?
- is there a changing room for each sex?
- does the pool cater for any particular religious or cultural factors?
- are the changing and showering facilities safe and hygienic?
- can clothes and valuables be stored securely?
- have the young people been instructed on how to behave in and around the water?

15 Coastal visits

Local sources of information such as the coastguard, harbour master, lifeguard or tourist information office can provide information and advice on areas of particular interest as well as the nature and location of hazards.

Visit leaders should be aware that many of the incidents affecting young people have occurred by or in the sea. The visit leader should bear the following points in mind when assessing the benefits and risks of a coastal activity:

- tides, rip tides and sandbanks are potential hazards;
- timings and exit routes should be checked;
- ensure group members are aware of warning signs and flags;
- establish a base on the beach to which members of the group may return if separated;
- look out for hazards such as glass, barbed wire and sewage outflows etc;
- some of a group's time on a beach may be recreational. Visit leaders should consider which areas of the terrain are out of bounds;
- if intending the group to swim or paddle in the sea, the visit leader should follow the guidance given in [I3 Swimming and paddling in natural waters](#);

- cliff tops can be highly dangerous for groups even during daylight. The group should keep to a safe distance from the cliff edge wherever possible – thus maintaining a 'buffer zone' between the young people and the hazard. Be aware that cliff erosion can mean that cliff paths can be undercut and prone to collapse. Localised downdraughts at cliff tops can be strong enough to blow people over the edge. This highlights the importance of an exploratory visit and of staying alert during the visit in case things have changed since then.

16 **Farm visits**

Farms can provide an exciting opportunity for young people to learn about rural life and food production but can also be places of relatively high risk. Careful planning and good on-site management is vital. Staff should ensure that they and the young people in their care engaged in these activities take the relevant precautions listed below and inform parents/carers accordingly.

Organisers should ensure, by an exploratory visit, that the farm is well-managed, is able to meet the educational aims of the visit and applies adequate safety and animal welfare standards. It should have dedicated public areas, washing and toilet facilities. The farm should, ideally, be one of the FUW/NFU sponsored "Open Farms" which are specifically developed for visitors.

Zoonosis infections (eg Weil's disease) are a risk to visitors to farm sites. Zoonosis infections are transmitted by contact, directly or indirectly, with the faeces or urine of some animals or by the drinking of contaminated water. Organisers should ensure that all supervisors and children are informed of the precautions to be taken.

Such infections are relatively rare but can be serious. Most are treatable with antibiotics. Symptoms of infection may include flu-like attacks, headache (often persistent), vomiting, muscle pain, diarrhoea and abdominal pain. Parents/carers should be briefed to inform the school/centre and arrange for their child to see a doctor if they develop any of the above symptoms in the days or weeks following an educational visit to a farm.

Visit leaders should check the provision at the farm to ensure that:

- eating areas are separate from those where there is any contact with animals;
- there are adequate clean and well-maintained washing facilities;
- there is clear information for visitors on the risks and precautions to take;
- there is adequate trained adult supervision wherever young people might come into contact with animals;

- all young people wash their hands thoroughly as soon as possible after touching animals and before any eating and drinking;
- shoes are cleaned and then hands are washed on leaving the farm.

Visit leaders should never let young people:

- place their faces against animals;
- put their hands in their mouths after touching or feeding the animals;
- eat or drink while going round the farm;
- sample any animal foodstuffs;
- drink from taps other than in designated public areas;
- touch animal droppings – if they do then wash and dry hands;
- play in the vicinity of, or ride on, tractors or other machinery unless part of an 'approved' ride;
- play in the farm area (other than designated play areas), or in other areas that are out of bounds such as grain storage tanks, slurry pits etc.

I7 **Fieldwork**

See also the activity pointer for this activity in [Annex 4](#).

Leader competence

Leaders operating in any of the environments for which LA approval is required (as detailed in [Table Pii](#)) must first obtain LA leader approval as detailed in [Section P3](#).

Before the visit

Visit leaders should:

- obtain permission, in advance, from land-owners and occupiers, to work on the site and be clear about rights of way and any restrictions on access and activities. The Countryside Council for

Wales can offer further advice regarding access issues;

- choose sites with care, avoiding sites of Special Scientific Interest and Nature Reserves (unless these specially cater for education groups) and seek resilient areas;
- ensure that everyone is familiar with appropriate codes of conduct, such as the Countryside Code;
- consider child protection issues carefully, particularly in areas where there is open public access;
- ensure they follow the guidelines relating to [remote supervision](#) (Section I1) if young people will be operating away from direct staff supervision.

During the visit

Visit leaders should ensure that:

- all party members have appropriate clothing and footwear for the activity and conditions;
- leaders maintain a degree of supervision, appropriate to the nature of the party, including frequent checks on number and safety;
- they carry first-aid and emergency equipment appropriate to the environment and activity and that they know how to use this equipment. See [Section C8](#) for more on first aid;
- disruption of the environment, e.g. by collection of plants, rocks etc., is kept to an absolute minimum or prohibited and that members of the party be encouraged, instead, to record by sketches, photographs etc.;
- the behaviour of the party does nothing to damage the attitude to field studies held by site owners or the general public, and to this end make sure that all members of the party recognise the need for good behaviour and courtesy in all their contacts with the public.

I8 Adventure Activities Licensing Services (AALS)

The AALS website www.aals.org.uk is an important source of information and includes:

- details of the specific activities and terrain that are licensable;
- a list of providers who hold a current license to deliver licensable adventure activities along with details of the activities they are licensed to deliver;
- the Adventure Activities Licensing Regulations;
- other useful information relating to adventure activities.

Who needs a licence?

Anyone who provides licensable adventure activities to young people under the age of 18 in return for payment (which does not have to be aimed at profit making). This can include both commercial and voluntary bodies.

Schools/centres **do not** need a licence for provision of activities to young people who are currently pupils at the school/centre but would be expected to apply the same standards of leadership, management and care as are required for licensable organisations.

Schools/centres **do** need a licence for provision of licensable activities to young people who are not currently pupils at the school/centre. This includes the Duke of Edinburgh Award if ex-pupils of a school take part or young people from another school/centre or other under-18 year olds are involved. Special consideration may be given to young persons who have left school the previous term, and who wish to continue participating in the school's Duke of Edinburgh programme without the school being required to hold a licence.

The Armed Forces can be providers but have Crown immunity from the Regulations when on duty.

What does a licence cover?

A licence will only cover management and delivery of licensable activities by the provider. This means that the provider will **not** have been inspected for any non-licensable activities that they provide or for other aspects of provision such as catering, transport and accommodation. Visit leaders should therefore follow the guidance in [Section O Use of independent providers](#) if intending to use an independent provider, even if they hold a license.

I9 **School/centre-led adventure activities: Leader competence**

LA employees (including teachers and youth workers) who wish to lead adventure activities must first gain LA leader approval as detailed in [Section P3](#).

I10 **Adventure activity equipment**

Schools/centres who own technical activity equipment and Personal Protective Equipment (PPE) for use by staff/young people must ensure that this is maintained according to manufacturers' recommendations of care and lifespan and that a record is kept of regular maintenance checks. The Outdoor Education Adviser can give further advice.

I11 **Paint-ball and war games**

Visit leaders should seriously consider the moral, ethical and environmental implications of these activities before offering them to young people.

If going ahead with this activity, visit leaders should establish that:

- there is an effective means to stop all activity/call a ceasefire in the event of an incident;
- there are recognised and clearly marked/visible 'safe zones' to which participants could retreat in the event of difficulties;
- participants can signal that they are in distress (e.g. asthma attack).

I12 **Airborne activities**

In general, LA approval would not be given to visit leaders to take responsibility for instruction or direct leadership of any form of airborne activity. Exceptions may be made where staff have specific national governing body awards and current experience. Where commercial providers are to be used, leaders must ensure that the organisation is a bona fide operator and is licenced by the appropriate national governing body or government department.

Section J

DUKE OF EDINBURGH AWARD EXPEDITIONS

Leader competence Paddle ventures Incident reports Choice of expedition area River crossing Swimming The role of expedition staff Supervision during expeditions Altitude Selection, notification and approval of routes Recommended reading
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Local Authorities (LAs), via the DofE Strategic Manager, authorise the use of the DofE by groups and organisations within the LA area for young people between the ages of 14 and 25.

This Section applies to expeditions. Further advice is available to leaders in the Duke of Edinburgh's

Award Handbook and the Expedition Guide. For other off-site activities as part of the DofE, leaders should refer to other relevant sections of this guidance, particularly Sections A-H. See also the activity pointer for DofE county Award expeditions in [Annex 4](#).

Organisers of Duke of Edinburgh's Award activities and expeditions should check whether or not they, or independent providers they employ, are required to hold an AALS license as detailed in [Section I8](#).

J1 Supervisor competence

School/centre employees who wish to supervise DofE expeditions or lead adventure activities must first gain LA leader approval as detailed in [Section P3](#).

Table A on the next page details National Governing Body (NGB) Award qualifications for expeditions on foot at different levels of terrain/activity. Where the relevant NGB award is not held, approval may be given by a technical adviser to those with proven personal and leadership experience at a comparable standard to the NGB. For further details refer to [Section P3](#).

For expeditions using other modes of travel (e.g. canoe, bike or horse) please refer to [Annex 3](#) of this guidance for appropriate leadership awards.

Table A - National Governing Body (NGB) Award qualifications for expeditions on foot

Terrain/activity	Appropriate qualification
Walking expeditions – lowland country in the UK	Level 2 Award in Basic Expedition Leadership (Administered by Sports Leader UK)
Walking expeditions – non-mountainous, hilly or moorland terrain in the UK	Walking Group Leader Award (WGL) (Administered by Mountain Leader Training Wales www.mltw.org)
Walking expeditions - mountainous terrain in the UK in non-winter conditions	Summer Mountain Leader Award (ML summer) (Administered by Mountain Leader Training Wales www.mltw.org)

J2 Paddle ventures

Leaders of paddle ventures should follow the guidance given in the Duke of Edinburgh's Award publication *Paddle Ventures* available from www.dofe.org

J3 Incident reports

Any incident during an expedition, which resulted in or could have caused injury, must be reported to the LA by contacting the DofE Strategic Manager as soon as possible after the incident.

J4 **Planning expeditions**

Choice of environment for DofE expeditions must take into account the experience and competence of each member of the group and the 20 DofE expedition conditions which are central to the successful completion of ventures. The 20 conditions can be found at www.dofe.org.

Participants with individual needs may apply to their Operating Authority (OA) for a variation from one or more of the 20 conditions. The procedure for this can be found on the website www.dofe.org.

As a general rule expeditions should travel **through** rather than **over** mountains. This means that groups should plan routes which predominantly use valleys/passes rather than going to the tops of major peaks. The emphasis should be on adventure and challenge through remoteness rather than technical difficulty/risk.

When advising group members, leaders should take into account the effect of navigational error during the expedition. Where such an error may lead a group onto very steep ground or sharp ridges, the route may need modification or closer supervision.

J5 **River crossing**

Fording streams or rivers is a potentially high-risk activity. Even ankle-deep fast flowing water can be enough to knock someone off their feet and, when combined with the effects of wearing a large rucksack, can lead to serious consequences. Groups should be briefed on the hazards during training and routes should be selected to avoid river crossing, except in the most benign circumstances.

J6 **Swimming**

Expedition leaders should follow the guidance given in [section I2 and I3](#) of Educational Visits.

J7 **The role of expedition staff**

a) DofE Co-ordinator

The DofE co-ordinator may not necessarily be present on the expedition but they have overall responsibility for the group and usually act as the liaison with the relevant authorities, i.e. school/centre and Local Authority. They will also be co-ordinating the other sections of the Award in their school/centre. It is the DofE co-ordinator's responsibility to ensure that the supervision of the group is carried out by a competent (see J1) supervisor who is suitably supported.

b) Supervisor

The supervisor has overall responsibility on the ground and must have proven competence for the terrain in which the expedition takes place as set out in section J1. This may be the same person as

the DofE co-ordinator. It is their responsibility to ensure the health and safety of the entire group and also the staff involved on the expedition. This is a responsible position that involves all decision making on behalf of the groups and liaising with the home contact if an emergency arises. In major emergencies the supervisor may have to devolve responsibility to the emergency services. Supervisors will need the competency and experience to understand the nature of an incident, procedure required to resolve the problem and the consequence of actions taken. It may be that such decisions may affect only one part of the group and that they retain responsibility for the remainder.

Supervisors will not be with the group at all times but will determine the nature and extent of close and remote supervision based on the experience of the group and nature of the activity/terrain.

c) Assessor

The assessor ensures that all conditions and requirements for the DofE are met. At each level of the programme different criteria apply as to whom is suitable to assess groups. These concern the person's past links with the group and are detailed in the DofE Expedition Guide.

The assessor is not responsible for the safety of the group but will advise participants and supervisors of issues relating to potential hazards occurring on the chosen route. These might include terrain, weather conditions and access issues knowledge of which could support the safety of the group.

The supervisor and assessor for a group cannot be the same person. A supervisor, who is also an accredited assessor, may assess a different group at the same time as supervising their own group providing this is practical and does not detract from their responsibility as a supervisor nor reduce the quality of the assessment.

The assessor should make no decisions that effect the expedition. However, a supervisor would be wise to accept advice from an assessor, especially when local knowledge is involved.

From October 2009 all assessors of Duke of Edinburgh's Award Expeditions must be accredited by the DofE, further guidance on this can be found at www.dofe.org

d) Volunteer

The volunteer supports the supervisor in ensuring that the expedition runs smoothly and safely. The role of volunteer is recommended as a stage in the apprenticeship served by supervisors.

e) Emergency/home contact

In situations where the visit leader is out on expedition an alternative home contact must be appointed who can be contacted 24 hours a day. They must have access to copies of group members consent forms and fully understand the emergency procedures to follow in the event of an incident.

J8 Supervision during expeditions

An integral part of the Duke of Edinburgh's Award Programme is the ability of the young people to complete an expedition on their own. To reach the stage of acting independently, they must have acquired the necessary techniques, with sufficient experience, confidence, physical ability and judgement. The training given must be sound and thorough with careful judgement being made before the leader can withdraw. Even then, withdrawal from direct supervision should be a gradual and progressive process. A staged progression may develop as follows:

- Accompanying groups (direct, close supervision);
- Shadowing groups;
- Checking at various times and venues (remote supervision);
- Occasional contact via pre-arranged locations and methods.

The supervisor continues to be responsible for the group even when direct supervision has been withdrawn.

All expeditions should be unaccompanied and self reliant, if a team does not possess the necessary physical, medical and expedition skills required for an area, then they should not be in that area.

As part of effective remote supervision, teams may be more closely supervised for parts of the route where specific dangerous areas are unavoidable or where the consequences of navigation error are severe.

Routes requiring supervision for safety reasons should not become the norm since they would then fall outside the expectations of the Award.

If required closer supervision should:

- be undertaken by an appropriately competent person (see J1);
- be of an absolute minimum and provided only to ensure the safety of group members;
- be discreetly done by 'shadowing', normally in visual contact but close enough to intervene if safety requires.

J9 Altitude

Altitude in the UK is not, of itself, a major factor (subject always to consideration of prevailing and forecast weather). DofE advice is that routes "which involve more than 600 metres of ascent in a day should be viewed with suspicion".

J10 Selection, notification and approval of routes

Route selection should always be by the group members against criteria based on the above expectations. Leaders must ensure that routes chosen reflect the above criteria.

All unaccompanied practice and qualifying ventures taking place in Wild Country areas must be notified to the appropriate Expedition Assessment Service (EAS), details of which can be found at www.dofe.org.

It is important that routes should first be notified to and approved by the LA Operating Authority **before** submission to the EAS. This will minimise paperwork should amendment be required. LA approval procedures must be followed for all expeditions. These procedures are explained in [Section P5](#) of this guidance. Recognition of the time necessary to do this before submitting forms to the Award Expedition Panel should be borne in mind.

The functions and responsibilities of the LA as an Operating Authority and of the EAS's are quite distinct. The LA has responsibility for the safety of participants and the effective operation of the DofE programme. The EAS's maintain no direct responsibility for safety but have such functions as, for example, checking that routes meet the minimum requirements of the Award level, advising on local access issues, provision of assessment.

Insurance

[General](#)[Insurance and parents/carers](#)[Insurance cover for visits](#)[Cancellations](#)[Transport](#)

K1 **General**

The Head/EVC must ensure, well before the group departs, that adequate insurance arrangements have been made for the visit. Insurance may be provided by, for example, the LA, a travel firm, a bank, the organisation to be visited or an insurance company.

Heads or visit leaders should clarify with their LA what insurance provision already exists and what additional cover may need to be arranged. Those schools/centres that are not covered by the LA insurance provision will need to investigate and make satisfactory arrangements of their own.

K2 **Insurance and parents/carers**

The visit leader should write to parents/carers to inform them of the scope of any insurance cover the school/centre is to arrange and to advise them about any additional insurance they may wish to arrange. It is advisable to make copies of the insurance schedule available to parents/carers as early as possible in the booking process.

LAs may find that taking out Personal Accident insurance in respect of some/all educational visits simplifies their obligations.

K3 **Insurance cover for visits**

Insurance policies are legal documents. They will impose conditions, limit the cover, and exclude certain people or activities. Insurance companies/travel firms can advise on particular types of insurance. However, the following are examples of cover that may be appropriate to many types of educational visit:

- Employer's liability;
- public liability;

- personal accident cover for teachers/youth workers, other adults, and young people;
- costs of medical treatment;
- specialised risk activities (often excluded from standard policies) and the costs of evacuation for medical reasons when abroad;
- damage to or loss of hired equipment (check the wording of the hire agreement);
- programmed and non-programmed activities;
- transport and accommodation expenses in case of emergency;
- compensation against cancellation or delay;
- compensation for loss of baggage and personal effects including money;
- legal assistance in the recovery of claims; and failure or bankruptcy of the centre or travel company.

Additional arrangements may be necessary to obtain insurance cover for activities abroad and activities of a potentially hazardous nature. The visit leader should scrutinise carefully the list of exclusions in the policy. If there is any doubt about the cover the insurer should be asked for clarification.

The visit leader should ascertain the details of the insurance held by any independent provider.

Additional cover may be necessary for participants with medical conditions. The visit leader should check this with the insurance company before departure.

K4 Cancellations

If a cancellation occurs then the visit leader should seek a replacement. If one is not found then the insurer need not be informed since numbers will remain unchanged. Failing a replacement the visit leader must inform the insurer in writing of the change. Delay in notification may incur cancellation charges.

K5 Transport

When hiring coaches etc the visit leader should check that the company used has appropriate insurance. Most LAs have a list of LA approved companies.

Use of school/centre/private vehicles: the visit leader should check that the insurance policy for the school/centre minibuses is appropriate to the journey. Taking the school/centre minibuses abroad may require extra insurance.

The visit leader should check that the teacher/youth worker driving the school/centre minibuses abroad is appropriately insured and that their driving licence is valid for the countries to be visited or passed through en route.

Teachers/youth workers, other adults or young people using their own cars to carry young people on educational visits should ensure that their vehicle is properly licenced and that the insurance covers its use on school/centre business.

Some schools/centres and LAs take out their own policies to cover any claim that may be made against them as a result of transport provided in a private car. But this does not exempt the driver from taking out appropriate insurance.

Section L

Planning transport

General Legislation Supervision on transport Hiring coaches and buses Licences and permits Private cars Transport in the school/centre minibuses School/centre minibuses driver Minibus supervision and drivers' hours Maintenance and checks of the school/centre minibuses

L1 General

The visit leader must give careful thought to planning transport and must ensure they follow their own LA transport policy. At the very least, problems with transport can detract from the quality of a visit and have the potential to create critical safety issues. Road traffic accidents are statistically one of the main causes of serious injuries on educational visits.

L2 **Legislation**

The employer must satisfy themselves that all travel arrangements, including the hire of private coaches or buses, are suitable for the nature of the visit.

The driver is responsible for the vehicle during the visit.

Visit leaders must ensure that **minibus drivers meet licence/competence** requirements set by the LA.

Seat belts: All minibuses and coaches which carry groups of three or more children aged between 3 and 15 years inclusive must be fitted with a seat belt for each child. The seats must face forward and seat restraints must comply with legal requirements. For further information visit the Department for Transport website <http://www.dft.gov.uk>

Child seats: Children **under 3 years** MUST use the child restraint appropriate for their weight in any vehicle (except in the rear of a taxi if the right child restraint is not available).

Children under 135 cms in height and under 12 years of age must use the appropriate child restraint. Four **exceptions** allow these children to travel in the rear and use an adult belt:

- in a minibus, bus or coach if the right child restraint is not available. There is no requirement for the driver to supply a child seat in these vehicles.
- in a taxi if the right child restraint is not available;
- for an occasional journey over a short distance if the right child restraint is not available;
- where two occupied child seats in the rear prevent the fitment of a third child seat.

For more detailed guidance on the law with regard to child seats visit <http://www.thinkroadsafety.gov.uk/campaigns/childcarseats/childcarseats.htm>

L3 **Supervision on transport**

The level of supervision necessary should be considered as part of the planning for the journey. The visit leader is responsible to the school/centre/LA for the party at all times including maintaining good discipline.

All group members should be made aware of the position of the emergency door and first aid and anti-fire equipment on transport. The visit leader should also be aware of alternative routes or means of travel in the event of delay or cancellation.

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

- level of supervision that will be necessary on double decker buses/coaches - one supervisor on each deck should be appropriate in normal circumstances;
- safety on buses, trains, ferries and boats – the visit leader should make clear to young people how much or little freedom they have to 'roam'. Misbehaviour is a main cause of accidents to children on such means of transport. Appropriate supervision and discipline should be maintained at all times. Young people should also be made aware of what to do in an emergency and where emergency procedures are displayed;
- booking transport - the visit leader should arrange for seats to be reserved well in advance to ensure that the party can travel together wherever possible;
- safety of young people whilst waiting at pick-up and drop-off points and when getting on or off transport, particularly when using UK vehicles abroad. Young people should be made aware of safety rules and expected standards of behaviour;
- safety while on stops or rests during the journey - visit leaders should plan with the driver sufficient stops at suitable areas to ensure the safety of all group members including the driver. Drivers of buses and coaches must comply with legislation covering maximum periods of driving and minimum rest periods;
- safety of the group in the event of an accident or breakdown - the group should remain under the direct supervision of the visit leader or other teacher/youth worker wherever possible. The visit leader or driver should contact the police to provide safety support if the vehicle is in danger of being hit while broken down (e.g. if it is on the hard shoulder of a motorway or dual carriageway or is blocking or partially blocking a road). The visit leader should assess whether it is safer to keep the group on board the vehicle or to disembark and wait elsewhere;
- head counts, by the visit leader or another delegated teacher/youth worker or supervisor, should always be carried out when the group is getting off or onto transport;
- responsibility for checking that seat belts are fastened;

- consider whether a visible and easily recognisable article of clothing should be worn by the group to allow easy identification;
- young people should be made aware that they are not allowed access to the driving area at any time.

L4 **Hiring coaches and buses**

The visit leader should ensure that coaches and buses are hired from a reputable company according to LA policy. Professional operators of buses and coaches are legally required to be licenced. Schools/centres using operators to transport young people should enquire, preferably in writing, whether the operators have the appropriate public service vehicle (PSV) operators' licence. When booking transport, the visit leader should enquire, preferably in writing, whether seat belts are available for young people. Whilst seat belts must be fitted on coaches that carry groups of children, they are not legally required on buses. Buses where seat belts are not fitted are not normally appropriate for visits involving long journeys.

If any of the group uses a wheelchair, the visit leader should enquire, preferably in writing, whether transport used has appropriate access and securing facilities. It may be appropriate to use portable ramps.

Visit leaders should enquire, preferably in writing, whether operators have adequate procedures in place to deal with emergencies such as vehicle breakdown.

L5 **Licences and Permits**

All school/centre minibuses must have a Section 19 Permit displayed on the windscreen. Schools/centres can apply to their local council (for LA schools) or the local Traffic Commissioner (for non-profit making schools - usually registered charities) for a Section 19 permit. Section 19 Permits cannot be used outside the UK and separate rules exist for all those wishing to take minibuses abroad. LA transport section or the Department for Transport can provide further advice.

Minibus driver licence requirements

A) Drivers who gained their car driving licences before January 1st 1997

School/centre staff who hold a licence issued before 1/1/97 may drive a minibus **without** a D1 Passenger Carrying Vehicle (PCV) licence. It is good practice for drivers to be trained in a non-PCV course to a standard of driving competence expected by the Local Authority (e.g. MIDAS or RoSPA schemes).

B) Drivers who gained their car driving licences after January 1st 1997

A D1 PCV licence does not need to be held if **all** of the following conditions are met:

- The driver must be aged 21 years or over;
- The driver must have held a full driving licence for at least two years;
- The driver is trained in a non-PCV course to a standard of driving competence expected by the Local Authority (e.g. MIDAS or RoSPA schemes);
- No trailer is to be attached;
- No driving outside the UK takes place;
- The maximum weight of the vehicle must not exceed 3.5 tonnes;
- The driver must be driving in a voluntary capacity (i.e. they receive no payment for driving and driving does not form part of their job description);
- The minibus is used for education or social purposes by a non-commercial body.

If one or more of the above conditions is not met the driver must hold a full D1 PCV licence (plus E if they tow a trailer).

Please note: many minibuses on the market today weigh more than 3.5 tonnes and it is possible that the majority if not all will be above this weight in the future. In the long term it may therefore be necessary for all drivers to hold full D1 PCV licences. This test is costly but schools/centres would be well advised to consider investing in D1 PCV training over the coming years.

L6 Private cars – parents/carers and employees

Many educational visits are only made possible thanks to the willingness of parents/carers to drive their own, and often other peoples', children to venues.

It is the legal responsibility of the driver to ensure their passengers' safety, that the vehicle is roadworthy, and that they have appropriate licence and insurance cover for carrying the young people. It is reasonable for schools/centres to remind parents or employees of their legal responsibilities in this respect prior to allowing them to drive other peoples' children. In addition, Heads/EVCs should ensure that employees who carry young people in their own car have an insurance policy that includes business use in addition to social, domestic and pleasure use.

For further advice on the use of volunteers see [section D4](#) of this guidance.

L7 Transport in the school/centre minibus

Many schools/centres use their own minibuses for short, frequent journeys and sometimes for longer trips. Minibuses must comply with the various regulations about construction, fittings and maintenance. A forward facing seat with seat belt must be provided for each child. Some important regulations are the *Minibus (Conditions of Fitness, Equipment and Use) Regulations 1977* and the *Road Vehicle (Construction and Use) Regulations 1996*.

L8 **School/centre minibus driver**

Although the chair of governors or Head is ultimately responsible for the school/centre minibus, the driver is responsible for the vehicle during the visit. The minibus driver must be qualified to drive a minibus and have a valid driving licence - see [Licences and permits](#) above. The Head should consider a rest period before driving for teachers/youth workers driving school/centre minibuses – particularly for longer journeys. Minibus drivers must always adhere to transport Regulations. The Royal Society for the Prevention of Accidents have issued *Minibus Safety: a Code of Practice 1996*.

The minibus driver must:

- observe LA and/or governing body guidance, where appropriate;
- not drive when taking medication or undergoing treatment that might affect their ability or judgment;
- know what to do in an emergency;
- know how to use fire fighting and first-aid equipment;
- avoid driving for long periods and ensure that rests are taken when needed;
- clarify and comply with transport regulations and the requirements of the vehicle's insurance cover;
- take into consideration the effects of teaching and the working day;
- have regular medical checks eg eyesight.

L9 **Minibus supervision and driver's hours**

Recent minibus incidents nationally have highlighted the risks posed by driver fatigue or distraction. It is for Heads to make decisions regarding arrangements for specific journeys. In determining the staffing ratio for any journey, schools/centres should carefully consider the factors that might influence the safety of the driver and passengers e.g.:

- The length of the journey and time of day when it takes place;
- The route and the familiarity of the driver with this route;
- The nature of the group (e.g. age/maturity/special needs/behavioural issues) and the level of behaviour management or support they are likely to require during the journey;
- The overall workload of the driver during the day (other responsibilities and duties undertaken or planned by the driver(s));

Based on an assessment of these factors, schools/centres should decide whether:

- a single teacher/youth worker driving is sufficient (e.g. for short journey with small groups of children who are unlikely to present any supervision issues);

Or

- additional staff are required to supervise young people and/or share driving duties during the journey, and if so, how many.

L10 Maintenance and checks of the school/centre minibus

The chair of governors or Head will usually be responsible for the school/centre minibus.

However, a Head may delegate to a willing member of staff responsibility for carrying out regular checks and ensuring that the minibus is maintained. The Head/person responsible for maintaining the minibus should:

- check the vehicle's condition on a regular basis (weekly for minibuses with high useage);
- ensure proper servicing by a reputable garage;
- maintain the record-of-use book with the service history, insurance and other relevant documents;

- ensure that any teachers/youth workers driving the minibus are competent and have undertaken suitable training to do so;
- always be informed before other teachers/youth workers use the school/centre minibus;
- ensure that drivers of the school/centre minibus are aware that the vehicle should always be logged in and out.

For **organising your own transport for visits abroad** see [section N3](#).

Emergency procedures

[General](#)[Emergency procedures framework](#)[Who will take charge in an emergency?](#)[Emergency procedures framework for those on the visit](#)[Emergency procedures framework for emergency contact](#)[Media contact](#)[Trial and review of emergency procedures](#)[After a serious incident](#)[Reporting accidents and incidents](#)[Investigation of serious incidents](#)

M1 General

Serious accidents and incidents during educational visits are extremely rare. Statistically, young people on educational visits are less likely to have an accident than when in school or in their own homes. But occasionally accidents can and do happen, even on well-led and organised visits, and emergency procedures are therefore an essential part of planning for any visit. Careful emergency planning can mitigate the trauma of being caught up in a serious incident. On such occasions leaders may need the support, advice and management skills of the Head, Governing Body and the LA.

As employees, teachers/youth workers in charge of young people during a visit have a duty to keep the young people in their care safe and healthy. They also have a common law duty to act as a reasonably prudent parent would. Teachers/youth workers should not hesitate to act in an emergency and to take lifesaving action in an extreme situation.

This section should assist in the preparation of emergency procedures for visits over and above normal contingency planning and should be read in conjunction with local LA emergency planning guidance.

M2 Emergency procedures framework

All those involved in the visit, including leaders, young people and parents/carers, should be informed about relevant sections of the emergency procedures in place for the visit (as a minimum what they are expected to do in an emergency).

One or more base emergency contacts should be identified. This will often be the Head, EVC or other senior member of staff. They must have the authority to make significant decisions and should be able to respond immediately at the school/centre base to the demands of the emergency. Most Local Authorities insist that emergency contacts are **not** parents/carers of young people on the visit.

Emergency contacts must provide 24 hour per day access by telephone. Their function is to act as a first point of contact with the group and to alert the Head and/or Chair of Governors and the LA when

appropriate. Heads and visit leaders should bear in mind that the contact lines may become busy in the event of an incident and that alternative numbers to ring would be useful.

Emergency contacts must have:

- office and home telephone numbers of a designated LA member of staff and those of the full LA emergency planning team. This is particularly important during holiday periods;
- a full list of names, addresses and telephone numbers of parents/carers of all young people and the next of kin of all adults on the visit. An identical list needs to be taken on the visit by the visit leader. Where parents/carers are away from home during the visit, or where there is no home telephone, alternative emergency contact arrangements must be made for such young people;
- Contact details for the British Embassy or Consulate for all trips abroad.

See Section Q, [model form EV11](#) for a suggested information form for the emergency contact.

It is good practice for the visit leader to agree an emergency action plan/procedure that sets out clear roles for the visit leader, school/centre emergency contact, Head e.g. managing media interest, supporting parents/carers of an injured young person, transport arrangements etc.

All adults who will be supervising young people during the visit should be briefed on relevant sections of the emergency procedures and should know the location of the nearest accident and emergency hospital, and the emergency services telephone numbers of the country they are visiting.

Medical information pertinent to emergency hospital treatment should be obtained using a Parent/Carer Consent Form (Section Q, [model form EV4](#)). One copy of this form for each young person in the party should be carried by the visit leader and another by the supervising teacher/youth worker or by the young person, if of an appropriate age.

Where travel by minibus is involved it is important to have the Emergency Contact names and telephone number/s clearly displayed in the vehicle.

A written summary of these Emergency Procedures should be carried by the visit leader.

The Head should check that independent providers/contractors have adequate emergency support procedures, and that these will link to school/centre and LA emergency procedures.

M3 **Who will take charge in an emergency?**

The visit leader would usually take charge in an emergency and would need to ensure that emergency procedures are in place and that back up cover is arranged. The visit leader should liaise with the representative of the independent provider if one is being used.

Specialist instructor or guide. Where the group are in the expert care of a specialist instructor or guide this person will normally be responsible for returning the group to a safe environment where the visit leader would be able to resume charge.

The emergency contact. The emergency contact's main responsibility is to link the group with the school/centre, the parents/carers and the LA (where appropriate), and to provide assistance as necessary.

M4 Emergency procedures framework for those on the visit

If an emergency occurs on an educational visit the main factors to consider include:

Control and supervision of the group:

- Establish the nature and extent of the emergency as quickly as possible;
- Account for ALL group members (head count) and, if possible, make sure they are safe and looked after;
- Safeguard the uninjured members of the group and ensure they are adequately supervised at all times and kept together;
- Establish the names of any casualties and get medical attention to them as soon as possible;
- Ensure all group members who need to know are aware of the incident and that all group members are following the emergency procedures (including staff);
- Ensure that the injured are accompanied to hospital wherever possible by an adult known to them, ideally a teacher/youth worker.
- Notify the police if necessary.

Information and communication

- Alert your school/centre emergency contact with precise details as soon as practical. Details should include: nature, date and time of incident; location of incident; names of casualties and details of their injuries; names of others involved so that parents/carers can be reassured; action taken so far; action yet to be taken (and by whom);
- Do not release names of involved or injured participants other than to official sources such as police, medical services.
- Ensure relevant telephones are staffed and log all calls.
- Restrict access to telephones until your Emergency Contact at base has been alerted, with precise details.
- If an emergency occurs abroad, notify the nearest British Embassy or Consulate. Identifying contact numbers for these should be part of the initial preparation.
- It is common for media reporting to be muddled and inappropriate following an incident. To avoid this, leaders and group members must avoid any direct dealings with the media. Media

enquiries should be referred to a designated media contact in the home area. Media response to a major incident is often immediate; depending on location leaders should expect and be prepared for media attention, possibly before the emergency services arrive;

- No-one in the group should discuss legal liability with other parties, nor sign anything relating to accident liability without clear advice from their LA (or equivalent employer).

Administration

As soon as possible:

- record all **facts** relating to the incident: time, date, those involved, what happened, witness details;
- preserve any vital evidence;
- maintain a record of subsequent events;
- keep receipts for any expenses incurred – insurers will require these;
- notify the tour operator or provider, where used;
- follow LA accident reporting procedures;
- notify the insurers.

M5 Emergency procedures framework for emergency contact

The main factors for the emergency contact to consider include:

- checking that the visit leader is able to manage the emergency or whether they need additional assistance e.g. from emergency services or from the home base;
- contacting parents/carers. The emergency contact should act as a link between the group and parents/carers. Parents/carers should be kept as well informed as possible at all stages of the emergency;
- liaison with the LA and/or governing body. The emergency contact should act as a link between the group and the LA and/or chair of governors and arrange for the group to receive assistance, if necessary;
- in the event of a fatality, contact should be made with the police;
- liaison with media contact. If a serious incident occurs, the emergency contact should liaise with the designated media contact as soon as possible;
- once the initial facts are clear and a press release agreed, the County Council/Press Office (or equivalent representative of the employer) will act as a base for media reception and as a channel for communication.

- the reporting of the incident using appropriate forms, if necessary. Some incidents are reportable under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 (RIDDOR).

M6 Media contact

LAs usually have a designated person to deal with media enquiries. The media contact should liaise with the emergency contact, the visit leader and, where appropriate, the emergency services. In the event of an emergency all media enquiries should be referred to the media contact. The name of any casualty should **not** be given to the media.

Non-Local Authority schools will generally not have this facility and so the school will need to have an equivalent procedure in place for such an eventuality.

M7 Trial and review of emergency procedures

Procedures should be trialled periodically to check that they are effective. They should also be reviewed regularly with the help of people from all agencies involved in any incident.

M8 After a serious incident

Immediately following a serious incident it is highly likely that group members and staff will be in a state of shock. It is therefore important to ensure their well-being and to provide them with security and protection from media attention.

All involved may need help in coping with possible shock and trauma, which may last for many weeks. Support and counselling may be necessary; in this event the LA/County Council support services can be of significant help. Professional advice may need to be sought on how to help individuals and the school/centre as a whole to cope with the effects of a tragedy.

M9 Reporting accidents and incidents

Schools/centres should follow local school/centre and LA procedures for reporting accidents and incidents.

The LA/Outdoor Education Adviser will monitor incidents and accidents in order to identify what consequent action may be necessary to limit recurrence, including further training for visit leaders/amendment of procedures.

M10 Investigation of serious incidents

A serious incident would include the fatality of a young person or adult but might also include serious injuries (e.g. those that in the UK are reportable under the Reporting of Injuries, Diseases or Dangerous Occurrence Regulations (RIDDOR) and comparable incident abroad) and incidents where no serious injury occurred but where the risk of injury was high.

When a serious incident has taken place on an educational visit in the UK or abroad, the police will generally investigate until they are satisfied that there has been no crime. In the UK this may also involve the Health and Safety Executive. Schools and Local Authorities should be aware that this can be a very lengthy process, often lasting months, and can be a very distressing period during which little if any information about the incident is released. This makes it very difficult for the Local Authority, or indeed other Local Authorities, to know how they can best prevent a similar recurrence.

On the other hand the LA will usually undertake its own investigation, but should be careful not to compromise the police/HSE investigation.

The investigation will seek to:

- determine the causes of the incident;
- determine whether there are lessons to be learned;
- provide information to bereaved parents/carers;
- exchange information with statutory investigation bodies as required e.g. police, coroner, Health & Safety Executive;
- manage media enquiries;
- provide early information to the Schools Management Division who will consider, with HSE and OEAPWales, the need for national dissemination of lessons learned.

The investigation should begin as soon as possible, while key witnesses have good recall of the facts. If an independent provider is involved in the visit, the LA should agree roles with them to avoid duplication of effort. Care should be taken not to disrupt any parallel investigations by the police, HSE, coroner etc.

Before publishing any report, the LA should check with the police, HSE, coroner etc. to ensure that publication will not jeopardise their investigations or any action that they may decide to take. When the investigation is complete, it is good practice to share lessons learned with all schools/centres in the LA area, with other LAs and with the Schools Management Division.

Local legal advice (and sometimes insurer's advice) will often suggest the merits of restricting information where it may be used for legal action. This should not mean keeping bereaved parents/carers uninformed even where the LA or school/centre may fear legal action. Indeed parents in this tragic situation often report their immense frustration and anger at seemingly being ignored. All efforts should be made to prevent this.

It is good practice to identify an official who will act as the key point of contact for bereaved parents/carers. This official should be sensitive to the family's needs and should preferably have some counselling competence. He or she should inform the family of the progress of the investigation, answering their questions as helpfully as possible, and providing them with the facts.

Bereaved parents/carers will need to know all the facts. In the long term, they will not be able to complete the grieving process if their questions remain unanswered. They will also need to know that any lessons learned will be applied. Denial of information is likely to compound and perpetuate their

grief, and to increase the likelihood that they will resort to legal action.

Section N

Visits abroad

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N1 General

Travelling abroad can be hugely rewarding for young people and adults alike. This section builds on general guidance for visits in [Sections C - H](#).

See also the activity pointer for this activity in [Annex 4](#).

Schools/centres who wish to organise an **overseas expedition** (to a third world country involving trekking or other adventure activities) through an independent provider should follow the guidance set out in [Annex 10](#).

N2 LA Notification

Most LAs require notification for visits abroad (see [Section P](#) for notification procedure).

N3 Organising your own visit

A Head or visit leader may decide to organise a package abroad without the help of an outside body. Package organisers have responsibilities under Directive 90/314/EEC. This is implemented in the UK by the Package Travel, Package Holidays and Package Tours Regulations 1992 (The Package Travel Regulations). These regulations apply to packages sold or offered for sale in the UK. They define a package as a combination of any two of: accommodation, transport, or other tourist services not ancillary to transport. Most package arrangements come within scope of the regulations unless they are 'occasional' or part of an educational course programme as compared with a leisure activity such as skiing. At the time of this booklet's production, the legal position of packages arranged as part of an educational course is subject to the effects of a future judgment in the European Court of Justice. Heads should be aware of these regulations in case the visit they are planning is within scope of the regulations.

N4 Taking the school/centre minibus abroad

Visit leaders should ensure that drivers taking groups abroad are familiar with driving the coach or minibus abroad. EC regulations require the fitment and use of a tachograph and prescribe maximum limits on driving time and minimum requirements for breaks and rest periods. Please refer to [Section L](#) for more information.

Factors to consider when traveling abroad include:

- the need to be aware that different legislation and regulations may apply for drivers' hours and recordkeeping purposes, particularly in non-EU countries;
- EU drivers' hours and tachograph regulations normally apply to any vehicle with 9 or more passenger seats on journeys through EU countries and some countries outside the EU. In other countries, drivers must observe the domestic rules of the countries being visited. Advice on domestic rules may be obtained from the relevant embassies of the countries concerned concerned, or one of the major motoring organisations;
- special documentation is required for minibuses taken abroad;
- all group members should be made aware of right-hand drive traffic. The passenger doors on UK minibuses and coaches might not open on the kerb side in countries where travel is on the right hand side of the road. Extra care will be necessary when the group is climbing in and out of the vehicle;
- carrying capacity and loading requirements;
- the Department for Transport can provide detailed information on legal requirements for travel abroad.

N5 Using an independent provider such as a tour operator

Visit leaders should follow the guidance set out in [Section O Use of independent providers](#).

N6 **Sources of further advice for educational visits abroad**

- The Department of Trade and Industry - for the regulations governing tour operators;
- The Schools and Group Travel Association (SAGTA) is an independent association with a members' code of good conduct and safety rules. All its members are in ABTA;
- Alternatively, there are voluntary bodies established to promote school journeys, such as the School Journey Association;
- Heads or visit leaders who decide to arrange travel independently should seek the advice and help of the Foreign and Commonwealth Office's (FCO) Travel Advice Unit. The Unit's purpose is to help intending travelers to avoid trouble abroad. It can provide information on threats to personal safety arising from political unrest, lawlessness, violence etc.

All address details are provided in [Annex 6](#).

N7 **Planning and preparation**

It is good practice that an exploratory visit to the location is made. If this is not possible, the visit leader should gather as much information as possible on the area to be visited and the facilities from:

- the provider;
- the Foreign & Commonwealth Office's Travel Advice Unit;
- other schools/centres who have used the facilities/been to the area;
- the local authority/schools/centres in the area to be visited;
- national travel offices in the UK;
- embassies/consulates;
- travel agents/tour operators;

- the Internet, books and magazines.

The visit leader should also have appropriate additional contingency plans for dealing with the unexpected.

N8 Staffing the visit

Staffing levels need to be sufficient to cover an emergency including staff illness or injury. Consideration should be given to the ease with which a substitute member of staff may be able to join the group, should they be required for any reason. Where possible, mixed gender groups should have both male and female supervisors. Where this is not possible, parents should be informed of this prior to giving consent for the visit to go ahead. See [Annex 2](#) for suggested ratios.

N9 Preparing young people for visits abroad

Thorough preparation of young people for an overseas visit will contribute immensely to enjoyment, educational value and safety. Issues to consider will include:

- language - even a few common phrases will help;
- relevant legal differences and the consequences of breaking these laws;
- cultural differences such as dress codes, rules, local customs, behavioural norms and attitudes to drugs and alcohol;
- in some countries the risks associated with tap water and some foods, such as unpeeled fruit and raw vegetables, need to be explained;
- money – how to carry money and valuables discreetly (e.g. money belts). If larger amounts of money will be needed, it is advisable to take travellers' cheques or arrange to use an ATM. N.B. in some countries it can be very difficult to change travellers' cheques;
- communication - differing telephone systems, simple phrases;
- card with useful information e.g. accommodation address, action to take in an emergency (see also [Section M](#)).

N10 **Health**

Reciprocal European Health Insurance

UK residents may be entitled to free medical treatment or at a reduced cost, when temporarily visiting a European Union (EU) country. To obtain treatment, young people and staff will need to take a European Health Insurance Card (EHIC) with them. These can be applied for, free of charge, from the nearest post office.

Refer to the NHS Direct and FCO websites for up to date information on medical and other issues for the country you intend to visit.

It is advisable to have access to a contingency fund as sometimes treatment must be paid for in advance and money has to be claimed back later. ATMs may offer the most secure way to access a contingency fund.

Vaccines and Inoculations

If in doubt as to whether vaccination is required, consult a GP 4 months prior to the visit. Some courses of vaccination can take several weeks.

N11 **Insurance** (see also [Section K](#))

Travel insurance is vital for all visits abroad. The County Council may operate and administer a School Journey Insurance Scheme – check with your LA/County Council.

Many commercial companies offer insurance, often as an integral part of the visit package. Organisers are strongly advised to:

- check the detail of such insurance;
- check the suitability of such policies, where in doubt, with the County Council insurance section;
- advise parents/carers of the detail of the cover.

N12 **Language ability**

One of the adults with the group should be able to speak and read the language of the visited country. If not, it is strongly recommended that the leader or another adult learns enough of the language to hold a basic conversation and knows what to say in an emergency and that someone who is able to communicate fluently on behalf of the group is available at all times. It is also advisable that young people have a basic knowledge of the local language before the visit.

N13 **Visas/Passports**

Personal identification is required in many countries and for visits this is usually in the form of an individual passport and in some cases a visa. Visit leaders must check, well in advance of the visit, the current requirements with regard to individual and/or collective passports. Visit leaders are

strongly advised to check the validity of individual passports well before departure and to ensure their safety during the visit.

Visit leaders should bear in mind that, if travelling using a collective passport, they would need to obtain a temporary travel permit from the local British Embassy/Consulate for any young person who needs to return home early from a visit.

Some countries have an immigration requirement for a passport to remain valid for a minimum period (usually at least six months) beyond the date of entry to the country. Therefore, leaders will need to ensure that passports are in good condition and valid for at least 6 months at the date of return. This is a requirement of the country concerned, not the UK Passport Service. Any questions should be addressed to their Consulate or Embassy.

An emergency plan for the visit should consider action in case a member of staff becomes incapacitated or has to leave the visit. If the country visited requires a visa, is there a back up member of staff ready to travel and in possession of a visa?

N14 Nationality

If the group includes young people whose national or immigration status or entitlement to a British passport is in doubt, it is advisable to make early enquiries of the Home Office's Immigration and Nationality Directorate (see [Annex 6](#) for address details) concerning the requirements of the immigration rules and the right of re-entry.

Young people who are not nationals of any EU member state may need a visa to travel from the UK to another member state. However, they may receive visa exemption if they are members of a school/centre group. Details and forms are available from the Central Bureau for Educational Visits and Exchanges. (See [Annex 6](#) for contact details.)

Young people other than EU nationals may require a separate passport and may need to use separate passport control channels from the rest of the group.

N15 Care orders and wards of court

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

N16 Paperwork

It is essential that visit leaders take with them (where appropriate):

- travel tickets, passports and visas;

- a copy of the contract with the centre/hotel etc. if appropriate;
- medical papers, e.g. European Health Insurance Card (EHIC) and significant medical histories;
- parent/carer consent forms and permission for the visit leader to authorise emergency treatment on parents/carers' behalf;
- the telephone numbers and addresses, at home and in the school/centre, of the Head and emergency contact;
- the names of parents/carers and the addresses and telephone numbers at which they can be contacted (home and workplace);
- copies of a list of group members and their details;
- details of insurance arrangements and the company's telephone number;
- the name, address and telephone number of the group's accommodation;
- location of local hospital/medical services.

It is important that copies of all of the above, including serial numbers of travel documents, passports etc, be taken and kept separately in the event of loss of originals.

Visit leaders may wish to ask parents/carers for passport size photographs of the young people. It might be useful to have photographs of the adults in the group as well.

Copies of most of the above information should be left at the school/centre for the duration of the visit. school/centre emergency contact arrangements must ensure accessibility to such information at all times during the visit and to the LA emergency contact, normally the appropriate Education Officer.

N17 Information retained at the school/centre

Full details of the visit should be retained at school/centre while the visit is in progress. This should include:

- the itinerary (including contingency plans) and contact telephone number/address of the group;
- a list of group members and their details;
- contact names, addresses, telephone numbers of the parents/carers and next of kin;
- copies of parent/carer consent forms;

- copies of travel documents, insurance documents, medical papers;
- a copy of the contract with the centre/hotel etc, if appropriate; and
- LA emergency contact numbers.

It is the Head's responsibility to ensure this information is available at all times. This is particularly important if the visit takes place when the school/centre is closed. Independent school bursars should also hold the information.

N18 During the visit

It is advisable for young people to carry a note in the relevant foreign language for use if they get lost, asking the reader to re-unite them with the group at the accommodation/meeting point, or to take them to the police station. They should also carry the visit leader's name and the duty contact's phone number.

Visit leaders should consider whether group members should carry an 'emergency fund' of foreign currency at all times e.g. money for telephone (or a phone card).

N19 Dealing with emergencies

The recommendations given in [Section M](#) are of particular importance for visits abroad and organisers should check that adequate arrangements are made. All group members should be made aware of these procedures.

Visit leaders need to be aware that some diseases are more prevalent in some countries than in others and should know what action to take should a member of the group become infected.

Many of the health problems of young people on longer visits are caused by a lack of food, liquid or sleep and issues associated with hot climates.

The visit leader should take this into account at the planning stage and take measures to prevent these risks. If appropriate, parents/carers should be asked to provide suitable factored sun protection cream and sun hats/glasses. Visit leaders may issue group members with sun cream unless parents/carers have indicated that their child has a specific allergy to sun cream. Group members should be advised about the dangers of over-exertion in the heat and of dehydration. In warm climates it is important to keep fluid levels high, take rehydration salts and wear loose, lightweight clothing – preferably made of cotton or other natural fibres.

An emergency plan for the visit should consider action in case a member of staff or a young person becomes incapacitated or has to leave the visit.

N20 Travel by air

Taking a school/centre group on an aircraft requires careful planning and preparation. The airline/travel agent will be able to advise on particular requirements. If the group includes any members with disabilities, it is advisable to check that the airline has a wheelchair service and lifting facility etc, if appropriate. Where possible, the visit leader should resist any attempt by the airline to split the group between different aircraft.

N21 **Exchange visits**

See also the activity pointer for this activity in [Annex 4](#).

Exchange visits can provide valuable and often unique experiences for young people to experience other cultures, develop new friendships and broaden their horizons and knowledge. Staying with a host family gives young people a first hand opportunity to use their language skills in a real context.

Exchange visits differ from other visits in that young people spend most of their time with host families and are, therefore, not always under the direct supervision of teachers/youth workers. Expectations and assurances should be established for all parties involved (young people, teachers/youth workers, host families and schools/centres) and these must be fair and reciprocal wherever possible.

The following issues should be considered by visit leaders when planning an exchange visit:

- Are families and young people carefully matched with regard to issues such as gender, diet, religious belief, special needs etc?
- Are families known to the host school/centre and have they been confirmed as suitable?
- Are contingency plans in place to allow a young person to be moved at short notice?
- Has consideration been given to the safety and well-being of the young people during travel, and does this include appropriate drivers and transport whilst with the host family?
- Are young people and host families aware of emergency procedures including access to a 24 hour contact number?
- Do leaders have daily contact with all young people and do young people have an agreed 'keyword' which they can use which means 'I want you to visit me immediately'?
- Will young people have access to a phone and/or can they use a mobile phone to call or text messages if necessary to staff?
- Have young people been briefed about personal safety?
- Does work experience feature as part of the exchange and if so, has an assessment been made by an appropriate person about any significant hazards the work environment may present? Does the LA policy for work experience cover work experience abroad?
- Have acceptable and unacceptable activities on 'family days' been discussed and has

parent/carer agreement been sought prior to the visit if necessary?

N22 **Exchange visits: host families**

Careful matching of exchange partners is central to successful visits and host families should be confirmed as suitable by the host school/centre. Factors to consider include:

- Code of Conduct;
- House rules;
- Home visit checks;
- Sleeping arrangements;
- Family activities;
- Transportation including drivers;
- Providing information to, and receiving information from host, families.

N23 **Exchange visits: resources**

“The Protection of Young People in the Context of International Visits”

Obtainable from:

Publications Unit

Children and Families

City of Edinburgh Council

Waverley Court Business Centre 1/2

4 East Market Street

EDINBURGH EH8 8BG

"Advice for Schools" (Child-safe Travel-safe) www.child-safe.org.uk

"Advice for Host Families" –as above

"Advice for Parents and Guardians" – as above

"Advice for Young People" pamphlet

Obtainable through website, or tel: 01737 812727, or by post from:

Child-safe Travel-safe

Avon and Somerset Constabulary

c/o Boffin Book Services

24 Walton Street

Walton on the Hill

SURREY KT20 7RT

Section O

Use of independent providers

[Selection of provider – pre-booking checks](#)

[Who is responsible for leadership and supervision during the visit?](#)

[Financial security](#)

[Collection of deposits and accounting](#)

[Package travel regulations 1992](#)

[Adventure activity providers based abroad](#)

There are a large number of providers in the UK and abroad offering a wide range of services for school and youth service groups. Many of these operators offer good quality services but wide variation exists and some are poor. Visit leaders are strongly advised to apply the following guidance when selecting an independent provider.

It is imperative that appropriate checks are made by the Head, EVC or visit leader before groups commit themselves to working with any external organisation.

To ensure that parents/carers/staff are protected and County Councils can fund legal action in relation to the contract it is important to ensure that any booking form (contract) is signed on behalf of the school/centre and **not by parents/carers or individual visit leaders**.

01 Selection of provider – pre-booking checks

For **any** off-site visit, check that the location and activities offered are educationally suitable for your group and are commensurate with the aims of the visit. Check that any provider offers good value for money by comparing with other similar providers. Remember that there is no substitute for firsthand, up to date information (see [Section C3](#)). This level of pre-booking check is usually sufficient for visitor attractions and public access venues such as zoos, historical/cultural sites, museums, sports stadia, theatres, cinemas, hotels, bowling alleys, ice rinks, theme parks, public access (lifeguarded) swimming pools or similar.

When using a specialist venue or activity provider e.g. outdoor activity provider (residential or non-residential), farm visit or similar please apply the following guidance **before signing any booking form or contract**:

Ask the provider to complete the independent providers' questionnaire ([model form EV5](#)) and check that this has been satisfactorily completed by the provider before you book. This requires them to confirm that they have risk assessments in place for all activities/services that they provide and that these are available to view at the premises on request. **Please note that there is no need to obtain copies of the provider's risk assessments.** Seek specialist advice on any concerns arising from the provider's responses by contacting your LA Outdoor Education Adviser.

The Learning Outside the Classroom (LotC) Quality Badge

The Learning Outside the Classroom Quality Badge is an accreditation scheme initiated by the Department for Children, Schools and Families in England. Although some providers in Wales have gained the Quality Badge, the scheme has not been officially recognised in Wales.

02 **Who is responsible for leadership and supervision during the visit?**

This must be agreed in advance between the visit leader and independent provider. You must be clear about:

- times when the provider will have sole responsibility for leading and supervising the group (e.g. during activity sessions);
- times when the responsibility will be shared between the provider and you/your staff (e.g. during activity sessions);
- times when you/your staff will have sole responsibility for leading and supervising the group (e.g. before/between/after activities, meal times, overnight and during travel to and from the venue).

When the responsibility is to be shared, the visit leader and provider should agree how these responsibilities will be shared (e.g. provider responsible for technical leadership, visit leader responsible for behaviour management). Any grey areas should be resolved through discussion and agreement with the provider. Please note that the provider is responsible for risk assessing the elements that they are responsible for and you and your staff are responsible for risk assessing the areas that you will be responsible for. For more on risk assessment please see section [C9](#).

The visit leader or other leaders may intervene at any time if they are concerned for the safety or well-being of the young people in their care, including during sessions led by an independent provider.

03 **Financial security**

In view of the substantial number of liquidations in the travel industry in recent years it is essential that visit leaders select operators bonded with the Association of British Travel Agents (ABTA) or those able to prove financial security through other means.

Financial security options may differ for visits abroad and for those in the UK but include:

- membership of a DTI-approved bonding organisation. These are:
 - Association of British Travel Agents (ABTA)
 - Federation of Tour Operators Trust (FTOT)
 - Association of Independent Tour Operators Trust (AITOT)
 - Passenger Shipping Association (PSA)
 - The Confederation of Passenger Transport (CPT)
 - Yacht Charter Association (YCA)
 - The Association of Bonded Travel Organisers Trust (ABTOT)

The Civil Aviation Authority licences travel organisers and tour operators selling air seats or packages with an air transport element (Air Travel Organisers Licence or ATOL). The licence is a legal requirement and provides security against a licence holder going out of business.

A travel agent does not need to be an ATOL holder if acting only as an agent of an ATOL holder.

But if so the visit leader must check whether or not the whole package being supplied is covered by the ATOL. If it is not, the organiser must show evidence of other forms of security to provide for the refund of advance payments and the costs of repatriation in the event of insolvency.

- placing of deposits with a secure third party, e.g. bank or solicitor, released only on agreement of the party leader;
- insurance against the effects of liquidation.

Unless the above security can be obtained visit leaders should avoid using companies/operators offering educational packages, however attractively priced.

04 **Collection of deposits and accounting**

Visit leaders will frequently have to act as agents for the authority or school/centre in the collection and accounting of parental contributions. Leaders must, at the early planning stage, familiarise themselves with arrangements for financial accountability within the school/centre

It is particularly important to:

- ensure that the Council requirements and the school's/centre's internal procedures for financial accountability are adhered to;
- have specific times for collection and receipting of deposits and to avoid ad hoc arrangements;
- ensure that monies are not credited, or bills paid, through an individual visit leader's personal bank account, however convenient this may appear, without the specific, prior, written approval of the Head;
- ensure simultaneous recording/receipting of amounts collected;
- maintain adequate records to ensure that all monies due are identified and collected;
- make arrangements with the school/centre for the hand over of records and monies as appropriate.

05 **Package Travel Regulations 1992**

The Package Travel, Package Holidays and Package Tours Regulations 1992 came into force on the 31st December 1992 and could affect the organisation of some school/centre visits and journeys.

The regulations apply to all 'packages' (see below) sold or offered for sale in the UK and provide for both civil remedies and protection as well as criminal offences. Its objectives are to ensure that:

- information given in brochures is correct (Trading Standards will also intervene if brochure information is wrong or misleading.);
- the operator is strictly liable for the contract;
- operators have security for prepayments and for repatriation of customers as a result of insolvency;
- operators can be prosecuted for non-compliance and sued for non-performance.

A "package" is defined in the regulations as a set of services which:

- includes an overnight stay or last more than 24 hours;
- incorporates two or more elements of i) accommodation ii) transport iii) 'significant' tourist services;

- is 'pre-arranged' i.e. the elements are put together before conclusion of the contract;
- is sold or offered at an inclusive price even if separate invoices are submitted for different elements.

Most residential visits arranged by schools/centres through an external operator, e.g. a commercial travel company, will fall within the Regulations. Since the external operator is the provider of the package, it is the responsibility of the operator to comply with the Regulations.

Schools/centres must check that the package operator provides adequate financial security in the event of insolvency through an appropriate bonding or trust arrangement.

It is understood that packages arranged as part of the formal curriculum of the school/centre are exempt from the Regulations. Other journeys, in which the elements are packaged by the school/centre and 'sold' to parents/carers, will be subject to the Regulations. This applies particularly to activities that are not part of the formal curriculum.

Whether or not packages offered by schools/centres fall within, or are exempt from, the Regulations, organisers should apply the same clarity of information and financial protection as is required by the Regulations.

Consequently, the organisers of school/centre journeys are strongly advised to ensure that:

- the information given to parents/carers is correct and is provided, wherever possible, in writing;
- what is provided (eg accommodation standard, transport and/or activities) is as described;
- adequate insurance cover is provided as part of the package, including cover for repatriation where appropriate. County Council School Journey Insurance Schemes, where available, are recommended.

An English language copy of a guide for organisers and retailers - 'Looking into The Package Travel Regulations' can be obtained by ringing the Department of Trade and Industry's 'Leaflet Line'. Telephone 0207 215 0344.

Organisers with particular concerns may wish to contact the Trading Standards Department on 0845 3030666.

Please ensure that the guidance given above is followed before signing any booking form or contract with an external provider.

For visits or activities that require LA approval/notification, Visit leaders should ensure this is arranged at least 28 days before the visit is due to take place (see [Section P](#) for details of LA approval/notification procedures).

The final decision to proceed with the visit, based on all available information and advice, is the responsibility of the Head and Governing Body.

06 **Adventure activity providers based abroad**

The Adventure Activities Licensing Regulations do not apply to providers based abroad. Visit leaders should ensure that the activity qualifications of any instructors provided are to the relevant national awards of the country visited. The Outdoor Education Adviser can give further advice.

Visit leaders wishing to use an Overseas Expedition provider must follow the detailed guidance set out in [Annex 10 Overseas Expeditions](#).

Section P

Visit approval/notification procedures

[Table Pi: Visit approval/notification required for different types of visit](#)

[Table Pii: Definition of locations](#)

[Table Piii: Adventure activities](#)

[Internal approval](#)

[Series approval](#)

[LA leader approval](#)

[Arranging LA approval/notification: visits other than Duke of Edinburgh's award expedition groups](#)

[Arranging LA approval: Duke of Edinburgh's award expedition groups](#)

[Overseas expeditions organised through an independent provider](#)

[LA approval decisions](#)

[Record keeping](#)

[Monitoring](#)

Table Pi. - Visit approval/notification required for different types of visit






Visit type	Approval/notification required	Supporting documents required
All educational visits (i.e. away from the school/centre site)	approval by Head/EVC (may be done on a termly, annual or other periodic basis for regular visits)	<ul style="list-style-type: none"> • If using an independent activity provider - copy of completed Independent provider questionnaire (see Section Q, model form EV5) or the provider's equivalent written assurances. • Form EV1 (See Section Q, model form EV1)
Residential visits and visits abroad (but not including any of the elements listed in the 3 rows below)	approval by Head/EVC followed  by LA notification at least 28 days before visit	As above
Visits involving: <ul style="list-style-type: none"> • adventure activities and/or; • demanding environments. (see Table Pii & Piii for a definition of locations & adventure activities)	approval by Head/EVC followed  by LA approval at least 28 days before visit	As above plus <ul style="list-style-type: none"> • if leading a journey or expedition - copy of route (electronic or hard copy)
Duke of Edinburgh Award expeditions	approval by Head/EVC followed  by LA approval at least 28 days before the expedition for expeditions involving demanding environments or adventurous activities as defined in tables Pii and Piii of this section	As above plus <ul style="list-style-type: none"> • copy of green DofE Wild Country Expedition notification form if relevant • copy of blue DofE form if going abroad
Overseas expeditions (i.e. trekking or similar adventure activity in a third world country) using an independent provider.	approval by Head/EVC followed  by Initial LA approval >12 months beforehand followed  by Final LA approval > 8 weeks beforehand	<ul style="list-style-type: none"> • Form OE 1 (See Annex 10) at least 12 months before expedition • Form OE 2 (See Annex 10) at least 8 weeks before expedition • Form EV1 (See Section Q, model form EV1)

Table Pii. Definition of locations.

This table explains the classification of locations detailed in [Table Pi](#).

Important note: classification of locations is subjective. Any visit leader unsure of whether or not a location requires LA approval should seek the advice of the Outdoor Education Adviser.

Location	Definition	Level of approval required
Normal countryside	<p>Areas;</p> <ul style="list-style-type: none"> • which are close to vehicle access (i.e. less than 30 minutes walking time for any group member to the nearest road from which the group could be easily evacuated) and • where the environment does not have any of the features of a 'demanding environment' listed below. 	Visits here require Head/EVC approval but do not require LEA approval
Demanding environments	<p>Areas where there is significant risk to the group from one or more of the following factors;</p> <ul style="list-style-type: none"> • hazardous terrain (e.g. cliffs, very steep slopes etc.); • remoteness (i.e. more than 30 minutes walking time from the nearest point from which the group could be easily evacuated); • difficult escape (i.e. places where the group could be trapped and/or where they would need specialist help to escape); • exposure to severe weather (i.e. open to the weather and no easily accessible shelter within 30 minutes walking time for any of the group); • open areas without clear paths where technical navigation skills are required in poor visibility; • open areas without clear boundaries where the group might stray into hazardous or remote terrain in poor visibility; • fast flowing water, deep water, or water with strong currents (including tidal flow) where: <ul style="list-style-type: none"> <input type="checkbox"/> the group will be close to the water and there is a significant risk of someone falling in; or <input type="checkbox"/> the group will be entering the water. 	Visits here do require LA approval in addition to Head/EVC approval

Table Piii. Adventure activities

Important note: This list is not exhaustive. Any visit leader unsure of whether or not an activity should be classified as an adventure activity should seek the advice of the Outdoor Education Adviser.

Land Based Activities	Water Based Activities
Rock climbing and abseiling	Kayaking and canoeing
Mountaineering	Sailing and windsurfing
Hill walking	White water rafting
Ice climbing	Waterskiing
Gorge or coastal scrambling/sea cliff traversing/coasteering	Snorkel and aqualung diving
Underground exploration – cave or mine	All forms of boating (excluding commercial transport)
Skiing (snow/dry slope)	Improvised rafting
Air activities (except commercial flights)	Kite surfing
Horse riding and pony trekking	Surfing and body boarding
High ropes courses	Dragon boating
Indoor climbing walls	Wave skiing
Quad biking/ATV's	Jet skiing/personal water craft
Orienteering	
Mountain biking	
Any activity (including camping, fieldwork and non-adventure activities) taking place in demanding environments as defined in Table Pii above	
Other activities (e.g. problem solving exercises) if they involve activities and risks of a similar nature to the activities listed above.	

Important note: LAs may decide to delegate a wider range of responsibility for approval to schools/centres that have experienced and competent EVCs. Such an arrangement should be clearly set out in writing and should also make clear that any person delegated to carry out the task of approval of these categories of visits is doing so on behalf of the LA.

P1 Internal approval – all visits

Schools/centres must adopt a clearly defined procedure for the approval of all visits off the school/centre site. Form EV1 ([Section Q, model form EV1](#)) is recommended for schools/centres to adopt or adapt for this purpose.

Electronic systems - visit planning, approval and monitoring

Electronic systems designed to support visit leaders, EVCs and LAs with visit planning, approval and monitoring offer an opportunity to reduce time and labour for all concerned. A number of companies offer such electronic systems on a commercial basis in the UK and may offer their services in Wales. It is for LAs to decide which particular system, if any, can meet their requirements for visit planning, approval and monitoring.

P2 Series approval

Series approval may be given:

- by Heads/EVCs for regular, repeated visits (e.g. regular PE fixtures, local walks etc.). Specific approval should be sought if a particular visit is significantly different to the approved norm;
- by the LA for those staff who have gained LA leader approval (see [Section P3](#)).

The visit leader must ensure that their emergency contact(s) has details of the venue, activity, group and start/finish times for each visit. [Model form EV3](#) is provided for visit leaders to adopt or adapt for this purpose.

P3 LA leader approval

LA employees (including teachers and youth workers) who wish to lead in any of the environments (detailed in [table Pii](#)) or activities ([table Piii](#)) for which LA approval is required must first be confirmed as technically competent to lead by the Outdoor Education Adviser. The Outdoor Education Adviser will maintain a database of LA approved leaders.

Depending on depth of experience and technical skill, leaders may be given written approval to lead either:

- a one-off visit;

Or:

- the activity/activities at specific, named venue(s) at any time for the duration of the approval period;

Or:

- the activity/activities at all venues that are within the remit of their competence at any time for the duration of the approval period.

LA approval will be based on:

- Verification by the Head/EVC of the employee's general competence (other than technical competence) to manage a group of young people involved in this type of activity;
- Evidence of appropriate induction and personal experience of the activity;

Plus either:

- Holding the relevant National Governing Body (NGB) leadership award (NGB leadership awards for activities are set out in [Annex 3](#));

Or:

- A written and signed statement of competence by an appropriate technical adviser verifying that the leader has the relevant technical and group management skills in the activity. Technical adviser approval may be given when the following conditions are met:
 - The leader has completed a training course in the relevant NGB leadership award where one exists (or has undergone other appropriate training)
 - The technical adviser has made a practical assessment of the leader and can confirm that they are operating at the standard of the relevant NGB leadership award

Appropriate levels of technical adviser for different activities and levels of activity are given in [Annex 3](#). If the intended activity is not listed in Annex 3, the LA Outdoor Education Adviser may be able to advise on appropriate level of technical adviser.

Individuals seeking LA leader approval should send a completed Form EV6 (Section Q, [model form EV6](#)) to the Outdoor Education Adviser.

P4 LA approval/notification: visits other than Duke of Edinburgh's Award expedition groups

Following approval by the Head/EVC, LA approval/notification must be arranged for any visit that requires LA approval or notification (see [Table Pi](#) for details) by completing and sending:

- Form EV1 (Section Q, [model form EV1](#));
- any other required supporting documents as detailed in form EV1;

to arrive with the Outdoor Education Adviser **at least 28 days before** the visit/visits.

P5 LA approval: Duke of Edinburgh's Award expedition groups

Following approval by the Head/EVC, LA approval/notification must be arranged by completing and sending:

- Form EV1 (Section Q, [model form EV1](#));
- any other required supporting documents as detailed on [form EV1](#);

to arrive with the LA Duke of Edinburgh Award Officer **at least 28 days before** the visit.

P6 Overseas expeditions organised through an independent provider

Approval procedures for overseas expeditions (to a third world country involving trekking or other adventure activities) organised through an independent provider are set out in [Annex 10](#) of this guidance. These must be applied in full by any school/centre wishing to arrange such a visit. Please note that outline approval must be sought from the LA **at least 12 months before** the visit and before any contract is signed with the company.

P7 LA approval decisions

Decisions on approval will be based on satisfactory compliance with the LA's guidance.

Where this is satisfactory, confirmation of approval will be sent to the EVC/Head by e-mail, fax or letter. **Visits that require LA approval must not proceed until this approval has been given.**

Where further information or elements of this guidance have not been applied, approval will be withheld until these conditions are met. Confirmation of this decision will be sent to the EVC/Head by e-mail.

P8 Record keeping

The Head or EVC should keep an up to date historical record of all educational visits organised by the school/centre.

P9 Monitoring

Under their Health and Safety obligations, the Head/EVC must monitor, from time to time, for compliance with LA guidance by visit leaders within the school/centre and the LA must monitor, from time to time, for compliance with LA guidance by all educational establishments. Monitoring plays a vital role in determining further development needs for visit leaders.

Monitoring should include:

- occasional observation of visit leadership;
- consideration of visit planning and organisation as part of the visit approval process.

Following any observation of visit leadership it is good practice to provide verbal and written feedback and recommendations to the visit leader. Copies of the observation report should be kept on file by the school/centre (or LA if appropriate) and given to the visit leader (and their Head/EVC if monitoring has been carried out by the Outdoor Education Adviser).

For further advice contact the EVC or Outdoor Education Adviser.

Model forms

The forms included in this section are provided for LAs, employers, schools and centres to adopt or adapt.

Model form EV1	One-off or occasional visits: planning and approval form
Model form EV2	Visit evaluation form
Model form EV3	Routine visits and visits given blanket approval: planning form
Model form EV4	Parent/carers consent form: one-off or occasional visits
Model form EV5	Independent provider questionnaire
Model form EV6	Application for registration as LA approved leader
Model form EV7	Visit planning checklist
Model form EV8	Parent/carers consent: routine off-site visits
Model form EV9	Summary of information about young people and adults participating in a visit
Model form EV10	Emergency action flowchart
Model form EV11	Base contact: dealing with an emergency call flowchart
Model form EV12	Incident record form
Model form EV13	Risk assessment form
Model form EV14	Parent/carers information letter template

Model form EV1

One-off or occasional visits: planning and approval form

LA approval/notification

- LA approval is required for visits involving adventurous activities and visits to demanding environments as detailed in [Section P, Educational Visits](#).
 - LA notification is required for residential visits and visits abroad.
 - Where required, LA approval/notification must be arranged by the EVC by sending this form and submitting it to the Local Authority Outdoor Education Adviser at least 28 days before the visit.
- **Visits that require LA notification are free to proceed after the LA has been notified.**
 - **Visits that require LA approval must not proceed until confirmation of LA approval has been received by the EVC/Head.**
 - **Visits that do not require LA approval or notification are free to proceed after the EVC/Head has approved the visit.**

School / establishment _____

Name of EVC _____

Telephone _____ Email address _____

- Visit leaders should obtain verbal approval for their visit from the Head/EVC before detailed planning.
- After the visit has been approved, the Head/EVC (and LA if applicable) must be informed if there are any subsequent changes in planning, organisation and staffing.

Note: If a section of this form is not applicable please write N/A.

Visit leader _____

Contact number during visit _____

Purpose of visit and educational objectives _____

Places to be visited _____

Departure Date _____ Time _____ Place _____

Return Date _____ Time _____ Place _____

Transport arrangements (include the name of any transport company):

Cost per participant: _____

Participant information

The following must be obtained prior to the visit, copies to be kept at school and taken on the visit by the visit leader:

- Parent/carers consent for all young people taking part in the visit.
- A list of all young people and adults taking part in the visit.

Number of young people: Male _____ Female _____ Age range _____

Accompanying adults (continue on separate sheet if necessary)

Name	Male or female? (M/F)	Employee or volunteer?	Responsibility during visit	Relevant qualifications/experience

Have any of the participants any special educational or medical needs: Yes/No

If yes, what arrangements are in place to support them? (continue on separate sheet if necessary):

Name of young person	Special need(s)	Support arranged	Person responsible for this young person (if required)

Independent provider(s) to be used (if any):

Name of Company/Organisation _____ Tel _____

Address _____

Postcode _____

Website _____ E-mail _____

If using a specialist activity provider e.g. outdoor activities (residential or non-residential), farm visit or similar ask provider to complete the independent providers' questionnaire ([model form EV5](#)). This should be

completed by the provider before you book.

Attach a copy of the completed questionnaire to this form.

Insurance arrangements:

Insurers: _____ Address: _____

Policy and policy no: _____ Expiry date: _____

Accommodation to be used:

Name: _____ Address: _____

_____ Telephone Number: _____

Name of Head of Centre/proprietor/contact: _____

Emergency contact details if different from above: _____

Planned itinerary (or attach a copy of the itinerary/programme): _____

24 hour emergency contact(s) (senior staff member(s) not present on the visit who holds all the information about the visit and has been trained in action to take in the event of an emergency):

Name: _____ Contact details: _____

Name: _____ Contact details: _____

Existing knowledge of venue(s) and whether an exploratory visit is intended:

_____ Date of last staff visit _____

Risk assessment

Is there a school/centre risk assessment(s) for this activity? Yes/No

If **no**, please complete a risk assessment for the visit and attach to this form.

If **yes**, does it cover all of the significant hazards you have identified for this activity/visit/group? Yes/No

If yes, please attach a copy. If no, please attach a copy **and** also complete the table below.

Hazards and safety measures

Please list the significant hazards and safety measures (e.g.group/weather etc) **above and beyond** those listed in the school/centre risk assessment for this activity. Continue on separate sheet if necessary. If none please write **NONE** in hazards column. If there is no school/centre risk assessment for this activity please list all significant hazards and safety measures for the visit here (and continue on separate sheet if required)

Significant hazards	Who might be harmed?	Safety measures that will reduce risk to a tolerable level

EVC/Head approval (visits must not proceed until approval has been given)

☐ I have studied this application and am satisfied with all aspects including the planning, organisation, staffing, insurance cover and emergency arrangements for this visit. Approval is given. Let me know

Your evaluation of the visit including details of any incidents should be with me as soon as possible but no later than 14 days after the party returns.

It is not possible to grant approval for this visit at this stage. I will contact you to discuss details.

EVC/Head full name:

Additional supporting documents required for specified visits		
Visit type	Documentation required for approval/notification	Enclosed
Visits where establishment staff will be leading or overseeing a journey/expedition (including D of E Award expeditions) in demanding environments as detailed in Table Pii , <i>Educational Visits</i>	Routes marked on a 1: 25,000 or 1: 50,000 OS map or similar (photocopies acceptable) or an electronic route map	Yes/No
	PLUS For D of E expeditions;	
	<ul style="list-style-type: none"> • <u>for expeditions in areas of Wild Country in the UK;</u> a copy of the green Wild Country Expedition notification form; • <u>for ventures abroad;</u> a blue form, available from the Duke of Edinburgh's Award Brecon office 	Yes/No Yes/No

<u>All visits other than D of E expeditions</u> [LA Outdoor Education Adviser contact details here]	<u>D of E expeditions only</u> [LA D of E Award Officer contact details here]

Visit evaluation**To be completed by visit leader after the visit**

Were there any accidents or incidents on this visit?

If yes, please attach and return to the EVC:

- a copy of the accident/incident report
- details of any relevant witness statements
- details of any action taken as a result of the accident/incident
- the parent/guardian consent form(s) for the young person/people involved.

Did the visit meet the intended educational aims?

Aspects of the visit that were particularly successful (continue on separate sheet if necessary)

Aspects that you would change for future visits (continue on separate sheet if necessary)

Model form EV3

Routine visits and visits given blanket approval: planning form

Note: all off site visits must be approved by the Head / EVC before taking place.

Leave a copy of this form with the school / centre emergency contact.

Purpose of visit			
Visit leader		Name of school/centre	
Visit location (s)		Start date and time	
Return date and time		Transport used - reg. number(s)	
Activity/activities (or attach programme)		Mobile phone number (s) carried	
Other staff/adult helpers (or attach list to this sheet)			
Emergency contacts (name and number)	Name	Number	
Group members (or attach list to this sheet)	Names	Special medical/behavioural needs	

Hazards and safety measures

Please list the significant hazards and safety measures (e.g.group/weather etc) **above and beyond** those listed in the risk assessment for this series of visits. Continue on separate sheet if necessary. If none please write **NONE** in hazards column.

Significant hazards	Who might be harmed?	Safety measures that will reduce risk to a tolerable level

Model form EV4**Parent/carers consent for one-off or occasional educational visits**

To be completed for participants less than 18 years old and distributed with an information sheet/letter giving details of the visit.

School/centre: _____

Visit/activity: _____

Venue: _____ Dates: _____

Your child's name _____ Date of Birth: _____

Medical and dietary

a) Does your child have any medical condition that may effect him/her during the visit? YES/NO

If YES, please give brief details: _____

b) Please give details of any allergies (including allergy to medication):

c) Please list any type types of non-prescription medication or lotions your child may **not** be given:

d) Please give details of any special dietary requirements of your child:

e) Please detail any recent illness or accident suffered by your child that staff should be aware of?

f) To the best of your knowledge, has your son/daughter been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may be contagious or infectious? YES/NO

If YES, please give brief details: _____

g) does your child require any other support or care during the day / night? YES/NO
If YES, please specify:

h) When did your son/daughter last have a tetanus injection? _____

Water confidence/swimming ability

Please indicate your child's swimming ability: Cannot swim ☐ Able to swim a little in a swimming pool ☐

Able to swim confidently in a swimming pool ☐ Able to swim confidently outdoors (eg lake, river or sea) ☐

Your contact details

Telephone Home: _____ Work: _____ Mobile: _____

Home address _____

Alternative emergency contact

Name: _____ Telephone: _____

Address: _____

Family doctor

Name: _____ Telephone: _____

Address: _____

Declaration

- Having read the information sheet, and having understood the level of supervision to be provided, I agree to my child taking part in the activities described.
- I understand that all reasonable care will be taken of my child during the visit/activity and that he/she will be under an obligation to obey all directions and instructions given and observe all rules and regulations governing the visit/activity.

- I understand the code of conduct for the visit and the sanctions that may be used if my child breaks this code of conduct. I have discussed the code of conduct and sanctions with my child.
- I understand that if my child seriously misbehaves or is a cause of danger to him/herself or to others, then I may be asked to collect him/her or he/she may be brought home early from the visit/activity. In such a situation there will be no obligation on the school/centre to refund any money.
- In an emergency I agree to my son/daughter receiving medication and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present.
- I understand that activity images may be used for educational and/or promotional purposes.
- I understand the extent and limitations of the insurance cover provided.

FULL NAME OF PARENT OR CARER (print please): _____

SIGNED: _____ **DATE:** _____

To be completed by the young person

I understand that, for the safety of the group and myself, I will obey the rules and instructions of members of staff.

SIGNED: _____ **DATE:** _____

Model form EV5

Independent provider questionnaire

This questionnaire can be used by the visit leader as a basic check of a specialist activity provider e.g. outdoor activities (residential or non-residential), farm visit or similar. Visit leaders should ask the provider/venue to complete this form **before** making a booking.

Notes for independent providers and venues:

You may have your own documentation that covers the same information in a different format e.g. as a download from your website. This is acceptable as an alternative to this form.

If you do not supply this information in an alternative way then please complete all relevant sections of this form by answering **yes**, **no** or not applicable (**n/a**) after each question. If you wish to provide further information then please continue on separate sheet(s) and attach to this form. An electronic signature is acceptable on this form to allow you to email the completed form.

Name of Provider / venue

Address

Tel.

Email

Website

Name of person completing this form

Signed

Position in organisation

Date

1. Does the above Provider have any official recognition or accreditation?

If **yes**, please give details here:

2. Do you have written risk assessments for all of the premises/services/activities that you provide?

If **yes**, are these risk assessments available to view if required?

Important note: please do not send copies of your risk assessments.

3. Do you have safety and conduct rules for visiting groups?

If **yes**, how do you communicate these to the visiting group and their leader?

4. Do all of your facilities comply with relevant statutory requirements including Health and Safety at Work Act; Regulatory Reform (Fire Safety) Order 2005; Environmental Health and transport requirements?

5.

- ☐ Do you provide first aid equipment at the venue/activities?
- ☐ Will a trained first-aider be present while the group is visiting?

6. Can you provide, if required, contact details for similar groups who have recently used your services?

7. Do you provide opportunities for preliminary visits?

8.

- ☐ Do you provide activity equipment (e.g. personal protective equipment or play equipment)?
- ☐ Do you have a written and recorded system of safety/maintenance checks for this equipment?
- ☐ Where national standards exist, does the activity equipment conform to those standards?

9. Do you hold a public liability insurance policy which will be current at the date of the proposed visit, both in relation to all directly provided and sub-contracted activity?

If **yes**, please state here the Limit of Indemnity

10.

- ☐ Do you have written emergency procedures?
- ☐ For activities that take place off site do you have written late-back procedures?
- ☐ Do you have accident/incident/near-miss reporting and action procedures?

11. Do you have a procedure for dealing with complaints?

12. Residential establishments only

- ☐ Will the group be required to share sleeping accommodation with others not from their group?
- ☐ Are staff bedrooms adjacent to young person bedrooms?
- ☐ Is sleeping accommodation secure from intruders?
- ☐ Can the emergency services access the site easily if required?
- ☐ Do you carry out a fire drill with the visiting group before their first night?

13. Staffed venues or activities only

- ☐ Please indicate (by checking the relevant boxes) the group types that you/your designated supervisory staff have experience of working with:

Primary schools	<input type="checkbox"/>	Secondary schools	<input type="checkbox"/>	Youth Groups	<input type="checkbox"/>	Special schools	<input type="checkbox"/>
Young people with challenging behaviour	<input type="checkbox"/>	Sixth form and FE college students	<input type="checkbox"/>				

- ☐ Do you provide regular opportunities for liaison between your staff and staff of the visiting group?
- ☐ Is there a clear definition of responsibilities between your staff and staff of the visiting group?
- ☐ How do you inform the leader of the visiting group about aspects of the visit for which they will have responsibility?
- ☐ Have any Provider staff who may have significant contact with young people undergone an enhanced CRB check?
- ☐ Are these staff also registered with the ISA?

14. Adventure activities only

- ☐ Do you offer adventure activities that are licensable under the Adventure Activities Licensing Regulations (for details please refer to www.aals.org)?

If **yes**, please list on separate sheet and attach to this form

- ☐ Do you provide any non-licensable adventure activities

If **yes**, please list on separate sheet and attach to this form

- ☐ Are records of activity leaders' experience and competence available for inspection on site if required?

15. Please supply any additional information that you think may be helpful to the visit leader.

Model form EV6: Part 1

Application for registration as an LA approved leader: personal details

This form must be completed by LA employees who wish to lead any activities/visits that require LA approval (as detailed in [Educational Visits, Section P](#)). Completed forms should be sent, along with qualification certificates **or** a statement of competence by an appropriate technical adviser, to the LA Outdoor Education Adviser.

Important note: No visit leadership in this activity should be carried out until confirmation of approval has been received from the Outdoor Education Adviser. Approval may involve a practical observation of the applicant's leadership. Notification of approval will be by letter, fax or email.

NAME

ADDRESS

POSTCODE

TELEPHONE

E-MAIL

SCHOOL/CENTRE

POST HELD (please state if full or part time)

DATE STARTED CURRENT POST

PREVIOUS POSTS HELD FOR THE LA (with dates)

ACTIVITY/ACTIVITIES FOR WHICH REGISTRATION AS AN APPROVED LEADER IS SOUGHT

RELEVANT NATIONAL GOVERNING BODY AWARD QUALIFICATIONS OR STATEMENT OF COMPETENCE BY AN APPROPRIATE TECHNICAL ADVISER

Please send original copies of NGB certificates **or** statement of competence by an appropriate technical adviser in a SAE.
TITLE OF QUALIFICATION (include date completed and whether training only or full award):

FIRST AID

TITLE OF QUALIFICATION:

DATE OF EXPIRY:

TEACHING/YOUTH WORK QUALIFICATIONS

TITLE OF QUALIFICATION:

DATE AWARDED:

REFEREE – must be completed by Head or EVC before registration takes place.

*I support this application and confirm that the applicant has the **general competence** (other than technical competence) to manage a group of young people involved in this type of activity.*

REFEREE NAME:

POST HELD:

PHONE:

E-MAIL:

SIGNED:

DATE:

Important note: Referees are not required to confirm the applicant's **technical** competence to lead this activity. This will be assessed by the Outdoor Education Adviser or other Technical adviser.

LOG OF RELEVANT PERSONAL AND LEADERSHIP EXPERIENCE IN THIS ACTIVITY (NB use separate sheet(s) for each activity)

Please outline your recent personal and leadership experience in this activity. Continue on separate sheet(s) as necessary. Multiple trips to the same venue should be summarised e.g. *1995-2005, approx. 20 walks up Snowdon by PyG track or Miner's track.*

Important note: There is no need to complete this log if you have already documented your experience elsewhere e.g. in a National Governing Body leadership award logbook. Submit your logbook or a photocopy of relevant experience log to the Outdoor Education Adviser instead.

Date (s)	Venue/area	Details of route/activity and comments/notable events	Solo or group ?	Group size and age range (if applicable)	Your role in group e.g. participant, equal, leader, assistant leader

Model form EV6: Part 2

Application for registration as an LA approved leader: log of experience

Model form EV7

Visit planning checklist

This checklist is intended for use as an aide-memoir for the main elements of visit organisation as set out in the *Educational Visits* guidance. Schools/centres/EVC's/visit leaders are encouraged to modify this list to suit their needs.

Purpose of visit

- ☐ what are the aims of the visit?

Where and when do you intend to go?

- ☐ are venue, activities and time of year appropriate to aims and age/ability of group?
- ☐ have you planned alternative activities (plan B) in case you need to abandon your planned programme for any reason?
- ☐ if you are planning to use a specialist activity provider e.g. outdoor activities (residential or non-residential), farm visit or similar, have you obtained a completed independent providers' questionnaire ([model form EV5](#)) from them before you book?

Have you gained approval from your EVC/Head/Governors (and LA if required) prior to making any financial commitment?

Risk management

- ☐ have you carried out an exploratory visit?
- ☐ what are the main hazards (including for any plan B)?
- ☐ are the main hazards covered by the LA/school/centre risk assessment for this type of activity/visit?
- ☐ if yes, have you discussed these with other leaders and young people?
- ☐ if there are additional hazards and safety measures above and beyond the risk assessment, have you completed a specific risk assessment that details these additional risks and safety measures?
- ☐ Have you shared this with other leaders and young people and filed a copy?

Residential visits and visits abroad

- ☐ Have you notified the LA at least 28 days before the visit using form EV1?

Have you gained LA approval at least 28 days before the visit using form EV1? (as defined in [Section P](#)). Required for:

- ☐ Visits involving adventure activities
- ☐ Visits to demanding environments

Staffing

- ☐ Are adequate staffing numbers available, taking into account any special needs?
- ☐ Have you checked the advice on typical young person: staff ratios in [Annex 2](#)?
- ☐ Are staff competent for their roles on the visit?
- ☐ If establishment staff are planning to lead activities which require LA approval, have they obtained LA leader approval (see [Section P3](#))?
- ☐ Are Voluntary helpers being used? Are they appropriate? Are they insured, by being entered on the school/centre list of voluntary helpers? Are they aware of their responsibilities?
- ☐ Is a police check necessary for your helpers under the Child Protection Act?
- ☐ Does the visit involve young people working without the direct supervision of staff at any time?

Finance

- ☐ Is a charge or voluntary contribution involved? If so, have you made sure that this conforms to the

Education Reform Act charging regulations?

- ☐ Are you using a commercial operator or company? Is there financial security e.g. ABTA/ATOL?
- ☐ If relevant, does the visit conform to Package Travel regulations?

Insurance

- ☐ Is personal insurance cover for young people/staff provided?
- ☐ Have you checked any cover automatically provided by, say, a tour company?
- ☐ Are parents aware of the insurance position?

Parent/carer information and consent

- ☐ Have you provided parents/carers with full information regarding the visit and all planned activities (including plan B activities)?
- ☐ Have you met with parents/carers?
- ☐ Have they given appropriate written consent?
- ☐ Have you filed copies of the consent forms?
- ☐ Are they aware of the consequences of any misbehaviour by their child?

Special Needs

- ☐ Have you taken account of any special needs of young people/staff?
- ☐ Have you made all staff (including independent providers) aware of relevant special needs?

Programme

- ☐ Does your programme include alternatives (plan B) in case the original programme needs to be abandoned for any reason?
- ☐ Have you planned 'Down-time' arrangements?
- ☐ Have you arranged adequate supervision at all times? Duty rota for staff?
- ☐ Have you agreed standards of behaviour and conduct?

Clothing and Equipment

- ☐ Are clothing and equipment appropriate to the activities and location?
- ☐ Has young peoples' essential clothing been checked?

Medical arrangements

- ☐ Do you have a record of relevant medical information of all the young people and staff?
- ☐ Have you made appropriate medical arrangements, including first aid?
- ☐ Are there any special potential health hazards associated with the site?
- ☐ Are all staff involved aware of the above?

Accommodation

- ☐ Suitability? Pre-visit check?
- ☐ Fire precautions and certification? Fire drill?
- ☐ Young people security?

Transport

- ☐ Driver suitability?
- ☐ Drivers' hours?
- ☐ LA minibuses regulations?
- ☐ Insurance?
- ☐ Adequate stops, eating and care arrangements en route?

Visits Overseas

- ☐ Passports?
- ☐ Visas?
- ☐ Health/medical arrangements in place?
- ☐ Minibus Regulations (Tachographs)?
- ☐ Exchange visits: child protection procedures?

- ☐ Cultural issues?

Emergency procedures, contacts and communication

- ☐ Have you planned what to do in the event of an emergency during the visit?
- ☐ Have you established appropriate emergency contacts (24 hrs) with your base establishment and parents/carers? County press/media officer?
- ☐ Have you set up effective communication procedures with the group?
- ☐ Are you aware of establishment/LA emergency procedures?

Mobile phones

- ☐ Have you agreed a mobile phone use policy with parents and young people?

Post-visit review arrangements

- ☐ Review risk assessment and update if necessary – involve EVC.
- ☐ Review other arrangements and evaluate whether the visit met the intended aims
- ☐ Outstanding invoices paid
- ☐ Borrowed equipment returned
- ☐ Displays
- ☐ Parents'/carers' evening
- ☐ Report to Governors
- ☐ Thank you letters
- ☐ Article with photographs to the local media

Model form EV8

Parent/carers consent

Routine off-site visits

School/centre: _____

Your child's name: _____

I hereby agree to my child participating in standard visits off the school/centre site, but within the County or neighbouring area. These visits might include the following, or similar, activities:

List typical activities here

These visits will normally take place at the following, or similar, locations:

List typical locations here

I understand that:

- such visits will normally take place within the school/centre normal hours, but that if, occasionally, they are likely to extend beyond this, adequate advance notice will be given so that I may make appropriate arrangements for my child's return home;
- my specific permission will be sought for any visits beyond those listed above or which could involve commitment to extended journeys or times, expense or adventure activities;
- all reasonable care will be taken of my child during the visit;
- my child will be under an obligation to obey all directions given and to observe all rules and regulations governing the visit and will be subject to all normal school/centre discipline procedures during the visit;
- I must inform the school/centre of any medical or psychological condition or physical disabilities that may effect them during the visit;
- all young people are covered by the County Council's third party public liability insurance in respect of any claim arising from an accident caused by a defect in the school premises or equipment or

attributable to negligence by the Council or one of its employees. Please note that this insurance policy does not include personal accident or personal belongings cover

Full name of parent/carer: _____

Signature of parent/carer: _____ **Date:** _____

Address: _____

_____ **Tel:** _____

Model form EV9**Summary of information about young people and adults participating in a visit**

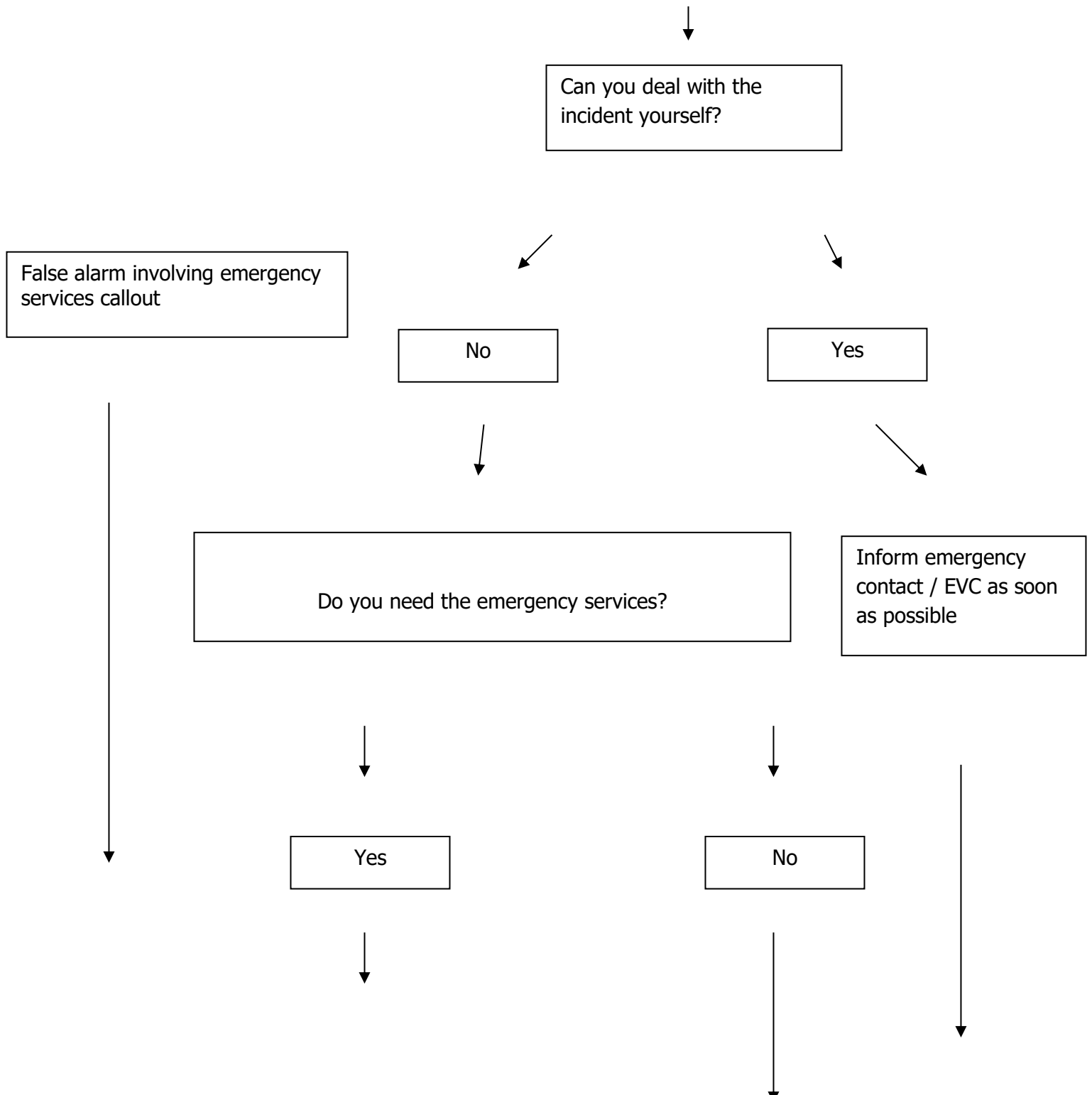
Surname	Forename(s)	Date of birth	Address	Next of kin	Contact number(s)	Relevant special needs/medical information

Model form EV10

Visit leader emergency action (copy to be carried by visit leader(s))

Do not speak to the media – direct all enquiries to _____

Give first aid if necessary. Make sure the rest of the group are accounted for and looked after.



Call emergency services



Call emergency contact insert number.

Emergency contact will follow emergency action flowchart.

Model form EV11

Base (emergency) contact: action on receiving an emergency call

Record information on 'Incident Record Form'.

Do not speak to the media – direct all enquiries to _____



YES



NO



Log telephone calls and timings and keep phone manned until incident is resolved.



NO



YES



Call for external assistance from emergency services if not already called.



Arrange assistance as required by staff at incident eg transport / evacuation.



Inform LA / employer

Complete incident/accident report form (and send to LA/employer if required).



Head / EVC to assess incident, recommend action and implement accordingly.

Model Form EV12

Incident record form

NB This form is to be used by an emergency contact during the period that they are handling an emergency call. The EVC should ensure that LA incident reporting procedures are followed as soon as possible after the incident.

ABOUT THE INCIDENT

Name(s) of any individual(s) affected by the incident _____

Time and date of incident_____

Location of incident_____

Activity taking place (if applicable)_____

Name(s) of staff leading the activity (if applicable)_____

Contact number for visit leader_____

Name(s) of key witness(es)_____

Description of incident and action taken (continue on separate sheets if necessary)_____

Form completed by_____Date_____

ACTION TAKEN TO AVOID A REPEAT INCIDENT (To be completed by Head or EVC following a review of the incident – continue on separate sheets if necessary).

Signed (Head or EVC)_____Date_____

Model form EV13

Risk assessment form

School/centre:

Visit date(s):

Visit leader:

Activity/activities:
Risk assessment completed by:

Venue:
Date risk assessment completed:

Significant hazards and harm which may occur	Who might be harmed?	Safety measures: <i>Measures that are in place and/or will be taken to reduce the risk to a tolerable level</i>

Additional notes:

Model form EV14

Parent/carer information letter template

Title of visit here

Dear Parent/carer ,

Re(name of visit and dates)

Your son/daughter is included on a visit/journey/expedition to (name of venue)

where he/she will participate in the following activities (list of activities)

The group will leave from (location) at (time) am/pm on (date) and is expected to return to (location) by (time) am/pm on (date)

Travel will be by (coach/minibus/air etc.)

The member of staff in charge of the group is (name) and other accompanying staff are (names of all staff)

There will be a total of (number) children on the visit comprising (number) boys and (number) girls.

Destination address is (address)

Telephone No. (number) (emergency use only)

The estimated cost of the visit is (amount) which includes (list here all inclusions).

It does not cover (list here all exclusions).

Payment may be made in the following ways (detail here arrangements, dates and cancellation/late payment penalties).

Insurance by the County Council covers all legal liability of the Council to young people on the visit but does not provide personal accident cover where the Council has no liability. In consequence additional personal accident cover is advisable/has been arranged (give full details).

A system of emergency contact has/will be arranged as follows (outline arrangements)

The code of conduct which your child will be required to follow is attached to this letter. Please discuss this with your child.

A meeting of all parents and participants will be held on (date) at (time) when clarification of any aspects of the visit will be available. In the meantime you are requested to complete and return the attached parental consent form.

Annexes

Annex 1	Health and Safety: Responsibilities and Powers
Annex 2	Leader competence and typical staff: young person ratios: General off-site visits
Annex 3	Activity leadership awards
Annex 4	Visit/activity pointers
Annex 5	National Governing Bodies and representative organisations
Annex 6	Useful contacts
Annex 7	Other guidance
Annex 8	Drug issues and educational visits
Annex 9	The Disability Discrimination Act and educational visits
Annex 10	Overseas expeditions organised through an independent provider
Annex 11	Foundation phase

Health and Safety: responsibilities and powers

Overview

This section seeks to clarify responsibilities under existing health and safety legislation. It explains who is responsible for the health and safety of school staff, pupils and others on school premises or when engaged on educational activities elsewhere including visits. It sets out related powers under education legislation and the key elements that a health and safety policy should include.

Status

Statutory

CONTENTS

Responsibility for Health & Safety in schools

- Health & Safety at Work Law
- Employer
- Employees
- Enforcement
- Responsibility – all schools

Community & voluntary controlled schools etc.

- Responsibility
- Monitoring and compliance
- Can an LA intervene in foundation or voluntary aided schools?
- Reserve power of entry
- Code of practice on Local Authority-school relations
- School funding arrangements

Foundation, voluntary aided and independent schools etc.

- Responsibility

- LA advice

List of other sources

Legislation referred to in this document

Key elements of a Health and Safety policy

Responsibility for Health and Safety in schools

Health and Safety at Work Law

- Health and safety responsibilities derive from the Health and Safety at Work etc. Act 1974 and associated regulations. Health and safety legislation is enforced by the Health and Safety Executive (HSE).

Employer

- The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer. Who this is varies with the type of school.
 1. For Local Authority maintained schools and educational establishments the employer is the Local Authority (LA).
 2. For voluntary aided and foundation schools the employer is the governing body.
 3. For independent schools, the employer is usually the governing body or proprietor.
- The Local Authority/LA is the employer for statutory youth groups. (Note: those in charge of non-statutory youth groups may also find this document useful.)
- Education employers have duties to ensure, so far as is reasonably practicable:
 4. the health, safety and welfare of teachers and other education staff;
 5. the health and safety of pupils in-school and on off-site visits; and
 6. the health and safety of visitors to schools, and volunteers involved in any school activity.

Employees

- Employees have responsibilities too. The Health and Safety at Work etc Act 1974 and the Management of Health and Safety at Work Regulations 1999 apply to them as well. Employees must
 7. take reasonable care of their own and others' health and safety;
 8. co-operate with their employers;

9. carry out activities in accordance with training and instructions; and
10. inform the employer of any serious risks.

Enforcement

- The HSE enforces health and safety law relating to the activities of LAs and schools.
- Because the employer is responsible for health and safety in the workplace and on work activities the HSE will normally take action against the employer. However, in some circumstances, for example where an employee failed to take notice of the employer's policy or directions in respect of health and safety, the HSE may take action against the employee as well or instead.

Responsibility – all schools

- The employer must have a health and safety policy and arrangements to implement it. The Health and Safety at Work etc Act 1974 applies. Key elements of a health and safety policy are listed in the Annex (note: this is not a comprehensive list).
- Employers must assess the risks of all activities, introduce measures to manage those risks, and tell their employees about the measures. The Management of Health and Safety at Work Regulations 1999 apply.
- In practice, employers may delegate specific health and safety tasks to individuals (LAs may delegate specific tasks to schools). **But the employer retains the ultimate responsibility no matter who carries out the tasks.** The employer should therefore maintain an audit track, making clear who is doing what and confirming that these tasks are being carried out.

Community and voluntary controlled schools etc.

Responsibility

- As the employer, the LA has responsibility for health and safety in community schools, community special schools, voluntary controlled schools, maintained nursery schools, pupil referral units and the statutory youth service. It has the power to ensure that its health and safety policy is carried out in-school and on all school activities.
- The LA must provide health and safety guidance to those schools and services where it is the employer. It must ensure that staff are trained in their health and safety responsibilities as employees and that those who are delegated health and safety tasks (such as risk assessment) are competent to carry them out. If an LA risk assessment shows that training is needed, the LA must make sure this takes place.
- The LA can direct schools to release staff for health and safety training where the scheme for financing schools contains such a provision. If it does not, LAs may wish to consider the need for an amendment to their scheme. If the scheme allows, the LA can charge the school for any training the LA has provided.
- It is good practice for community, community special and voluntary controlled schools etc. to draw up their own more detailed health and safety policies based upon their LA's general policy

Monitoring and compliance

- The LA cannot fulfil its statutory duty unless it monitors how its schools are complying with the LA policy. The LA should monitor this robustly to ensure required standards are reached and should take action where they are not.
- LAs' statutory school financing schemes can be expected to contain a number of provisions enabling the LA to ensure that schools have regard to health and safety requirements. Such schemes are made under section 48 of the School Standards and Framework Act 1998. They are commonly known as Fair Funding Schemes.
- Where an LA believes the health and safety of anyone on-site, or of anybody engaged on school activities off-site, is at risk it can make a direction to the governing body and Head teacher.
- A direction can specify action to be taken (e.g. remedy a health and safety failing). Or it can require the governing body and Head teacher to comply with a specific aspect of the LA's health and safety policy. Section 39(3) of the School Standards and Framework Act 1998 applies.
- In the event of non-compliance with a section 39 direction, the LA can apply to the Secretary of State for a direction. Section 497 (general default powers) or section 496 (power to prevent unreasonable exercise of functions) of the Education Act 1996 applies.
- Ultimately and rarely, compliance would be enforceable through the courts. Substantial or persistent non-compliance with scheme requirements is a ground for suspending delegation, subject to the governing body's right of appeal.

Can an LA intervene in foundation or voluntary aided schools?

- Under section 15(2)(iii) of the School Standards and Framework Act 1998 an LA may give a warning notice to any maintained school (community, community special, foundation, foundation special, voluntary aided or voluntary controlled) in its area where the safety (not the health) of staff or pupils is threatened by, for example, a breakdown in discipline.
- But the HSE and the Department for Education and Skills share a view that the intervention power in section 15, as set out above, is not normally an appropriate means of enforcing health and safety requirements in schools. This is subject to any ruling by the Courts.

Reserve power of entry

- LAs may need to obtain information in order to exercise any of their general responsibilities. They should normally be able to do this as employers or owners of school premises. Where they cannot reasonably do this, they may use their reserve right of entry to any school maintained by them. For health and safety purposes, this enables them to enter the premises of any community, community special or voluntary controlled school to obtain the information needed. Section 25 of the School Inspections Act 1996 applies.

Code of practice on Local Authority-School Relations

- This does not address LAs' duties as employers under the Health and Safety at Work etc Act 1974 and other relevant statutory duties. The guidance in the Code is not intended to override any of those duties.

School funding arrangements

- LAs' fair funding schemes should retain sufficient power to ensure they meet their health and safety responsibilities and that necessary work is carried out. The schemes should require governing bodies to:

11. supply all financial and other information to enable the LA to be sure that the school is

managing its budget satisfactorily;

12. have due regard to the LA's responsibilities for health and safety;

13. assess in advance where relevant the health and safety competence of contractors taking account of the LA's policies and procedures.

- Schools may take advice on health and safety from other bodies but must heed the policy of the LA.
- Schemes should allow the LA to pay for (and recoup the costs for) health and safety work for which it is liable where funds have been delegated to schools for such work but where the work was not done.
- Schemes should also allow the LA to recoup the costs of necessary health and safety training for staff from a school when funding for training is delegated but suitable training has not taken place.
- LAs can hold back funds to cover strategic management of health and safety i.e. establishing policies and setting standards, providing competence at a strategic level, carrying out active and reactive monitoring, reviewing the policies and standards, and advising schools.

Foundation, voluntary aided and independent schools etc.

Responsibility

- The governing bodies of foundation, foundation special and voluntary aided schools have similar responsibilities, as employers, to those set out above for LAs.
- In independent schools the employer may be a governing body or proprietor. The employer also has similar responsibilities.
- In some circumstances there may be staff employed by the LA working on the premises of foundation, foundation special or voluntary aided schools. The LA, as employer, has responsibility for their health and safety. The governing body also has responsibilities towards them, as visitors. See also next paragraph.
- Some foundation, foundation special, voluntary aided or independent schools may have links with the LA through such activities as the Duke of Edinburgh's Award. Or some of the staff in some of these schools may be employed by the LA. Where either of these apply, the school should refer to the section **Community and voluntary controlled schools etc.** above.

LA Advice

- Many LAs provide health and safety advice to foundation, foundation special, voluntary aided or independent schools. The Department encourages this. However, LAs are not responsible for the health and safety of pupils in these schools or of staff employed by these schools. This does not conflict with the LA's duties with regard to Asset Management Plans.

List of other sources

HSE Website www.hse.gov.uk

HSE Five Steps to Risk Assessment - <http://www.hse.gov.uk/pubns/indg163.pdf>

*HSE A Guide to Risk Assessment Requirements - <http://www.hse.gov.uk/pubns/indg218.pdf>
Health and Safety Commission (HSC) Managing health and safety in schools £5.95
HSC Health and safety guidance for school governors and members of school boards £5.95*

A Guide to the Law for School Governors (DfES 2001)- Community Version - Voluntary Aided Version - Voluntary Controlled Version- Foundation Version. website <http://www.dfes.gov.uk/governor/info.cfm>

DfES School Security website www.dfes.gov.uk/schoolsecurity

DfES Health and Safety of Pupils on Educational Visits: A Good Practice Guide http://www.dfes.gov.uk/h_s_ev/index.shtml

DfES/DH Supporting Pupils with Medical Needs: A Good Practice Guide <http://www.dfes.gov.uk/medical>

DfES Guidance on First Aid for Schools <http://www.dfes.gov.uk/firstaid>

DfES/Home Office School Security: Dealing with Troublemakers <http://www.dfes.gov.uk/schoolsecurity/dwthome.shtml>

DfES video "Can you see what they see?"

DfES Code of Practice on Local Education Authority-School Relations - <http://www.dfes.gov.uk/lea/>

Guidance on Standards for School Premises (ref DfEE 0029/2000).

DfES/CEDC Safe Keeping: A good practice guide for health and safety in study support (Ref DfEE 0197/2000)

HSE publications (priced and non-priced) are available from HSE Books Tel: 01787 881165
DfES guides are free from DfES publications Tel 0845 6022260
HSE's infoline is 08701 545500

Legislation referred to in this document

Health and Safety legislation

The Health and Safety at Work etc. Act 1974.

The Management of Health and Safety at Work Regulations 1999

Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 (RIDDOR)

Education legislation

Education (School Premises) Regulations 1999 (SI 1999 No.2)

School Standards and Framework Act 1998

School Inspections Act 1996.

Education Act 1996

Key elements of a Health and Safety Policy

- A general statement of policy
- Delegation of duties as allocated tasks
- Arrangements to put in place, monitor and review measures necessary to reach satisfactory health and safety standards
- Training of staff in health and safety including competence in risk assessment
- Off-site visits including school-led adventure activities
- Selecting and controlling contractors
- First aid and supporting pupils' medical needs
- School security
- Occupational health services and work-related stress
- Consultation arrangements with employees
- Workplace safety for teachers, pupils and visitors
- Violence to staff
- Manual handling
- Slips and trips
- On site vehicle movements
- Management of asbestos
- Control of hazardous substances
- Maintenance and when necessary examination and test of plant and equipment such as electrical equipment, local exhaust ventilation, pressure systems, gas appliances, lifting equipment and glazing safety.
- Recording and reporting accidents to staff, pupils and visitors - including those reportable under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 (RIDDOR).
- Fire safety, including testing of alarms and evacuation procedures
- Dealing with health and safety emergencies – procedures and contacts

ANNEX 2

Leader competence and typical staff: young person ratios

General off-site visits

1. Staff: young person ratio ranges given here are intended only as a starting point for visit leaders when planning their visit. They are not intended for professional outdoor activity providers. Actual ratios for any visit must be determined through a process of risk assessment by the visit leader or other competent staff. The Head/EVC should enquire if numbers fall significantly outside these ranges.
2. Competent leaders will recognise when the number of young people per leader should be reduced (e.g. if group members have particular behavioural or physical needs or if weather conditions are not favourable on the day) or, occasionally, when they can be safely increased. If the visit leader deems it safe to exceed the number of young people per leader given in the table below, this decision should be agreed with the Head/EVC.
3. Where leaders operate alone, the group should be trained/briefed in action to take in the event of leader incapacitation. An assistant leader, able to look after the group and raise the alarm, should be present if the group would be at significant risk were the leader incapacitated.

General off-site visits Leadership awards for specific adventure activities can be found in Annex 3 .			
Activity	Age of young people	Staff: young person ratios-typical range NB actual ratios must be determined by a process of risk assessment – see notes 1&2 above	Leader competence
Local visits and visits to normal countryside (as defined in Section P, table Pii)	Nursery	1: 2-4	Previous experience and approved by Head/EVC
	Reception / Year 0	1: 4-6	
	Years 1-3	1: 6-8	
	Years 4-6	1: 8-15	
	Year 7 onwards	1: 15-20	
	Special education	1: 6-10	
Residential visits and visits abroad	Years 4-6	1:8-10	As above
	Year 7 onwards	1: 10-15 (but 1:10 with 2 staff minimum for visits abroad)	

	Special education	1: 5-8 (but 2 staff minimum for visits abroad)	
Swimming in public pools (with lifeguard)	Years 1-3	1: 5-8	As above
	Years 4-6	1: 10-12	
	Year 7 onwards	1: 15-20	
Swimming elsewhere (without lifeguard)	All years	1: 5-10 (but 2 staff minimum)	As above & lifeguard qualification

4. In normal circumstances at least 50% of the adult numbers should be employees of the school/centre (eg teachers, youth leaders or learning support assistants). The balance of adult numbers will normally be made up of volunteers (parents, governors) approved by the Head/EVC.

5. Visit leaders should be aware that small parties with minimum staffing are vulnerable if staff are ill or have an accident during the visit. This eventuality needs consideration at the early planning stage, especially for extended visits or visits which require LA notification or approval.

6. Visit leaders should bear in mind that the longer a visit lasts, the more important it is to consider the need for additional staffing. The constant duty of care can be very demanding and coupled with other functions such as minibus driving may reduce the necessary degree of concentration and alertness.

7. Under some circumstances remote supervision of young people may be appropriate. Visit leaders should follow the guidance set out in Educational Visits [Section I1: Remote supervision](#).

Activity leadership awards

Adventure activities

1. Awards and qualifications are one (but not the only) way of demonstrating leadership competence in an activity. Competence is based on proven experience, demonstrated technical competence and group management skills but these can be measured in other ways e.g. through observation and approval by an appropriate technical adviser.
2. Staff: young person ratios for any visit must be determined through a process of risk assessment by the visit leader or other competent staff.
3. Where leaders operate alone, the group should be trained and briefed on action to take in the event of leader incapacitation. An assistant leader, able to look after the group and raise the alarm, should be present if the group would be at significant risk were the leader incapacitated.

National Governing Bodies and leadership awards – glossary of terms

CIC	Cave Instructor Certificate
LCMLA	Local Cave and Mine Leader Award
MIA	Mountain Instructor Award
MIC	Mountain Instructor Certificate
SPA	Single Pitch Award
ML	Mountain Leader Award
WGL	Walking Group Leader Award
IML	International Mountain Leader Award
BEL (BELA)	Level 2 Award in Basic Expedition Leadership (previously BELA)
BMG	British Mountain Guide
BHS	British Horse Society
ABRS	Association of British Riding schools
BCU	British Canoe Union
WCA	Welsh Canoe Association
RYA	Royal Yachting Association
SSS	Snowsport Scotland
SSW	Snowsport Wales
UKSS	UK Snowsports

ASCL	Alpine Ski Course Leader
BASI	British Association of Ski Instructors
SCO	Ski Course Organiser
WTRS	Welsh Trekking and Riding Society
TRSS	Trekking and Riding Society of Scotland

CANOEING AND KAYAKING

Please note that the coaching system is presently changing. This table will be updated as soon as the new qualifications have been introduced.

Hazard level/technical difficulty	Appropriate leadership awards Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	Minimum technical adviser qualifications
SEA		
Open sea/overfalls or tidal races/coasts with difficult or minimal landing	WCA/BCU Level 3 Coach with 5 star (Sea)	WCA/BCU Level 5 Coach (Sea)
Close inshore with easy landing and no overfalls/tidal races	Level 3 Coach (Sea)	Level 3 Coach with 5 star (Sea)
Sheltered tidal waters – minimal chance of being blown offshore	Level 2 Coach	As above
SURF		

Large surf (> 1 metre)	Level 3 Coach (Surf) with 5 star (Surf)	Level 5 Coach (Surf)
Surf (< 1 metre)	Level 3 Coach (Surf) or Level 3 Coach (Sea)	Level 3 Coach (Surf) with 5 star (surf)
LARGE BODIES OF INLAND OPEN WATER e.g. Lakes		
Journeys (kayaks) away from sheltered water/easy landing	Level 3 Coach	Level 3 Coach with 5 star
Journeys (open canoe) away from sheltered water/easy landing	Level 3 Coach (Canoe) with 5 star (Canoe)	Level 5 Canoe Coach
Sheltered areas with easy landing and minimal chance of being blown offshore	Level 2 Coach, trained for area	Level 3 Coach (Relevant Discipline)
RIVERS AND INLAND WATER		
Advanced White water (Grade 3 rapids and above)	Level 3 Coach with 5 star (Relevant discipline)	Level 5 Coach (Relevant discipline)
White water (Grade 2 rapids)	Level 3 Coach (Relevant discipline)	Level 3 Coach with 5 star (Relevant discipline)
Quiet canals, small lakes, suitable sections of slow moving rivers – Kayak	Level 2 Coach (Kayak)	Level 3 Coach (Relevant discipline)
Quiet canals, small lakes, suitable sections of slow moving rivers – Open Canoe	Level 2 Coach (any discipline)	Level 3 Coach (Open Canoe)

CAVING/MINING/UNDERGROUND EXPLORATION

Hazard level/technical difficulty	Appropriate leadership awards Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	Minimum technical adviser qualifications
Cave/mine systems with pitches of 18 m and over	Cave Instructor Certificate (CIC)	CIC
Cave/mine systems with several unavoidable pitches less than 18 m	Local Cave and Mine Leader Award (LCMLA) Level 2	CIC
Cave/mine systems with one unavoidable pitch less than 18m	Local Cave and Mine Leader Award (LCMLA) Level 2	CIC
Cave/mine systems with avoidable pitches less than 18m	Local Cave and Mine Leader Award (LCMLA) Level 2	CIC
Cave/mine systems with no pitches	LCMLA level 1	CIC
Show cave/tourist mines beyond public areas with lit paths	LCMLA level 1	CIC

CLIMBING AND ABSEILING

Hazard level/technical difficulty	Appropriate leadership awards Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	Minimum technical adviser qualifications
Winter climbing	Mountain Instructor Certificate (MIC) or British Mountain Guide (BMG) or Aspirant Guide	MIC or BMG
Multi-pitch rock climbing	Mountain Instructor Award (MIA)	MIC or BMG
Single pitch rock climbing and abseiling including commercial climbing walls	Single Pitch Award (SPA)	MIA
Commercial and school/centre climbing walls	Climbing Wall Award (CWA)	MIA
School/centre climbing walls and low-level traversing wall	Local training organised through the Outdoor Education Adviser	SPA

GORGE WALKING AND SEA CLIFF TRAVERSING (COASTEERING)

Important Note: Hazards associated with gorges and coastal areas vary enormously according to factors such as seriousness of terrain, escapability, predictability/rapidity of flooding/tidal changes/exposure to ocean swell. The same venue may present a different set of hazards on each visit according to water levels and swell conditions. A committing venue may appear to be benign in low water/small swell conditions but may change rapidly with weather changes. Floods/big swell may cause significant changes to the nature of the site. This highlights the importance of dynamic risk management. Assumptions should never be made that hazards at a venue will be as they were on any previous visit.

For this reason, attempting to categorise gorge and sea-cliff traversing venues is subjective and should be done in consultation with a suitably qualified technical adviser. For further advice contact the Outdoor Education Adviser.

Appropriate leadership awards

Note – competence can also be demonstrated by technical adviser approval (see [note 1, Annex 3](#))

There is no single, formal leadership award for this activity. Typically, these activities call on a combination of rock and water activity leadership skills. At one extreme the activity may involve no more than paddling up a stream bed or at a sheltered beach. On the other hand some of the more advanced venues would require the competence of an MIA holder. Site-specific induction and training is likely to be needed for the majority of venues.

Minimum technical adviser qualifications

Mountain Instructor Award (MIA) **plus** any of the following water based awards;

- lifesaving award
- whitewater rescue
- swift water rescue technician

plus site-specific induction by an experienced leader

HORSE/PONY TREKKING		
Hazard level/technical difficulty	Appropriate leadership awards	Minimum technical adviser qualifications
	Note – competence can also be demonstrated by technical adviser approval (see note 1 , Annex 3)	
Horse riding/pony trekking in terrain described in walking matrix	<p>The appropriate on-foot qualification and one of:</p> <p>BHS Tourism Qualification for Ride Leader</p> <p>ABRS Trek Leader Certificate</p> <p>WTRS Leader</p> <p>TRSS Leader</p>	As walking matrix and one of: Tourism Qualification for Centre Manager, or manager of a riding establishment licenced by the Local Authority

MOUNTAIN BIKING		
Important note: At the time of publication for this document, there are no single Nationally agreed leadership award for mountain biking. For advice on relevant qualifications and providers, contact your Outdoor Education Adviser.		
Hazard level/technical difficulty (routes with the characteristics listed below)	Appropriate leadership awards	Minimum technical adviser qualifications
	Note – competence can also be demonstrated by technical adviser approval (see note 1 , Annex 3)	
<p>Routes with considerable technical difficulty</p> <p>90-95% rideable over their total length</p> <p>In terrain more than 30 mins walk from the nearest shelter with communication</p> <p>Any height above sea level</p> <p>Normal summer conditions in daylight</p> <p>Multi-day trips where the group does not require to be self-sufficient</p>	<p>SMBLA Mountain Bike Leader award</p> <p>or</p> <p>another mountain biking leader qualification combined with either</p> <p>Mountain Leader or Walking Group Leader award</p>	SMBLA Mountain Bike Leader award tutor/assessor or MIA with another mountain bike leader award

<p>Routes with low to medium technical difficulty</p> <p>90-95% rideable over their total length</p> <p>In terrain no more than 30 mins walk away from shelter with communication</p> <p>Below 600 metres</p> <p>Normal summer conditions in daylight</p> <p>Multi-day trips where the group is not required to be self-sufficient</p>	<p>SMBLA Trail Cycle Leader award</p> <p>or</p> <p>another mountain bike leader qualification combined with Day Walk Leader Award</p>	<p>SMBLA Mountain Bike Leader award or another Mountain Biking leader's qualification combined with either</p> <p>Mountain Leader or Walking Group Leader award</p>
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ORIENTEERING

Hazard level/technical difficulty	Appropriate leadership awards	Minimum technical adviser qualifications
	Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	
Large forests/complex or high level terrain	BOF Level 3 coach	BOF Level 3 Coach Tutor
Forest or open country sites	BOF Level 2 coach	BOF Level 3 coach
Larger parks or small woods	BOF Level 1 Coach	BOF Level 2 Coach
School/centre sites and local parks	BOF Level 0 Coach (Teachers' course)	BOF Level 1 Coach
<p>Note: no qualification is required for orienteering within the school/centre grounds but it is good practice to attend an orienteering training course</p> <p>The holder of a Walking Group Leader (or higher) Award with recent and relevant orienteering experience may lead orienteering sessions up to the level of terrain within the remit of their award.</p>		

SAILING

Important note: The leader must be working under the direct supervision of a Senior Instructor. Both SI and leadership awards must be relevant to the craft used i.e. dinghy, keel or multi-hull

RYA guidelines provide further details on leadership awards and ratios – see:

www.rya.org.uk/WorkingWithUs/trainingcentres/resourcesfortrainingcentres.htm

Hazard level/technical difficulty	Appropriate leadership awards Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	Minimum technical adviser qualifications
Sea/tidal waters – coastal journeys	RYA Advanced Instructor Coastal	Senior Instructor Coastal and Advanced Instructor Award
Sea/tidal waters – within confines of harbour or suitable beach/bay.	Instructor Coastal	Senior Instructor Coastal
Inland waters	Instructor Inland	Senior Instructor Inland

SKIING AND SNOWBOARDING - OFF-PISTE

The leadership awards below relate to Nordic and Alpine skiing. Nordic and Alpine refer to particular ski disciplines, not to geographical settings.

Hazard level/technical difficulty	Appropriate leadership awards Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	Minimum technical adviser qualifications
Ski-mountaineering	British Mountain Guide (BMG) Carnet holder or International Equivalent	BMG Carnet holder
Alpine skiing and snowboarding and telemark skiing – Europe off-piste away from marked/serviced areas (back-country)	British Mountain Guide (BMG) Carnet holder or International Equivalent	As above
Alpine skiing and snowboarding and telemark skiing – Europe off-piste but within the recognised boundary of serviced areas shown on piste map	As above, or International Ski Teaching Diploma or Snowsport Wales/England Coach/Tutor when delivering ASCL training	International Ski Teaching Diploma /Senior Tutor - ASCL

Alpine skiing and snowboarding and Nordic skiing (langlauf) – UK off-piste	British Mountain Guide (BMG) Carnet holder or International Equivalent or Winter ML and one of: International Ski Instructors Award or BASI III relevant to discipline, or SSS Nordic Ski Leader, Snowsport Wales/England Coach of relevant discipline	International Ski Instructors Award or BASI III (Nordic Ski) or SSS Mountain Ski Leader or Winter ML who also holds Snowsport Wales/England Nordic Coach (Touring)
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SKIING AND SNOWBOARDING – ON PISTE

Hazard level/technical difficulty	Appropriate leadership awards Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	Minimum technical adviser qualifications
Piste skiing and snowboarding – <u>instruction</u>	International Ski Instructors Award or BASI III or Instructor approved by the Local Ski school at the resort for teaching/instructing skiing or snowboarding	International Ski Teaching Diploma holder/Trainer or head of local ski school
Leading Piste skiing and snowboarding – <u>no ski instruction</u>	Snowsport Wales/England Alpine Ski Course Leader Ski Party Leader Award, (Snowsport Scotland) (Permits limited teaching also in Scotland only)	Snowsport Wales/England Alpine Ski Course Leader Coach/tutor/assessor (NB. The SCO II has now been superseded by the ASCL. SCO II is effectively out of date) Snowsport Scotland Coach/tutor
Ski or snowboard trip organisation - <u>not skiing</u>	Snowsport Wales/England Snowsport Course Organiser (SCO) training: for at least one Party Leader	Snowsport Wales/England appointed SCO Coach/tutor
Artificial Slope Skiing or snowboarding – <u>instruction</u>	Level 1 or Level 2 UK Snowsports	UK Snowsports tutor or assessor, or ASSI tutor or assessor

Other	Various skiing/snowboarding qualifications from other countries exist	If any doubt occurs as to currency of qualifications please refer to the relevant UK governing body.
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WALKING		
Hazard level/technical difficulty	Appropriate leadership awards Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	Minimum technical adviser qualifications
Mountainous terrain – winter conditions (can include overnight)	Winter Mountain Leader (winter ML)	MIC
Mountainous terrain – not winter conditions (can include overnight)	Summer Mountain Leader (summer ML) or International Mountain Leader (IML)	MIA
Non-mountainous, hilly or moorland terrain – not winter conditions (can include overnight)	Walking Group Leader (WGL)	Winter ML
Lowland country – not winter conditions (can include overnight)	Level 2 Award in Basic Expedition Leadership	WGL or Summer ML

WINDSURFING		
Important note: leaders must be directly supervised by a Senior Instructor (windsurfing).		
Hazard level/technical difficulty	Appropriate leadership awards Note – competence can also be demonstrated by technical adviser approval (see note 1, Annex 3)	Minimum technical adviser qualifications
Sea/tidal waters	Start or Intermediate Instructor Coastal	Windsurfing Senior Instructor Coastal
Inland waters	Start Windsurfing Instructor Inland	Windsurfing Senior Instructor Inland

Visit / activity pointers

The visit/activity pointers in this section are not exhaustive but are provided as a starting point for schools/centres when developing their own pool of risk assessments/operating procedures for the visits/activities that they regularly provide.

Important note: It must be emphasised here that competent leadership, rather than written risk assessment, is the main determinant of quality and safety for any visit. Heads/EVCs are responsible for ensuring competent leadership for all educational visits and this is best done through a managed and on-going process of staff selection, induction, deployment, monitoring and further training and experience. See [Section D](#) for more on staff competence.

[All off-site visits](#)

[Camping](#)

[Canoeing and kayaking](#)

[Caving and mining](#)

[Climbing: Rock climbing and abseiling](#)

[Climbing: Climbing walls](#)

[Climbing: Winter climbing](#)

[D of E Expeditions](#)

[Exchange visits](#)

[Fieldwork](#)

[Fishing](#)

[Gorge walking/sea level traversing/coasteering](#) (combined water/rock activities)

[Horse riding and pony trekking](#)

[Ice-skating](#)

[Improvised rafting](#)

[Mountain biking](#)

[Orienteering: Off-site](#)

[Orienteering: On-site](#)

[Powerboating](#)

[Residential visits](#)

[Sailing \(Dinghy\)](#)

[Skiing and snowboarding \(on piste\)](#)

[Skiing and snowboarding \(dry slope\)](#)

[Sledging](#)

[Surfing and bodyboarding](#)

[Swimming in natural waters](#)

[Swimming pools without external lifeguard cover](#)

[Visits abroad](#)

[Walking: hill and mountain walking \(non-winter conditions\)](#)

[Walking: hill and mountain walking \(winter conditions\)](#)

[White water rafting](#)

[Windsurfing](#)

[Woodland activities/forest school](#)

N.B. Visit leaders can contact their Outdoor Education Adviser for further advice on any activity not included in the list.

ACTIVITY	ALL OFF-SITE VISITS Note: This page lists typical issues for all off-site visits. It is not exhaustive but is intended as a starting point for schools/centres when preparing risk assessments/operating procedure.
HAZARDS	<ul style="list-style-type: none"> ▪ Road traffic accidents ▪ Risks presented by individuals ▪ Terrain – trips, slips and falls ▪ Getting lost ▪ Weather extremes – wind, cold, sun or heat related conditions & injuries • Leader incapacitation • Accidents and emergencies • Child protection issues – unsuitable contact/abuse • 'Unplanned' entry into water, drowning
LEADER QUALIFICATIONS /COMPETENCE	<ul style="list-style-type: none"> • Previous experience of visit leadership appropriate to venue/activity/group and approved by Head/EVC • Appropriate level of first aid competence (if required) • Approved Minibus Driver (if required)
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by Head/EVC • Staff follow LA transport policy regarding hire/use of vehicles • Group briefed on road dangers and supervised to ensure safe practice • Young peoples' special medical or behavioural needs known to staff (including supervisory or instructional staff of any independent provider) • Group briefed on specific hazards of activity/venue • Appropriate personal protective clothing, footwear & equipment available to pupils and staff • Plan for pupils who do not take appropriate clothing – check before leaving or have spares • Leader(s) familiar with venue and able to find their way effectively • Regular head-counts carried out & condition of individuals monitored • Staff positioned in group to ensure effective supervision at all times (unless remote supervision) • Weather conditions and group ability/experience taken into account during venue/activity choice • Individuals encouraged to apply sun protection as necessary. Visit leaders may issue sun cream unless parent/carer consent has identified an allergy to sun cream for that young person. • Group briefed/trained in action to take if leader incapacitated, including summoning help • Competent assistant present if group will be at significant risk if leader incapacitated • Appropriate first aid cover (kit and first aider) provided for activity and venue • Emergency equipment appropriate to the environment, season and activity carried to keep group comfortable if forced to wait for any reason (e.g. group shelter for exposed locations with no shelter) • Parents informed and have given consent re activities taking place • Individuals carry any required medication and able to administer or staff able to administer • Method of summoning help available (e.g. mobile phone – but don't rely on these alone) • 24 hour emergency contacts & emergency procedures agreed in case of incident/late return • Group briefed on acceptable conduct & supervised to minimise risk of abuse • Staff follow establishment/LA child protection procedures <p>Where activity takes place near water, but there is negligible risk of falling in</p> <ul style="list-style-type: none"> • Visit planned to minimize risk from flooding, tide, ocean waves and strong currents • Careful choice of venue/activity to minimize risk of falling in • Group briefed on hazards/safe practice and carefully supervised to minimise risk of falling in <p>Where entry into water is planned or where there is a significant risk of falling in</p>	

- Venue chosen to minimize risk of drowning or being swept into danger
- Swimming ability of individuals known/taken into account when planning activity/venue
- Group briefed and supervised on safe practice when operating in or near water
- Staff appropriately competent and equipped to deal with any individual(s) in difficulty in water

ACTIVITY	<p>CAMPING</p> <p>Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.</p>
HAZARDS	<ul style="list-style-type: none"> • Fire - burns & scalds • Weather extremes – wind, cold, heat • Heavy loads – lifting injuries • Environmental damage by group – fires, pollution • Micro-organisms - sickness/hygiene related illness • Abuse/inappropriate contact with strangers
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by Head/EVC (and LA Outdoor Education Adviser if group will be camping in demanding environment as defined in Table Pii of this guidance) (if teacher, youth worker or similar is leading the activity) • • Appropriate supervision of cooking by member of staff • Group trained and supervised in correct use of stoves • Group briefed in danger of fire near tents and safe storage and packing of fuel • Fuel bottles/spares kept well away from lit stoves • Group trained to check stoves are unlit and cool prior to re-fuelling • Staff consider keeping matches/lighters depending on group maturity/previous experience • Liquid fuel bottles (eg Trangia fuel) must be fitted with non-return valves • Gas canisters must have self-sealing valves • Adequate separation between tents to reduce chance of fire spreading from tent to tent • Running and ball games prohibited close to lit stoves • First aid kit includes burns dressings • Method to extinguish fire readily available and known to group • Serviceable tents, sleeping bags and ground insulation • Group trained in tent erection if intending to camp in exposed/wild area • Careful selection of campsite taking into consideration other users, likelihood of flooding, prevailing and forecast wind • Rucksacks packed to ensure individuals can cope with weight and individuals trained in good lifting technique • Cooking area chosen to reduce risk of starting wild fire • Open fires not permitted unless in dedicated fire pit or similar • Group briefed about danger of illness and trained in camp hygiene • Group briefed on methods to sterilize water or sources of clean natural drinking water • Group trained in environmentally sound washing and toilet procedures • Group clean area prior to leaving to ensure minimum environmental impact • Venue and timing of visit chosen to minimize risk of inappropriate contact with strangers 	

ACTIVITY	<p>CANOEING & KAYAKING</p> <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits • The Welsh Canoeing Association is the National Governing Body for canoeing and kayaking. Their website is an important source of information for those leading this activity www.welsh-canoeing.org.uk
HAZARDS	<ul style="list-style-type: none"> • Drowning • Lifting injuries • Shoreline/banks - slips, trips, falls and cuts • Hypothermia • Drifting offshore • Impact injuries – paddles/rocks etc • Sports injuries • Open canoes - swamping • Water borne pollution and diseases
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Buoyancy aids worn by all participants • Manufacturer's recommendations followed with regard to care, testing and lifespan for buoyancy aids and helmets • Water confidence of individuals known/taken into account when planning activity/venue • Throwlines carried and leader trained in use for white water trips • Participants briefed and supervised in safe lifting technique • Suitable footwear worn by all group members to minimize risk of slips, trips, falls and cuts. • Route on shore chosen to minimise risk of slips, trips, falls and cuts • Group appropriately equipped and clothed for venue/activity/water and air temperature • Emergency equipment carried, including method to re-warm individuals if appropriate • Consideration of actual and forecast wind and tidal flow to minimise risk of drifting offshore or into hazards • Helmets worn for all sessions with risk of collisions with others or fixed objects • Warm-up before session recommended • Open canoes fitted with sufficient buoyancy to prevent sinking if swamping occurs • Any canoe towing or sailing system must have quick release to allow rapid abandonment if swamping likely • WCA/Environment agency or other local knowledge consulted re pollution and environmental issues prior to site use • Hands cleaned prior to eating if water quality suspect 	
NOTES	
<ul style="list-style-type: none"> • Local access agreements must be adhered to • Rafted open canoes can provide a stable platform for initial paddling sessions or to cater for young people with particular needs. Capsizes of rafted open boats are unlikely except in large or breaking waves or if loaded unusually on one side. If capsize does occur, rafts can present more problems in righting and emptying than un-rafted boats. Leaders using rafted open canoes should therefore be practised in how to deal with raft capsize. 	

ACTIVITY	<p>CAVING & MINING</p> <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits • The British Caving Association is the National Governing Body for caving and mining. Their website is an important source of information for those leading this activity www.british-caving.org.uk
HAZARDS	<ul style="list-style-type: none"> ▪ Falling objects – impact injuries ▪ Hazardous water – drowning/impact injuries ▪ Water borne diseases and pollution ▪ Cold water and conditions - hypothermia ▪ Terrain – trips, slips and falls ▪ Equipment failure ▪ Gas – suffocation/long term illness ▪ Light failure – getting lost/injuries
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Helmets worn by all participants • Group briefed re care with loose rock and equipment at pitch heads • Route chosen to minimize risk of loose rock/stone fall • Special care in old mineral mines re false floors, stopes, props etc • Likelihood and severity of flooding in cave/mine known • Detailed current and forecast conditions taken into account during venue/activity choice • Downstream/underwater hazards/currents assessed prior to entry into water • Swimming ability of individuals known/taken into account when planning activity/venue • Activity structured to allow effective and appropriate supervision at all times • Staff appropriately trained and equipped to deal with any individual(s) in difficulty • Buoyancy aids worn for trips where a fall/jump into deep water is likely • Method of escape/safe areas identified prior to visit, including evacuation of casualty • BCA or environment agency or local expertise consulted re pollution and environmental issues prior to site use • Hands cleaned prior to eating • Entry into water minimized or avoided in cold conditions • Rope/spotting used as appropriate to protect against falls • Judicious belay selection for any ropework • Only establishment-owned personal protective equipment (PPE) to be used. • All PPE checked regularly (checks recorded) for wear and tear – damaged or suspect equipment taken out of use immediately • Manufacturer's guidelines followed with regard to life span of PPE • Spare lighting carried in case of light failure • In-situ anchors treated with caution – backed up/equalised where possible • Leader to carry out visual and physical checks of in-situ anchor prior to use • British Caving Association contacted to assess gas/radon issues • Limited exposure in high radon areas to ensure safe levels are not exceeded 	

ACTIVITY	<p>CLIMBING & ABSEILING</p> <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits • Mountain Leader Training Wales is the National Governing Body for climbing and walking. Their website is an important source of information for those leading this activity www.mltw.org
HAZARDS	<ul style="list-style-type: none"> ▪ Unsupervised climbing – fall injuries ▪ Terrain – slips, trips and falls ▪ Sports injuries ▪ Equipment failure ▪ Hair/clothing trapped in abseil or belay device ▪ Bouldering – fall injuries ▪ Incorrect belay technique or use of belay device – injuries from falling • Rock fall/falling objects – injuries
SAFETY MEASURES	
<ul style="list-style-type: none"> ▪ Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) ▪ Maintain appropriate supervision of individuals at all times ▪ Route to crag/descent from top chosen to minimize risk of falling/knocking off rocks ▪ Warm up before climbing. ▪ Rings and 'dangly' jewellery should be removed or safely covered to avoid snagging. ▪ Only establishment-owned personal protective equipment (PPE) to be used. ▪ All PPE checked regularly (checks recorded) for wear and tear – damaged or suspect equipment taken out of use immediately ▪ Manufacturer's guidelines followed with regard to life span of PPE ▪ In-situ anchors treated with caution unless full history is known – backed up and equalised wherever possible ▪ Leader to carry out visual and physical checks of in-situ anchor prior to use ▪ Long hair tied back and loose clothing tucked in ▪ Releasable abseil set-up with separate safety rope for participant when working with novices ▪ Auto-locking system used if abseiling without separate safety rope (e.g. 'dead-man's hand') ▪ Young people briefed and supervised in spotting each other during bouldering ▪ Careful selection of bouldering/traversing area to ensure good landing ▪ Young people stay within agreed boundaries, including height limit, when bouldering ▪ Young people briefed on how to jump off safely ▪ Pupils briefed on correct use of harness, karabiners, belay devices and knots ▪ Belayers trained to keep close to base of cliff, backed up if belaying heavier climber ▪ Staff supervise at all times to ensure safe belaying and climbing ▪ All participants wear helmets ▪ Individuals briefed to test holds before pulling on them and warn others if they drop anything ▪ Group briefed on hazard of throwing stones and supervised to ensure compliance ▪ Where possible, non-participants should not wait directly under the crag or base of abseil 	
NOTES	
<ul style="list-style-type: none"> • Serious accidents and fatalities have occurred as a result of accidentally clipping main climbing rope into gear loops sewn on harnesses. 	

<ul style="list-style-type: none"> No belay device can be considered fullproof (including 'self-locking' devices). Careful supervision of young people belaying is essential. 	
ACTIVITY	<p>CLIMBING WALLS</p> <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. Leadership awards for this activity are detailed in Annex 3, Educational Visits Mountain Leader Training Wales is the National Governing Body for climbing and walking. Their website is an important source of information for those leading this activity www.mltw.org
HAZARDS	<ul style="list-style-type: none"> Unsupervised climbing – fall injuries Sports injuries Equipment failure Hair/clothing trapped in abseil or belay device Bouldering – fall injuries Incorrect belay technique or use of belay device – injuries from falling
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) Maintain appropriate supervision of individuals at all times Warm up before climbing Rings and 'dangly' jewellery removed or safely covered to avoid snagging Only establishment-owned personal protective equipment (PPE) to be used All PPE checked regularly (checks recorded) for wear and tear – damaged or suspect equipment taken out of use immediately Manufacturer's guidelines followed with regard to life span of PPE Long hair tied back and loose clothing tucked in Young people briefed and supervised in spotting each other during bouldering Young people stay within agreed boundaries, including height limit, when bouldering Young people briefed on how to jump off safely Pupils briefed on correct use of harness, karabiners, belay devices and knots Belayers trained to keep close to base of wall, backed up if belaying heavier climber Staff supervise at all times to ensure safe belaying and climbing All participants wear helmets 	
NOTES	
<ul style="list-style-type: none"> Serious accidents and fatalities have occurred as a result of accidentally clipping main climbing rope into gear loops sewn on harnesses. No belay device can be considered fullproof (including 'self-locking' devices). Careful supervision of young people belaying is essential. 	

ACTIVITY	<p>WINTER CLIMBING</p> <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits • Mountain Leader Training Wales is the National Governing Body for climbing and walking. Their website is an important source of information for those leading this activity www.mltw.org
HAZARDS	<ul style="list-style-type: none"> ▪ Slips, trips and falls ▪ Equipment or belay failure ▪ Cold related injuries • Avalanches • Snow blindness • Benightment
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Group equipped and trained in the use of ice axe and crampons • Helmets worn by all participants when climbing or at the base of a climb • Detailed weather forecast, weather history and avalanche report obtained if possible and considered when choosing suitable activity/venue • Leader(s) competent in identifying and avoiding (where possible) likely avalanche-prone slopes <ul style="list-style-type: none"> ▪ Only establishment-owned personal protective equipment (PPE) to be used. ▪ All PPE checked regularly (checks recorded) for wear and tear – damaged or suspect equipment taken out of use immediately ▪ Manufacturer's guidelines followed with regard to life span of PPE ▪ In-situ anchors treated with caution unless full history is known – backed up and equalised wherever possible • Leader to carry out visual and physical checks of in-situ anchor prior to use • Appropriate protective clothing • Ski goggles or similar eye protection • Torches carried to allow group to get off the hill after dark • Careful consideration of route/activity to minimise risk of unplanned benightment • Appropriate equipment carried to allow whole group to shelter overnight in emergency • Group trained in bivvy techniques if planned 	

ACTIVITY	<p>D OF E EXPEDITIONS</p> <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Road traffic accidents • Fire - burns & scalds • Remote supervision – getting lost/emergencies • Weather - hypothermia/hyperthermia • Slips, trips and falls • Heavy loads – lifting injuries • Environmental damage by group – fires, pollution • Micro-organisms - sickness/hygiene related illness • Abuse/inappropriate contact with strangers
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by Head/EVC (and LA Outdoor Education Adviser if expedition will take place in demanding environment as defined in Table Pii or involves an adventure activity as defined in Table Piii of this guidance) (if teacher, youth worker or similar is leading the activity) • Route chosen to minimise road sections. High visibility jackets if travelling along road sections • Group trained and supervised in correct use of stoves • Group briefed in danger of fire near tents and safe storage and packing of fuel • Fuel kept well away from lit stoves • Group trained to check stoves are unlit and cool prior to re-fuelling • Staff consider keeping matches/lighters depending on group maturity/previous experience • Liquid fuel bottles (eg Trangia fuel) must be fitted with non-return valves • Gas canisters must have self-sealing valves • Adequate separation between tents (>3m if possible) • Running and ball games prohibited in the vicinity of stoves and tents • First aid kit includes burns dressings • Method to extinguish fire readily available and known to group • Young people sufficiently mature, trained and experienced to cope with remote supervision/planned activity • Group and venue well known to leader(s) • Group briefed on boundaries, meeting points/times and how to contact leaders if lost • Group appropriately equipped and trained to deal with emergencies, including summoning help (not relying entirely on mobile phones). • Regular head-counts carried out at agreed check points • Serviceable tents, sleeping bags and ground insulation • Group trained in tent erection if intending to camp in exposed/wild area • Careful selection of campsite taking into consideration other users, flooding, forecast and current wind • Rucksacks packed to ensure individuals can cope with weight. Individuals trained in lifting technique • Cooking area chosen to reduce risk of starting wild fire • Open fires not permitted unless in dedicated fire pit or similar • Group briefed about danger of illness and trained in camp hygiene • Group briefed on methods to sterilize water or sources of clean natural drinking water • Group trained in environmentally sound washing and toilet procedures • Group clean area prior to leaving to ensure minimum environmental impact 	

<ul style="list-style-type: none"> • Venue and timing of visit chosen to minimize risk of inappropriate contact with strangers
NOTES
<ul style="list-style-type: none"> • Visit leaders should also incorporate risks associated with the chosen mode of journeying e.g. walking, cycling or canoeing detailed elsewhere in Annex 4.

ACTIVITY	EXCHANGE VISITS <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Risks associated with host country e.g. natural disaster/war/terrorist threat/health issues • Poor communication with host family re individual needs - medical needs not met • Road traffic abroad – accidents • Family activities – accidents • Remote supervision – getting lost/emergencies • Child protection issues – unsuitable contact/abuse

SAFETY MEASURES

- Leader approved by Head/EVC
- Advice from Foreign and Commonwealth Office web site considered prior to host country choice and prior to visit
- Full consideration of medical and health issues, including appropriate vaccinations, medical insurance, European Health Insurance Cards etc
- Careful matching of individuals to host families
- Host family informed re relevant medical information and special needs
- Specialist medical care in place as required
- Briefing about differences in road traffic and driving standards eg: look left first!
- Particular care with UK coaches abroad (e.g. exit doors opening into the traffic)
- Prior agreement about who exactly may and who may not drive young people around
- Briefing as to acceptable and unacceptable activities on family days
- Pupils sufficiently mature to cope with exchange
- Group briefed on boundaries, meeting points/times and method to contact leaders if required
- Regular check up on individuals carried out by visit leader(s)
- Bilingual 'Help cards' carried by young people with contact names, numbers and key phrases etc.
- Code of Conduct and expectations shared with all parties
- Random visits to host families by visit leader during exchange visit
- CRB or similar assurances that host families are suitable
- Sleeping arrangements are confirmed and privacy provided for showering/toilets etc
- Young people use 'keywords' to alert staff to problems e.g. code words that mean 'Help!' or 'Visit me!'

NOTES

Visit leaders should ensure that LA guidance on exchange visits in [Section N of Educational Visits](#) is considered in the planning and organization of any exchange visit.

ACTIVITY	FIELDWORK <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended
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	as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Proximity to water – drowning ▪ Rise in water levels, rivers or incoming tides - drowning ▪ Slips, trips and falls ▪ Hypothermia/hyperthermia ▪ Falling objects • Water borne diseases/pollution • Injuries from equipment e.g. ranging poles, geology hammers • Environmental damage by groups
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by Head/EVC (and LA Outdoor Education Adviser if fieldwork will take place in demanding environment as defined in Table Pii or involves an adventure activity as defined in Table Piii of this guidance) • Detailed weather forecast including tide times for coastal locations • Careful site choice for river studies taking into account forecast and recent rainfall • Appropriate protective clothing and footwear worn for the venue/weather/activity • Be prepared to change planned activity in adverse conditions • Helmets for participants operating at base of cliffs (e.g. geology trips) • Young people briefed and supervised re safe use of equipment • Eye protection if using geology hammers • WCA/Environment agency consulted re pollution and environmental issues prior to site use • Hands washed in clean water prior to eating if water quality suspect • Avoid damage to environment (eg soil pits, collection of samples etc.), particularly in sensitive areas e.g. SSSIs, nature reserves 	
NOTES	
<p>A number of recent accidents and fatalities have reflected an underestimation of the power of water, even when shallow, and the effect of sudden immersion. River study sites should be carefully chosen beforehand and not used if water levels rise in a short period of time or beyond a safe level. Visit leaders should have good knowledge of the site and the likelihood and severity of flooding.</p>	

ACTIVITY	FISHING Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Drowning, • Slips, trips and falls • Hook injuries • Water borne disease or pollution • Electric shock
QUALIFICATIONS	Suitable transferable qualification e.g. lifesaving or water rescue award unless rescue cover provided at venue
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by Head/EVC • Detailed weather forecast • Careful choice of venue to reflect conditions and group experience • Continuous supervision of group • Young people briefed on approach to and from the bank • Appropriate protective clothing worn for weather conditions • Buoyancy aids worn if fishing in river (and considered if close to deep water with risk of falling in) • Suitable footwear worn by all group members to minimize risk of slips, trips and falls. • Route on shore chosen to minimise risk of slips, trips and falls • Equipment used by beginners under constant supervision, young people instructed in correct use • Warn about 'back cast' and arrange group to minimise risk • Water confidence of individuals known/taken into account when planning activity/venue • Defined and agreed fishing area • Emergency equipment carried, including method to re-warm individuals if appropriate • Effective safety cover provided – able to deal with someone falling in • Effective means to communicate with group and attract their immediate attention if required • Checks made re pollution and environmental issues prior to site use • Hands cleaned prior to eating if water quality suspect • Venue chosen away from any overhead power lines 	

ACTIVITY	<p>GORGE WALKING/SEA LEVEL TRAVERSING/COASTEERING</p> <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. Leadership awards for this activity are detailed in Annex 3, Educational Visits
HAZARDS	<ul style="list-style-type: none"> Wet rock and vegetation/soil – trips, slips and falls Deep and/or fast flowing water – drowning, impact injuries, hypothermia Belay or equipment failure Stone fall Water borne diseases and pollution Environmental damage to fragile plant communities (gorges)/bank erosion
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) Rope/spotting used as appropriate to prevent a slip becoming a serious fall Likelihood, cause and severity of flooding/ocean swell known by leader(s) Detailed current and forecast conditions/tidal information taken into account during venue choice to minimize risk from flooding, tide, ocean waves and strong currents. Method of escape/safe areas identified prior to visit, including evacuation of casualty Depth of water and underwater obstructions checked prior to jumping/sliding into pools Downstream hazards checked prior to entering water Method to prevent young people being swept into danger used Water confidence of individuals known/taken into account when planning activity/venue Buoyancy aids worn for all trips where a fall/jump into deep water is possible In-situ anchors treated with caution unless full history is known Only establishment-owned personal protective equipment (PPE) to be used. All PPE checked regularly (checks recorded) for wear and tear – damaged or suspect equipment taken out of use immediately Manufacturer's guidelines followed with regard to life span of PPE Appropriate protective/insulating clothing worn for venue/activity/time of year/temperature of air and water Climbing helmets worn by all participants Checks carried out re pollution and environmental issues prior to site use Hands washed in clean water prior to eating if water quality suspect Gorge and route chosen to minimise soil erosion and impact on plant communities 	
NOTES	
<p>Hazards associated with gorges and coastal areas vary enormously according to factors such as seriousness of terrain, escapability, predictability/rapidity of flooding/tidal changes/exposure to ocean swell.</p> <p>The same venue may present a different set of hazards on each visit according to water levels and swell conditions. A serious venue may appear to be benign in low water/small swell conditions but may change rapidly with weather changes. Floods/big swell may cause significant changes to the nature of the site. This highlights the importance of dynamic risk management. Assumptions should never be made that hazards at a venue (e.g. underwater obstructions) will be as they were on any previous visit.</p>	

ACTIVITY	HORSE RIDING AND PONY TREKKING <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. Leadership awards for this activity are detailed in Annex 3, Educational Visits
HAZARDS	<ul style="list-style-type: none"> Falls Traffic Horses – bites/kicks Hygiene
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by LA Outdoor Education Adviser and Head/EVC (or AALS licence holder if riding in Licensable terrain) (if teacher, youth worker or similar is leading the activity) All participants wear helmets. Appropriate protective clothing worn Approved BHS provider, a member of Association of British Riding Schools Group briefed on safety measures including danger of horses and methods to minimise risk or bites/kicks Appropriate supervision of group by riding school staff and school/centre staff Individuals clean hands prior to eating Change or clean footwear and wash hands before leaving site 	
NOTES	
<ul style="list-style-type: none"> This activity comes under the AALS regulations if it takes place in 'remote country' The provider should be registered with and inspected by the Environmental Health Officer of the local council. 	

ACTIVITY	ICE SKATING <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> Falls, collisions Cold related injuries Sports injuries Injuries from skates – twisted ankle/cut fingers
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by Head/EVC Activity managed to reduce risk of collision with others – all skate in one direction Participants wear mittens or gloves and long sleeved clothing Appropriate clothing for temperature and to protect against fall onto ice Before commencement of the session, it is recommended that pupils should 'warm up' Follow local ice rink rules Brief young people in how to walk in skates and basic skating technique including what to do if fall over Avoid skating in chains/trains 	

ACTIVITY	IMPROVISED RAFTING <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> Drowning, Capsizes, entrapment/raft disintegration Lifting injuries Head injuries Slips, trips and falls Hypothermia Drifting offshore into hazardous areas Collision with fixed objects Water borne disease or pollution
QUALIFICATIONS	Suitable transferable qualification e.g. RYA Powerboat Level 2 or relevant kayak/canoe coach plus lifesaving or water rescue award
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by LA Outdoor Education Adviser and Head/EVC Detailed weather forecast Careful choice of venue to reflect conditions, availability and nature of safety cover and group experience – small body of water free of strong currents and unusual hazards is ideal Raft-building materials appropriate for the age/ability of group and activity: strong but light spars, free of splinters/sharp projections. Rope or string short enough to avoid ensnaring potential or camstraps used. Paddles used must have handles in place. Plastic barrels used (as opposed to metal) where possible – thoroughly cleaned of any chemicals etc. prior to first use and with enough bouyancy for the group/route (50 gallon drums are the norm) Appropriate protective clothing worn for weather conditions and water/air temperature Buoyancy aids worn while rafting (including during raft construction if working close to deep water) Suitable footwear worn by all group members to minimize risk of slips, trips, falls and cuts. Route on shore chosen to minimise risk of slips, trips, falls and cuts Canoe helmets worn Manufacturer's recommendations followed with regard to care, testing and lifespan for buoyancy aids and helmets Water confidence of individuals known/taken into account when planning activity/venue Defined and agreed rafting area Emergency equipment carried, including knife, first aid kit, throwline or other reaching system and a method to re-warm individuals if appropriate Effective safety cover provided – able to deal with 'all-in' scenario. A safety boat may be required in some situations – determined through risk assessment process – but safety boat must be fit for purpose. Appropriate access to shelter and dry clothing for participants Effective means to communicate with group and attract their immediate attention if required Checks made re pollution and environmental issues prior to site use Hands cleaned prior to eating if water quality suspect 	
NOTES	
<p>Participants may get over enthusiastic or 'carried away' whilst rafting. It is important to agree with the group an effective method to get immediate attention of all participants should a problem occur.</p>	

ACTIVITY	<p>MOUNTAIN BIKING</p> <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits
HAZARDS	<ul style="list-style-type: none"> ▪ Road traffic accidents – hit by vehicle ▪ Trail hazards and other trail users – falls or collisions ▪ Equipment failure – crash injuries or long walk back ▪ Gale force winds – blown off bike/off route ▪ Forestry operations – hit by vehicle or tree ▪ Environmental damage – erosion
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Route chosen to minimize road sections • Adequate bike lights/reflective jackets if cycling in low light conditions on roads/trails used by vehicles • Venue and route chosen according to weather conditions and group ability/aims • Initial practical skills test carried out prior to ride to establish ability level of individuals • Group control methods shared with all participants before departure • Leader sets pace of group – particularly on downhill sections • Group briefed to expect the unexpected – eyes open and look ahead! • All group members wear correctly fitting, approved cycling helmet and gloves • Avoid exposed areas during very high winds • Bike check and group skills check prior to ride • Leader trained in basic repairs and carrying appropriate spares/repair kit • Group briefed to maintain safe distance from other bikers • Avoid areas where forestry operations are taking place • Follow the Country Code and Mountain Biking Code and ride only on legal trails. • Avoid areas prone to soil erosion in wet weather – purpose built or hardpack surface ideal 	
NOTES	
<ul style="list-style-type: none"> • Never assume that an individual who can ride a bike on a road can ride off-road safely – they will need time to adjust and develop the skills to handle rougher terrain. • There are a number of purpose-built mountain bike trails in a number of forest areas in Wales – locations from www.mbwales.co.uk 	

ACTIVITY	<p>OFF-SITE ORIENTEERING</p> <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits • The British Orienteering Federation is the National Governing Body for orienteering. Their website is an important source of information for those leading this activity www.britishorienteering.org.uk
HAZARDS	<ul style="list-style-type: none"> ▪ Terrain - Slips, trips and falls ▪ Vegetation - cuts, scratches, abrasions • Remote supervision - getting lost/emergencies • Sports injuries • Falling trees • Forestry vehicles – run over
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Appropriate footwear for terrain • Appropriate protective clothing, long trousers and long sleeves for forest 'Orienteering' • Pupils warned of danger to eyes from low branches • Group and venue well known to leader(s) • Group briefed on boundaries, meeting points/times and method to contact leaders • Group appropriately equipped and trained to deal with emergencies or quickly able to summon help • Course suitable for skill level/maturity and experience of pupils • Regular head-counts carried out • Distinctive sound signal for 'return to base' • Participants have whistles (or similar), watches, and return to base times • Warm-up before event • Avoid exposed forest areas in very high winds • Avoid courses where pupils could stray into areas where forestry activity is taking place 	
NOTES	
<p>The Welsh Orienteering Association organise open orienteering events throughout Wales and can give advice on local mapped areas – check their website www.woa.org.uk</p>	

ACTIVITY	ON-SITE ORIENTEERING <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. Leadership awards for this activity are detailed in Annex 3, Educational Visits The British Orienteering Federation is the National Governing Body for orienteering. Their website is an important source of information for those leading this activity www.britishorienteering.org.uk
HAZARDS	<ul style="list-style-type: none"> Terrain - Slips, trips and falls Vegetation - cuts, scratches, abrasions Remote supervision - emergencies Sports injuries
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by Head/EVC Appropriate footwear worn for terrain Appropriate protective clothing, long trousers and long sleeves worn if required Pupils warned of danger to eyes from low branches Group and venue well known to leader(s) Group briefed on boundaries and method to summon help Course suitable for skill level/maturity and experience of pupils Regular head-counts carried out Distinctive sound signal for 'return to base' Warm-up before event 	

ACTIVITY	POWERBOATING <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> Drowning Capsizes, entrapment Lifting injuries Engine & propeller injuries Slips, trips and falls Hypothermia Engine failure Drifting offshore Sudden changes in weather and water conditions Collision with fixed objects Trailer accidents
QUALIFICATIONS	RYA Powerboat Level 2
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) Detailed weather forecast Buoyancy aids/lifejackets as appropriate 	

- Regular servicing and safety checks
- Cut engine on approach to swimmers
- Flare pack and emergency kit in waterproof container if used on open water/sea
- Spare means of propelling the boat
- Appropriate protective clothing
- Killcords used every time engine is started
- Effective method of communication with shore and with fleet
- Ensure seaworthiness of craft
- Do not exceed maximum load of craft

ACTIVITY	RESIDENTIAL VISITS <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Fire • Alcohol/drug abuse • Balconies / opening windows • Child protection issues – unsuitable contact/abuse
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by Head/EVC • Adequate fire detection, alarm and evacuation systems in place • Fire drill practice carried out for whole group on arrival/before first night • Rules re smoking and naked flames in rooms understood by all group members • Young people, staff and parents/carers aware that drugs/alcohol not permitted • Young people/parents/carers understand sanctions if alcohol/drug rules are broken • Accommodation selected without balconies or group briefed and supervised re dangers of balconies / opening windows • Accommodation and timing of visit chosen to minimize stranger danger 	

ACTIVITY	SAILING (DINGHY) <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits • The Welsh Yachting Association is the National Governing Body for sailing and windsurfing. Their website is an important source of information for those leading this activity www.thewya.org.uk
HAZARDS	<ul style="list-style-type: none"> • Drowning, • Capsizes, entrapment • Lifting injuries • Head injuries (especially from booms) • Slips, trips and falls • Hypothermia • Drifting offshore • Collision with fixed objects

	<ul style="list-style-type: none"> • Trapped fingers (winches, etc) • Ropeburns • Sports injuries • Water borne pollution and diseases
SAFETY MEASURES	
	<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Senior Instructor present and overseeing all activities • Buoyancy aids/lifejackets worn by participants as appropriate • Water confidence of individuals known/taken into account when planning activity/venue • Manufacturer's recommendations followed with regard to care, testing and lifespan for buoyancy aids and helmets • Warm-up before session recommended • Immediate headcount following capsize • Participants briefed and supervised in safe lifting technique • Helmets recommended for single handed crafts with risk of collisions with boom (e.g. Toppers, Lasers) • All craft have suitable buoyancy • Suitable footwear worn by all group members to minimize risk of slips, trips and falls • Route on shore chosen to minimise risk of slips, trips, falls and cuts • Group appropriately equipped and clothed for venue/activity/water and air temperature • Emergency equipment carried, including method to re-warm individuals if appropriate • Consideration of actual and forecast wind and tidal flow to minimise risk of drifting offshore/into dangerous water/hazards • Defined and agreed sailing area • Effective fleet communication • Appropriate safety boat in attendance with appropriately qualified operator – meets RYA recommendations • Checks made re pollution and environmental issues prior to site use • Hands cleaned prior to eating if water quality suspect • Individuals trained in operation of tackle to minimise risk of injury/rope burn

ACTIVITY	SKIING/SNOWBOARDING (ON PISTE) <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits • The Snowsport Wales website provides useful information for those involved in organisation and leadership of skiing www.snowsportwales.net
HAZARDS	<ul style="list-style-type: none"> ▪ Falls, collisions ▪ Snow blindness ▪ Cold related injuries ▪ Sports injuries ▪ Effects of altitude ▪ Avalanches ▪ Accommodation – fire ▪ Alcohol/drug abuse ▪ Accommodation – balconies ▪ Child protection issues – unsuitable contact/abuse

SAFETY MEASURES

- Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity)
- Appropriate runs/area of slope used according to ability of young people
- Appropriate level of supervision for ability/maturity of group
- Young people should be made familiar with the 'Skiway Code' or similar code of conduct
- Only qualified individuals to adjust bindings
- The use of mittens or gloves, long sleeved protective clothing and eye protection is essential.
- Before commencement of the session, it is recommended that pupils should 'warm up'
- Height of resort/upper slopes and potential for altitude problems carefully considered in choice of venue
- Gradual acclimatization over period of days if required
- Ensure adequate fluid intake
- Any individual showing signs of altitude problems to descend immediately and medical advice sought
- Group ski within piste area and follow any advice/requirements at resort re areas to avoid
- Adequate fire detection, alarm and evacuation systems in place
- Fire drill practice carried out for whole group on arrival
- Rules re smoking and naked flames in rooms understood by all group members
- Young people, staff and parents/carers aware that drugs/alcohol not permitted
- Young people/parents/carers understand sanctions if alcohol/drug rules are broken
- Accommodation selected without balconies or group briefed and supervised re dangers of balconies
- Accommodation and timing of visit chosen to minimize risk of 'stranger danger'
- Security of accommodation and bathroom facilities appropriate for group

NOTES

- At least one of the party leaders should hold the SCO Award or have extensive experience of leading ski trips. Visit leaders who supervise skiing are strongly advised to hold the Alpine Ski Leaders Award (formerly the SCOII). Ski tour companies may offer attendance on these courses in place of inspection visits.
- Visit leaders are advised to opt for full instructional provision of 4 or 5 hours per day.
- The use of helmets with novice skiers is increasing annually. There are arguments for and against but perceived good practice changes over time; in future the use of helmets for young people may be the norm – in some countries they are mandatory. Parents may wish to make an informed choice as to whether or not their children wear helmets.
- An exploratory inspection visit by the visit leader is highly desirable.
- Accidents on skiing visits often happen outside of skiing activities. Tobogganing, sledging, 'poly bagging' and ice-skating all have their own associated safety issues that should be carefully considered before inclusion in a programme.
- Serious accidents and fatalities have occurred as a result of misuse of hotel balconies or windows. Balconies and windows also present possible unauthorised entry and exit points for pupils and/or unwelcome visitors.

Staff supervised ski sessions: The following guidelines should be applied:

- Staff supervised skiing must be led/supervised by appropriately qualified staff (see [Annex 3](#) for relevant qualifications).
- Staff supervised sessions usually take place following formal instructional sessions, normally towards the end of a skiing day. It is essential to recognise the likelihood of fatigue and plan accordingly.
- Young people learn and improve rapidly. Adults supervising skiing must have sufficient skill,

experience and fitness to cope with this rapid development.

ACTIVITY	SKIING & SNOWBOARDING (DRY SLOPE) <ul style="list-style-type: none">• Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.• Leadership awards for this activity are detailed in Annex 3, Educational Visits• The Snowsport Wales website provides useful information for those involved in organisation and leadership of skiing www.snowsportwales.net
HAZARDS	<ul style="list-style-type: none">▪ Falls, collisions• Hand & thumb injuries• Sports injuries
SAFETY MEASURES	
<ul style="list-style-type: none">▪ Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity)▪ Before commencement of the session, pupils must be reminded of the safety precautions to be followed.▪ Appropriate area of slope used according to ability of young people▪ Long sleeved clothing and mittens/gloves worn to reduce risk of friction burn/hand and thumb injury▪ Session planned to avoid busiest times at venue▪ Only qualified individuals to adjust bindings▪ Participants warm up before skiing.	
NOTES	
<p>- Dry slope skiing & boarding is different to snow! Young people who have only snow skied previously should be encouraged to start gently, not head straight to the top, until they are used to the new surface.</p>	

ACTIVITY	SLEDGING <ul style="list-style-type: none">• Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none">▪ Falls, collisions▪ Cold related injuries▪ Sports injuries▪ Avalanches
SAFETY MEASURES	

- Leader approved by Head/EVC (and LA Outdoor Education Adviser if sledging will take place in demanding environment as defined in [Table Pii](#) of this guidance)
- Slope free of hazards and with safe run out used for the activity
- Activity managed to reduce risk of collision with others
- Participants wear mittens or gloves and long sleeved clothing
- Appropriate clothing and footwear for temperature and weather
- Before commencement of the session, it is recommended that pupils should 'warm up'
- Avalanche-safe slope selected, following local advice

ACTIVITY	SURFING & BODYBOARDING <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Undertow and general water hazards - drowning • Hypothermia • Rips and offshore winds - drifting offshore • Sudden changes in weather and water conditions • Collision with fixed objects, rocks, other people, etc • Sports injuries • Pollution
QUALIFICATIONS	BSA Level 1 Coach
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Effective supervision by leader at all times – regular headcounts • Ideally one adult in the water and one on the beach • Buddy system recommended for group • Steeply shelving beaches/dumping waves avoided • Leaders know venue well and have ascertained level of risk from rips/undertow • Water confidence of participants ascertained and session structured accordingly • Appropriate wetsuits/clothing for water and air temperature • Defined and agreed surfing area • Clear signal to call all participants back to shore • Foam boards for novices • Appropriate form of rescue available on beach (wade in if small surf, rescue board in bigger surf etc) • Nature of surf break known – gentle, sloping beach with spilling waves less than 1 metre ideal for novices • Participants warm up before session • Water quality can vary around the coast. Check via local knowledge, surfing websites etc. 	

ACTIVITY	SWIMMING AND PADDLING IN NATURAL WATERS <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> Drowning Cramp Slips, trips, falls Effects of cold/hypothermia Sports injuries Drifting offshore Strong current Cuts, stings and bites (Weaver fish etc) Water borne diseases and pollution - illness
QUALIFICATIONS	<p>Depending on location and group size, one or more supervisory staff who have been trained and inducted to run this type of session via one of the following awards:</p> <ul style="list-style-type: none"> - National Beach Lifeguard - National Rescue Award for Swimming Teachers and Coaches - Aquatic Rescue Test for Outdoor Activity Supervisors - Emergency Response Open Water <p>PLUS</p> <ul style="list-style-type: none"> - Current First Aid (and resuscitation)
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading swimming in natural waters) Careful choice of venue and conditions Staff: pupil ratios chosen to allow effective supervision Operate a 'buddy system' with pupils in pairs. Swimming ability of individuals known/taken into account when planning activity/venue Activity structured to allow effective supervision at all times, including regular head counts A tightly defined, controllable area should be identified Bed checked for any sharp/snagging obstacles Venue chosen with good entry/exit - avoid steep earth/rock slopes if possible Footwear such as old trainers/wetsuit booties considered to avoid cuts/stings to feet Diving not permitted unless safe venue, careful risk assessment and safety measures No eating for at least 30 minutes beforehand First aid kit to hand including method to re-warm a casualty if appropriate Careful briefing including distress signals and 'everyone out' signal Whenever possible use sites with official lifeguard cover Young people counted into and out of the water and regular headcounts during session Warm-up before session advised Water should be free from pollution – check with Environment agency or local knowledge 	
NOTES	
<ul style="list-style-type: none"> Leaders should be aware that even strong swimmers can momentarily panic if they jump into cold water. The rule of thumb of 'wade in before you jump in' should be followed. Furthermore, leaders should 	

position themselves so that if anyone gets into unexpected difficulties anywhere within the defined area they can be retrieved by wading, reaching or throwing a float or rope. A disproportionate number of recent fatalities on school visits have been drownings. (8 out of 12 deaths since September 2000) Few of these had been planned swimming activities.

- Swimming in the sea brings additional issues from variable factors such as currents, rips and waves
- People that are good swimmers in pools are not necessarily as capable in open cold water. Sudden immersion can have a disabling effect and strong swimmers do drown.

ACTIVITY	<p>SWIMMING POOLS WITHOUT EXTERNAL LIFEGUARD COVER</p> <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Drowning • Cramp • Slips, trips, falls • Sports injuries
QUALIFICATIONS	<p>A member of staff who holds the National Rescue Award for Swimming Teachers and Coaches (or equivalent life guarding qualification) must be supervising at all times. They, or another member of staff present must hold a Current First Aid qualification (with resuscitation).</p>
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC • Pool is clean and regularly serviced • Pool depths suitable for the group • Water clear and appropriate temperature • Changing and showering facilities are safe and hygienic • Diving not permitted unless in designated area • Staff: pupil ratios chosen to allow effective supervision • Swimming ability of individuals known/taken into account when planning activity/venue • Activity structured to allow effective supervision at all times, including regular head counts • No eating for at least 30 minutes beforehand • Lifesaving equipment to hand • First aid kit to hand • Non swimmers must be identified and kept in shallow water or wear flotation device • Careful briefing including distress signals and 'everyone out' signal • Young people counted into and out of the water and regular headcounts during session • Group briefed on hazards of slippy surfaces and not to run • Group briefed to follow local procedures at swimming pool • Warm-up before session 	

ACTIVITY	<p>VISITS ABROAD</p> <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> Risks associated with host country e.g. natural disaster/war/terrorist threat/health issues Road traffic abroad – accidents Accommodation – fire Alcohol/drug abuse Accommodation – balconies Remote supervision – getting lost/emergencies Child protection issues – unsuitable contact/abuse
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by Head/EVC (and LA Outdoor Education Adviser if visit will involve activity in a demanding environment as defined in Table Pii or involves an adventure activity as defined in Table Piii of this guidance) Advice from Foreign and Commonwealth Office web site considered prior to host country choice and prior to visit Consideration of medical and health issues, including appropriate vaccinations, medical insurance, European Health Insurance Cards etc Briefing about differences in road traffic and driving standards eg: look left first! Particular care with UK coaches abroad (e.g. exit doors opening into the traffic) Adequate fire detection, alarm and evacuation systems in place Fire drill practice carried out for whole group on arrival Rules re smoking and naked flames in rooms understood by all group members Young people, staff and parents/carers aware that drugs/alcohol not permitted Young people/parents/carers understand sanctions if alcohol/drug rules are broken Accommodation selected without balconies or group briefed and supervised re dangers of balconies Group briefed on boundaries, meeting points/times and method to contact leaders if lost Pupils in groups of no less than 2 Bilingual 'Help cards' carried by young people with contact names, numbers and key phrases etc. Accommodation secure from intruders Group have exclusive use of accommodation – no incompatible groups/individuals present 	
NOTES	
<p>- Visit leaders should ensure that LA guidance on visits abroad in Section N of Educational Visits is followed in the planning and organization of the visit.</p>	

ACTIVITY	HILL & MOUNTAIN WALKING, NOT WINTER CONDITIONS <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. Leadership awards for this activity are detailed in Annex 3, Educational Visits Mountain Leader Training Wales is the National Governing Body for climbing and walking. Their website is an important source of information for those leading this activity www.mltw.org
HAZARDS	<ul style="list-style-type: none"> Extreme weather conditions – wind, cold, precipitation Sudden changes in weather conditions Stone fall Lightning
SAFETY MEASURES	
<ul style="list-style-type: none"> Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) Detailed weather forecast obtained and a 'weather eye' kept on conditions during activity Escape routes planned in case sudden descent required Careful route selection to minimise risk of stone fall Group briefed on hazards and methods to reduce risk (e.g. procedure on scree slopes, scrambling sections) Group briefed to warn others if rock dislodged and action to take if warning heard If caught in lightning, group sit out in safest zone (away from spark gaps and summits if possible) 	
NOTES	
<ul style="list-style-type: none"> - D of E expeditions are dealt with on a separate page - Mobile phones are frequently out of range in the hills and, although potentially very useful in emergency, must not be relied on 	

ACTIVITY	HILL AND MOUNTAIN WALKING, WINTER CONDITIONS <ul style="list-style-type: none"> Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. Leadership awards for this activity are detailed in Annex 3, Educational Visits Mountain Leader Training Wales is the National Governing Body for climbing and walking. Their website is an important source of information for those leading this activity www.mltw.org
HAZARDS	<ul style="list-style-type: none"> Terrain – slips, trips and falls Exposure to extreme weather conditions – wind, cold, precipitation Sudden changes in weather conditions Cold related injuries Avalanches Snow blindness Unplanned benightment Stone fall

<ul style="list-style-type: none"> • Lightning 	
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Appropriate method used to safeguard crossing of iced sections • Group equipped and trained in the use of ice axe and crampons • Spare gloves, hats and fleece recommended • Detailed weather history known and avalanche report obtained if available • Leader(s) competent in identifying likely avalanche-prone slopes • Route chosen to avoid avalanche prone slopes • Eye protection (ski goggles or similar) available • Torches carried to allow group to get off the hill after dark • Careful consideration of route/activity to minimise risk of unplanned benightment • Appropriate equipment carried to allow whole group to shelter overnight in emergency • Group trained in bivvy techniques if appropriate • Careful route selection to minimise risk of stone fall • Group briefed on hazards and methods to reduce risk (e.g. procedure on scree slopes, scrambling sections) • Group briefed to warn others if rock dislodged and action to take if warning heard • Detailed weather forecast obtained and a 'weather eye' kept on conditions during activity • Escape routes planned in case sudden descent required • If caught in lightning, group sit out in safest zone (away from spark gaps and summits if possible) 	
NOTES	
<p>- The safe use of ice axe and crampons should be taught before venturing into terrain where they are necessary to make safe progress. Participants in such 'snow craft' training sessions must wear helmets and the site carefully selected for a safe run out for ice axe braking practice. Crampons should not be worn during ice-axe braking practice.</p> <p>- Climatic and underfoot conditions during the winter months are compounded by short daylight hours and the consequent implications for route length and group fitness.</p> <p>- 'Winter conditions' cannot be defined by exact dates and the term therefore relates to:</p> <ul style="list-style-type: none"> • all occasions when the route or any part of it is covered in snow or ice which cannot be easily avoided • times when the existing or the forecast weather conditions for a route include near freezing temperatures with strong winds or persistent rain or snow. These conditions can occur at any time of the year in the British mountains 	
ACTIVITY	WHITEWATER RAFTING <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Drowning • Heavy loads - lifting injuries • Shoreline/banks - slips, trips, falls and cuts • Hypothermia • Impact injuries – paddles/rocks etc • Sports injuries • Water borne pollution and diseases

MINIMUM LEADER QUALIFICATIONS	WCA/BCU Raft Guide Award plus First Aid qualification (with resuscitation).
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) • Buoyancy aids and helmets worn by all participants • Manufacturer's recommendations followed with regard to care, testing and lifespan for buoyancy aids and helmets • Water confidence of individuals known and actual/forecast river levels taken into account when planning activity/venue • Throwlines carried and leader trained in use • Participants briefed and supervised in safe lifting technique • Suitable footwear worn by all group members to minimize risk of slips, trips, falls and cuts. • Route on shore chosen to minimise risk of slips, trips, falls and cuts • Group appropriately equipped and clothed for venue/activity/water and air temperature • Emergency equipment carried, including method to re-warm individuals if appropriate • Warm-up before session recommended • Rafts have suitable level of buoyancy for group and water – self-bailing recommended • WCA/Environment agency or other local knowledge consulted re pollution and environmental issues prior to site use • Open cuts and sores covered by waterproof bandage or similar • Hands cleaned prior to eating if water quality suspect 	
NOTES	
<ul style="list-style-type: none"> • Local access agreements must be adhered to 	

ACTIVITY	WINDSURFING <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity. • Leadership awards for this activity are detailed in Annex 3, Educational Visits • The Welsh Yachting Association is the National Governing Body for sailing and windsurfing. Their website is an important source of information for those leading this activity www.thewya.org.uk
HAZARDS	<ul style="list-style-type: none"> • Drowning • Being struck by the boom/mast • Lifting injuries • Hypothermia • Drifting offshore • Collision with fixed objects/other water users – impact injuries
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by LA Outdoor Education Adviser and Head/EVC (if teacher, youth worker or similar is leading the activity) 	

- Buoyancy aids/lifejackets as appropriate
- Session planned to allow effective supervision at all times
- Safety boat support provided
- Water confidence of participants ascertained and session planned accordingly
- Defined and agreed sailing area
- Helmets considered for introductory sessions
- Group trained and supervised in safe lifting technique
- Appropriate wetsuit/protective clothing worn for the air/water temperature
- Venue chosen to minimise risk of drifting offshore or collision with fixed objects/other water users

ACTIVITY	WOODLAND ACTIVITIES/FOREST SCHOOL <ul style="list-style-type: none"> • Note: This page lists typical issues above and beyond those listed for all off site visits and should be read in conjunction with this. It is not exhaustive but is intended as a starting point for schools/centres when preparing a risk assessment/operating procedure for this activity.
HAZARDS	<ul style="list-style-type: none"> • Fire - burns & scalds • Weather extremes – wind, cold, heat • Heavy loads – lifting injuries • Environmental damage by group – fires, pollution • Micro-organisms - sickness/hygiene related illness • Food poisoning • Use of tools – cuts and lacerations <ul style="list-style-type: none"> ▪ Building shelters – collapse ▪ Blindfold activities – nightline • Stranger danger
SAFETY MEASURES	
<ul style="list-style-type: none"> • Leader approved by Head/EVC (and LA Outdoor Education Adviser if group will be sleeping out in demanding environment as defined in Table Pii of this guidance) • Cooking area chosen to reduce risk of starting wild fire • Open fires only lit in dedicated fire pit or similar • Appropriate supervision of fire-lighting and cooking by member of staff • Group briefed in danger of wild fire • Running and moving games prohibited close to lit fire • First aid kit includes burns dressings • Method to extinguish fire readily available and known to group • Appropriate protective clothing and footwear worn for the venue/weather/activity • Young people briefed and supervised re safe use of tools • Pupils briefed re poisonous plants/fungi if relevant • Hands washed prior to eating • Cooking and food preparation meets health and hygiene standards • Shelters built from suitably sized material for age and size of pupils • Shelters dismantled and area left clear after use (unless dedicated forest school site) • Serviceable sleeping bags and ground insulation • Group trained in shelter construction and supervised • Shelters inspected before group can enter/sleep in them • Careful selection of site taking into consideration environmental impact and likelihood of other 	

users

- Group briefed about danger of illness and outdoor hygiene
- Group briefed on methods to sterilize water or sources of clean natural drinking water
- Group trained in environmentally sound washing and toilet procedures
- Group clean area prior to leaving to ensure minimum environmental impact
- Venue and timing of visit chosen to minimize risk of inappropriate contact with strangers
- Pupils in small groups (not alone) and briefed in how to alert staff if required

National Governing Bodies and representative organisations

The following organisations have a lead role in each particular activity; most provide training and assessment schemes at a variety of levels and all will provide advice on technical issues. It must be remembered, however, that most exist to serve their recreational membership and are therefore often not accustomed to dealing with educational matters.

ANGLING

Welsh Federation of Coarse Anglers

Hon. Secretary, Penceilogwydd Farm, Penclacwydd, Llanelli, SA14 9SH, Tel: 01554 759444

Email: robindarker@aol.com

Welsh Salmon and Trout Angling Association

Hon Secretary, 97 Maesceinion, Waunfawr, Aberystwyth, SY23 3QQ

Tel: 01970 624791 www.wstaa.org

Welsh Federation of Sea Anglers

Hon. Secretary, 23 Park Road, Bargoed, Caerphilly, CF8 8SQ

Tel: 01443 831684 www.wfsa.org.uk

ARCHERY

Welsh Archery Association

241 Barry Road, Barry, Vale of Glamorgan, CF62 9BH

Tel: 01446 735260 www.wfaa-archery.co.uk

CANOEING & KAYAKING

Welsh Canoeing Association

Canolfan Tryweryn, Frongoch, Bala, Gwynedd, LL23 7NU

Tel: 01678 521199 Fax: 01678 521158 www.welsh-canoeing.org.uk

CAVING

Cambrian Caving Council

Hon. Secretary, 6 Dolau Tywi, Manordeilo, Carmarthenshire, SA19 7BL

www.caveinfo.org.uk/nca/ccc.htm

British Caving Association

Tony Flanagan, Ffrancon House, Thornton in Lonsdale, Carnforth, LA6 3PB

Tel. 01524 241737 www.british-caving.org.uk

CYCLING

Welsh Cycling Union

Wales National Velodrome, Spyttty Park Sports Complex, Traston Lane, Newport, NP19 4RR

www.cyclewales.org.uk

Cycle Touring Club

69 Meadrow, Godalming, Surrey, GU7 3HS

Tel: 0870 873 0060 Fax: 0870 873 0064 www.ctc.org.uk

HORSE RIDING

Wales Trekking and Riding Association

7 Rhos Ferig Road, Brecon, LD3 7NG www.ridingwales.com

Trekking and Riding Society of Scotland

Boreland, Aberfeldy, Perthshire, PH15 2PG

Tel: 01968 660346 www.ridinginscotland.com

British Horse Society

Stoneleigh Deer Park. Kenilworth, CV8 2XZ

Tel: 01926 707700 www.bhs.org.uk

Association of British Riding Schools

Queens Chambers, 38-40 Queen Street, Penzance, TR18 4BH

Tel: 01736 369440 www.abrs-info.org

KITE SURFING

British Kite Surfing Association

PO Box 7871, East Leake, Leicestershire, LE12 6WL

www.kitesurfing.org

MOUNTAINEERING

Mountain Leader Training Wales

Siabod Cottage, Capel Curig, Conwy, LL24 0ET

Tel: 01690 720361 www.mltw.org

British Mountaineering Council (Wales)

4 Hengoed Park, Hengoed, Caerphilly, CF82 7NG

Tel: 01443 816923 www.thebmc.co.uk/thebmc/areacom/area_res.asp?area_drop=7

ORIENTEERING

Welsh Orienteering Association

55 Coleridge Crescent, Killay, Swansea, SA2 7ER

Tel: 01792 204643 www.woa.org.uk

British Orienteering Federation

Riversdale, Dale Road, North Darley Dale, Matlock, Derbyshire, DE4 2HX

Tel: 01629 734042 www.britishorienteering.org.uk

ROCK CLIMBING

See **Mountaineering**

ROWING

Welsh Amateur Rowing Association

Hon. Secretary, 6 Holgate Close, Llandaff, Cardiff, CF5 2PE
Tel: 02920 319909 www.wara.org.uk/index.php

SAILING

Welsh Yachting Association

8 Llys-y-Mor, Plas Menai, Caernarfon, Gwynedd, LL55 1UE
Tel: 01248 670738 www.welshsailing.org

Royal Yachting Association

Ensign Way, Hamble, Southampton, Hampshire, SO31 4YA
Tel: 0845 345 0400 www.rya.org.uk

SKIING & SNOWBOARDING

Snowsport Cymru Wales

Cardiff Ski Centre, Fairwater Park, Fairwater, Cardiff, CF15 3JR
Tel: 02920 561904 www.snowsportwales.net

British Association of Ski Instructors

BASI Office, Grampian Road, Aviemore, Inverness, PH22 1RL
Tel: 01479 86717 www.basi.org.uk

SUB AQUA

Sub Aqua Association

Space Solutions Business Centre, Sefton Lane, Maghull, Liverpool, L31 8BX
Tel: 0151 287 1001 www.saa.org.uk

Welsh Association of Sub Aqua Clubs

Mr Bill Trezise, Secretary, Little Began House, Began Road, Old St Mellons, Cardiff, CF3 6XJ

Tel: 02920 777293

British Sub-Aqua Club

South Pier Road, Ellesmere Port, South Wirral, Cheshire, L65 4FL

Tel: 0151 3506200 www.bsac.com

SURF LIFE SAVING

Surf Life Saving Association (Wales)

Hon. Secretary, 10 Greenacres, South Cornelly, Bridgend, CF33 4SE

Tel: 01656 742420 Fax: 01656 745511 www.slsawales.org

SURFING

Welsh surfing federation

www.geocities.com/welshsurfing

SWIMMING

Welsh Amateur Swimming Association

Wales National Pool, Sketty Lane, Swansea, SA2 8QG

Tel: 01792 513636 www.welshasa.co.uk

WATERSKIING

British Water Ski Federation

390 City Road, London, EC1V 2QA

Tel: 02078 332855 www.britishwaterski.org.uk

WINDSURFING

See **Sailing**

Useful contacts

Government Departments

Department for Education and Skills

Sanctuary Buildings, Great Smith Street, Westminster, London, SW1P 3BT

Tel: 0171 925 5000

TQMP (List 99 Vetting)

Rm 105 (OH), Department for Education and Skills, Mowden Hall, Darlington, DL3 9BG

Tel: 01325 392 171 Fax: 01325 392 178

Department of the Environment, Transport and the Regions

Great Minster House, 76 Marsham Street, London, SW1P 4DR

Tel: 0171 890 3000

The Foreign & Commonwealth Office's Travel Advice Unit

Consular Division, 1 Palace Street, London, SW1E 5HE

Tel: 0171 238 4503/4504 (Mon-Fri 9: 30 - 16: 00 hours) Fax: 0171 238 4545

Travel advice notices and leaflets are available on BBC2 Ceefax pages 470 onwards and on the

Internet at <http://www.fco.gov.uk>

Health and Safety Executive

Health and Safety Enquiries and contact numbers for local HSE Offices available from HSE Infoline
Tel: 0541 545500

or write to:

HSE Information Centre, Broad Lane, Sheffield, S3 7HQ www.hse.gov.uk

Home Office Immigration and Nationality Directorate

IPD Room 1101, Apollo House, 36 Wellesley Road, Croydon, CR9 3RR

Tel: 0181 760 8773 Fax: 0181 760 8777 www.ind.homeoffice.gov.uk

Department of Trade and Industry

1 Victoria Street, London, SW1H 0ET

Tel: 0171 215 5000

Unions and Associations

Association of Colleges

5th Floor, Centre Point, 103 New Oxford Street, London, WC1A 1DD

Tel: 071 827 4600

Association of Teachers and Lecturers

7 Northumberland Street, London, WC2N 5DA

Tel: 0171 930 6441

National Association of Head Teachers

1 Heath Square, Boltro Road, Haywards Heath, West Sussex, RH16 1BL

Tel: 01444 472 472

National Association of Schoolmasters/Union of Women Teachers

Hillscourt Education Centre, Rose Hill, Rednal, Birmingham, B45 8RS

Tel: 0121 453 6150

National Union of Teachers

Headquarters, Health and Safety Unit, Hamilton House, Mabledon Place, London, WC1H 9BD

Tel: 0171 388 6191

Professional Association of Teachers

2 St James' Court, Friar Gate, Derby, DE1 1BT

Tel: 01332 372337

Secondary Heads Association

130 Regent Road, Leicester, Leicestershire, LE1 7PG

Tel: 0116 299 1122

UNISON

1 Mabledon Place, London, WC1H 9AJ

Tel: 0171 388 2366

Others

Adventure Activities Licensing Services (AALS)

44 Lambourne Crescent, Llanishen, Cardiff, CF14 5GG Tel: 02920 755715 www.aals.org.uk

Association for Physical Education (AfPE)

Building 25, London Road, Reading, RG1 5AQ Tel: 0118 378 2440 www.afpe.org.uk

Association of British Travel Agents (ABTA)

68 -71 Newman Street, London, W1P 4AH Tel: 0207 637 2444

Association of Heads of Outdoor Education Centres (AHOEC)

Bendrigg Lodge, Old Hutton, Kendal, Cumbria, LA8 0NR www.ahoec.org

British Activity Holiday Association (BAHA)

22 Green Lane, Hersham, Walton on Thames, KT12 5HD Tel: 01932 252994 www.baha.org.uk

British Safety Council

National Safety Centre, 70 Chancellors Road, Hammersmith, London, W6 9RS Tel: 02087 411231

British Schools Exploring Society (BSES)

1 Kensington Gore, London, SW7 2AR Tel: 0207 591 3141 www.bses.org.uk

British Tourist Authority and English Tourist Board

Thames Tower, Black's Road, Hammersmith, London, W6 9EL Tel: 02088 469000

Central Bureau for Educational Visits and Exchanges

10 Spring Gardens, London, SW1A 2BN, Tel: 0207 389 4004

Central Council of Physical Recreation (CCPR) and The British Sports Trust

Francis House, Francis Street, London, SW1P 1DE Tel: 0207 828 3163

Child Accident Prevention Trust

18-20 Farringdon Lane, London, EC1R 3HA Tel: 02076 083828

CLEAPSS

School Science Service (Field Studies Advice), Brunel University, Uxbridge, UB8 3PH

Tel: 01895 251496

Confederation of Passenger Transport UK

Imperial House, 15-19 Kingsway, London, WC2B 6UN Tel: 02072 403131

Disability Sport Wales

Local Authority contacts listed on website www.disability-sport-cymru.co.uk

The Duke of Edinburgh's Award (Wales)

Oak House, 12 The Bulwark, Brecon, Powys, LD3 7AD

Tel: 01874 623086 Fax: 01874 611967 www.dofe.org

The Field Studies Council (FSC)

Head Office, Montford Bridge, Preston Montford, Shrewsbury, Shropshire, England, SY4 1HW

Tel: 0845 3454071 www.field-studies-council.org

Institute for Outdoor Learning (IOL)

12 St Andrew's Churchyard, Penrith, Cumbria, CA11 7YE

Tel: 01768 865113 www.outdoor-learning.org.uk

The Maritime and Coastguard Agency

Spring Place, 105 Commercial Road, Southampton, SO15 1EG Tel: 01703 329395

Medical Advisory Service For Travellers Abroad (MASTA)

London School of Hygiene and Tropical Medicine, Moorfield Road, Leeds, LS19 7BN

Travellers' Health Line 0891 224100 (50p per minute) Tel: 0113 239 1707 www.masta.org

National Association of Farms for Schools

Agriculture House, 164 Shaftesbury Avenue, London, WC2H 8HL

Tel: 0207 331 7292 www.farmsforschools.org.uk

National Association of Field Studies Officers (NAFSO)

CEES Stibbington Centre, Church Lane, Stibbington, Peterborough, PE8 6LP

Tel: 01780 782386 www.nafsco.org.uk

Outdoor Education Advisers' Panel (OEAP) www.oeap.info/

Royal Association for Disability And Rehabilitation (RADAR)

12 City Forum, 250 City Road, London, EC1V 8AF

Tel: 0207 250 3222 www.radar.org.uk

The Royal Geographical Society (RGS) Expedition Advisory Centre

1 Kensington Gore, London, SW7 2AR Tel: 02075 913000 www.rsg.org

Royal Life Saving Society (RLSS)

River House, High Street, Broom, Warwickshire, B50 4HN

Tel: 01789 773994 www.lifesavers.org.uk

The Royal Society for the Prevention of Accidents (RoSPA)

Edgbaston Park, 353 Bristol Road, Birmingham, B5 7ST

Tel: 0121 248 2000 www.rospace.co.uk

School and Group Travel Association

Katepwa House, Ashfield Park Avenue, Ross-on-Wye, Herefordshire, HR9 5AX

Tel: 01989 567 690

School Journey Association

48 Cavendish Road, London, SW12 0DG

Tel: 0181 675 6636

School Travel Forum (STF)

www.stf.co.uk

Scottish Sports Council

Caledonia House, South Gyle, Edinburgh, EH12 9DQ

Tel: 0131 317 7200

Scottish Tourist Board

23 Ravelston Terrace, Edinburgh, EH4 3EU

Tel: 0131 332 2433

Snowdonia National Park Authority

Education Officer, Plas tan y Bwlch, Maentwrog, Gwynedd, LL41 3YU

Tel: 01766 772615

Fax: 01766590274

www.eryri-npa.gov.uk

Sports Council for Wales

Sophia Gardens, Cardiff, CF1 9SW

Tel: 02920 338200

Fax: 02920 300600

www.sports-council-wales.co.uk

Wales Tourist Board

Brunel House, 2 Fitzalan Road, Cardiff, CF2 1UY

Tel: 01222 499909

Youth Exchange Centre

10 Spring Gardens, London, SW1A 2BN

Tel: 0171 389 4004

Youth Hostel Association (YHA)

Trevelyan House, Dimple Road, Matlock, Derbyshire, DE4 3YH

Tel: 01629 592600

Fax: 01629 592702

www.yha.org.uk

Other guidance

Planning Visits

Education Reform Act 1998: Charges for School Activities, Circular 2/89. Available from DFES Publications Centre, see Annex 6 for address details.

Educational Visits and Journeys - National Association of School Masters/Union of Women Teachers (NASUWT) 1994 £2.50. Available from NASUWT, see Annex 6 for address details.

The following publications are produced by the Health and Safety Commission (HSC)/Health and Safety Executive (HSE):

5 steps to risk assessment: A step by step guide to a safer and healthier workplace IND(G)163 Rev 1 1998 - free booklet or available in priced packs ISBN 0 7176 0904 9

Managing Health and Safety: Five Steps to Success IND(G) 275 - free leaflet

A guide to risk assessment requirements: common provisions in health and safety law (1996) IND(G)218 - free leaflet or available in priced packs ISBN 0 7176 1211 2

HSE priced and free publications are available from HSE Books, see end of Annex 6 for address details.

Health and Safety Guidance for School Governors and Members of School Boards - Education Service Advisory Committee 1998 (revised edition) £5.95 ISBN 0 717 612 988. Available from HSE Books, see Annex 6 for contact details.

Safety on School Trips: A Teachers and the Law Booklet - The Professional Association of Teachers (PAT) £3.50 plus p&p to non-members. Available from PAT, see Annex 6 for address details.

Safe Practice in Physical Education and School Sport (2008)

Available from Coachwise, Chelsea Close, Off Amberley Road, Armley, Leeds. LS12 4HP

Safety on School Journeys - National Union of Teachers (NUT) and supported by The Royal Society for the Prevention of Accidents (RoSPA). Available free from the NUT Headquarters Health and Safety Unit, see Annex 6 for address details.

A Streetwise Guide to: Going Places and *A Streetwise Guide to Having a Good time in your Free time* - Metropolitan Police. Available from Directorate of Public Affairs, New Scotland Yard Tel: 0171 230 0766.

Guide to Health and Safety at School No5: Out and About - Schools Trips Part 1 - The Royal Society for the Prevention of Accidents (RoSPA). Available from RoSPA, see Annex 6 for address details.

School Travel Organisers Guide 1997/98 – Hobsons Publishing in association with the National Tourist Board of England, Northern Ireland, Scotland and Wales £7.95 ISBN 1 86017 449 3. Available from Hobsons Publishing, Bateman Street, Cambridge CB2 1LZ Tel: 01223 345551.

Taking Students Off-Site - Association of Teachers and Lecturers (ATL) 1997. Available from ATL, see Annex 6 for address details.

Together Safely: Developing a Whole School Approach to Health and Safety - The Royal Society for the Prevention of Accidents (RoSPA). Available from RoSPA, see Annex 6 for address details.

Wise Before the Event - Calouste Gulbenkian Foundation £5.00 ISBN 09 0331966 7. Available from Turn-a-round, Unit 3 Olympia Trading Estate, Cobury Road, London N22 6TZ Tel: 0181 829 3000.

Guidance on First Aid for Schools - A Good Practice Guide - DFES. Available from DFES Publications Centre, see end of Annex 6 for address details.

Preparing Pupils

**Circular 14/96 - Supporting Pupils with Medical Needs in School*

**Supporting Pupils with Medical Needs - A Good Practice Guide*

Available from DFES publications centre, see end of Annex 6 for address details.

*DFES joint publication with the Department for Health.

Planning Transport

Advice to Users and Operators of Minibuses and Coaches Carrying Children VSE 1/96 and VSE 2/96 - Department of the Environment, Transport and the Regions (DETR). Available free from DETR, the Vehicle Standards and Engineering Team, Zone 2/04, see Annex 6 for address details.

Taking a Minibus Abroad - DETR. Available from DETR, Road Haulage Division, Zone 2/11, see Annex 6 for address details.

The Use of Minibuses - National Association of School Masters/Union of Women Teachers (NASUWT) 1994. Available from NASUWT, see Annex 6 for address details.

The School Minibus and the Law - Association of Teachers and Lecturers (ATL). Available from ATL, see Annex 6 for address details.

Drivers' Hours and Tachographs: Rules for Road Passenger Vehicles in the UK and Europe: PSV375 rev 8/97 - DETR Available free from DETR, Tel: 0171 676 2756 or 2756, see Annex 6 for address details.

Public Service Vehicles Conditions of Fitness, Equipment, Use and Certification - DETR £3.00 ISBN 0 11 016257 9. Available from The Stationery Office, see Annex 6 for address details.

School Minibuses: A Safety Guide - National Union of Teachers (NUT). Available free from the NUT Information Unit, see Annex 6 for address details.

Minibus Safety: A Code of Practice - The Royal Society for the Prevention of Accidents (RoSPA) £7.12 including VAT RSGEN 146. Available from RoSPA, see Annex 6 for address details.

Guide to Health and Safety at School No7: Out and About - Schools Trips Part 3 Transport and Travel - The Royal Society for the Prevention of Accidents (RoSPA). Available from RoSPA, see Annex 6 for address details.

Guide to Health and Safety at School No 3: Out and About - School Minibus Part 1 and Guide to Health and Safety at School No 4: Out and About – School Minibus Part 2 - The Royal Society for the Prevention of Accidents (RoSPA). Available from RoSPA, see Annex 6 for address details.

Health and Safety Fact Sheet on Off-Site Activities - Fred Sherwood/Further Education Development Agency (FEDA) ISBN 1 85338 458. Available free from the Publications Department, FEDA, Citadel Place, Tinworth Street, London SE11 5EH Tel: 01761 462 503.

Types of Visit

999 Coastguard Teacher's Guide: Safety and Fun at the Seaside - Maritime and Coastguard Agency (1 free pack per school). Available from the Maritime and Coastguard Agency, see Annex 6 for address details.

The Award Handbook and Expedition Guide – The Duke of Edinburgh's Award. Available from The Award Scheme Ltd, Unit 18/19 Stewart Field, off Newhaven Road, Edinburgh EH6 5RQ Tel: 0131 553 5280.

Guide to Health and Safety at School No6: Out and About - Schools Trips Part 2 Adventures at Home and Away - The Royal Society for the Prevention of Accidents (RoSPA). Available from RoSPA, see Annex 7 for address details.

Guidance to the Licensing Authority on The Adventure Activities Licensing Regulations 1996 Health and Safety Commission £9.00 ISBN 0 7176 1160 4 L77. Available from HSE Books, see Annex 6 for address details.

Avoiding ill health at open farms: Advice to teachers AIS23 Supplement - Health and Safety Executive 1998. Available from HSE Books, see Annex 6 for address details.

Pupil Visits to Farms: Health Precautions – DFES circular letter of 9 June 1997. Available from: Pupil Health and Safety Team, DFES, Sanctuary Buildings, Great Smith Street, London, SW1P 3BT Tel: 0171 925 6490.

Quality, Safety and Sustainability - Field Study Centres: A Code of Practice - National Association of Field Studies Officers (NAFSO). Available from NAFSO, see Annex 6 for address details.

Safe Supervision for Teaching and Coaching Swimming - Joint publication by the Amateur

Swimming Association and other bodies £1.50. Available from The Institute of Sport and Recreation Management, Giffard House, 36-38 Sherrard Street, Melton Mowbray LE13 1XJ Tel: 01664 565 531.

Safety on British Beaches - Joint publication by The Royal Life Saving Society and The Royal Society for the Prevention of Accidents (RoSPA) £6.85. Available from RoSPA, see Annex 6 for address details.

Safety in Outdoor Activity Centres: Guidance, Circular 22/94. Available from DFES Publications Centre, see Annex 6 for address details.

Safety in Swimming Pools - Joint publication by the Health and Safety Commission and English Sports Council (ESC) £5.50. Available from ESC Publications, PO Box 255, Wetherby, LS23 7LZ Tel: 0990 210 255 Fax: 0990 210 266.

Self Assessment and Guidance - Adventure Activities Licensing Authority (AALA) £25. Available from the AALS, see Annex 6 for address details.

Work Experience: A Guide for Schools - DFES. Available from the DFES Publications Centre, see Annex 6 for address details.

Managing Health and Safety on Work Experience: A Guide for Organisers. Available shortly. For further details contact the DFES Work Experience Team Tel: 0114 259 4754 or 0114 259 4164.

Visits Abroad

Making the Most of Your Partner School Abroad - Central Bureau for Educational Visits and Exchanges 1991 £4.50 ISBN 0 900087 89 7. Available from the Central Bureau, see Annex 6 for address details or Tel: 0171 389 4880/0171 389 4886.

Home from Home - Central Bureau for Educational Visits and Exchanges 1998 £9.99 ISBN 1 898601 259. Details as above.

Health Advice to Travellers Anywhere in the World - The Department of Health 1998 T6. Available free from most Post Offices, travel agents and local libraries.

The Protection of Young People in the Context of International Visits - Publications Unit, Children and Families, City of Edinburgh Council, Waverley Court Business Centre 1/2, 4 East Market Street, Edinburgh EH8 8BG

Emergency Procedures

The following publications are produced by the Health and Safety Commission (HSC)/Executive (HSE):

Everyone's guide to RIDDOR '95 (1996) - HSE31 – free leaflet or available in priced packs. ISBN 0 7176 1077 2

Reporting school accidents (1997) EDIS 1 – free information sheet

HSE priced and free publications are available from HSE Books, see Annex 6 for full address details.

Safety and Disaster Management in Schools and Colleges: A Training Manual - David G Kibble 1998

£19.99 ISBN 1 85346 535 6. Available from David Fulton Publishers Ltd, Ormond House, 26-27 Boswell Street, London WC1N 3JD.

Address details for listed Government publications

Department for Education and Skills

Publications Centre

PO Box 5050

Sudbury

Suffolk

CO10 6ZQ Tel: 0845 6022260 Fax: 0845 6033360

The Stationery Office

PO Box 276

London

SW8 5DT Tel: 0171 873 9090 Fax: 0171 873 0011

HSE Books

PO Box 1999

Sudbury

Suffolk CO10 6FS Tel: 01787 881165 Fax: 01787 313995.

HSE priced publications are also available from good booksellers.

ANNEX 8

Drug issues and educational visits

As part of the planning process for an educational visit, the visit leader should carefully consider issues connected with drug use and substance misuse.

These issues include young people and adult:

- use of medicines;
- use of tobacco;
- consumption of alcohol;
- use of drugs illegal in the UK and abroad.

This section poses a series of questions that should be considered as part of the planning of a visit, and some examples of how discussions may be carried out and agreement reached.

Key questions

What are the usual school/centre rules concerning smoking tobacco, use of alcohol and illegal drugs?

Which sanctions are usually applied when these rules are broken?

Codes of Conduct and Informing Parents

It is good practice to agree the behaviour expected of young people before they leave, and to inform parents of this.

How will young people be involved in the decision making process?	A meeting is held with participating young people or their representatives. The responsibilities of the adults for ensuring young peoples' safety are described and agreed behaviour is outlined.
How will parental agreement be sought?	A contract explaining agreed behaviour is signed by the parents and young people prior to the visit.
What if the agreement is broken?	A minor infringement may result in removal of freedoms or privileges. More serious infringements may result in the young person being sent home at the parent's expense.

Extent of school/centre Rules

Existing policies on drug related issues will normally apply to all visits organised and run by the school/centre

Student Drug Use – Medicines

Visit leaders should follow the school/centre procedures for the recording of medical needs and storage and administration of medicines.

Are there young people in your party who have particular medical conditions requiring regular medication?	What additional staffing or provision will you require? How will you ensure that the health and safety of other young people and adults is not affected?
Is there a member of staff willing to administer this medication?	Staff members may or may not be willing to take on this responsibility. Staff could seek advice from their union if they wish to gain further information.

How will you ensure that the staff member has all the relevant information about the medication and its administration?

A specific time should be made to gather this information from the parents. The information should be included on the medical form and the container in which the medicines are supplied.

Does the medication require refrigeration?

Check that refrigeration facilities are available, including the journey. If not, seek medical/parental advice on alternatives.

Legal Matters when Abroad

In some countries the legal position of drugs differs from the UK position. Details of these differences may be found at www.fco.gov.uk/travel. When travelling abroad, it is desirable that the visit leader is aware of these differences. However, these differences in legal status of drugs should only alter practice or behaviour expected from young peoples/adults where the country in question has stricter rules than the UK. For example:

Country	France	UK	Iceland
Legal age to buy and consume alcohol	16 years old	18 years old but 16 with a meal	20 years old
Outcome for a UK group on a visit	UK rules apply	UK Law/rules apply	Icelandic law applies

Young peoples' Drug Use – Tobacco

Legal Position - Sale of tobacco to under 16's is illegal in the UK.

The visit leader should ensure that they and other staff in no way condone or encourage smoking. The default position is that the usual school/centre no smoking policy will apply. However, if members of the party are over 16 years, visit leaders may wish to negotiate times and places they may smoke, making the sanctions clear.

For example: a leader of a skiing course was notified that some young people would not get through a day's activities without smoking. The visit leader established prior to the course the number of cigarettes they would need and agreed they would smoke only during free time and in designated smoking areas.

Young peoples' Drug Use – Alcohol

Legal Position - In most cases, sale of alcohol to under 18's is illegal in the UK.

It is legal for those over 16 to purchase beer, cider etc if they are also purchasing a meal.

It is legal for those over 5 years old to consume alcohol in private places.

Alcohol is the substance most likely to be abused, with significant and potentially dangerous consequences for young people and staff. Every effort should be made to prevent situations where young people are endangered through alcohol misuse. It is expected that single day visits will be alcohol free. However, residential visits may present different issues.

Over 18's

Does the visit involve any young people over 18?

The proportion of young people over 18 may affect the way you deal with this issue.

Will you allow over 18's to drink alcohol at certain times, outside organised activities?

If so, what boundaries will you set? Where will you allow them to drink? Will you allow over 18's to drink only under the direct or remote supervision of a staff member?

How will the under 18's in the group be monitored?

This is only an issue if there are different parameters for over 16's and over 18's. It may be fairer to decide on the same behaviour standards for all young people.

Over 16's and evening meals

Will you allow over 16's to drink alcohol with an evening meal?

If going abroad, check this is within the law of the country you are visiting.

Will you restrict the amount or type of alcohol they may drink?

You may allow over 16's to order one or two glasses of beer, wine or cider with their evening meal.

Will you restrict drinking to group evening meals when staff members are present?

Young people and parents are clear about the sanctions for breaking the behaviour agreement.

How will you monitor those who do not have parental permission to drink alcohol during an evening meal?

Young people and parents are clear about the sanctions for breaking the behaviour agreement.

Foreign Exchange Visits for Under 16's

When young people are staying with families on an exchange visit will you allow them to drink alcohol?	Will the age of the young people affect your decision. You may decide that those over 14 may accept an alcoholic drink from their adult hosts.
Will young people be allowed to accept alcohol from their host families during an evening meal?	Young people will need to be prepared for different cultural expectations about alcohol. You may wish them only to accept beer, wine or cider.

Safety and First Aid

How will young people be reminded of personal safety messages?	The young people may only be allowed out of direct supervision in groups of 3 or more Geographical boundaries may be set for 'down time'.
What emergency procedures will be in place?	The young people must be aware of the action that is expected of them if too much alcohol is consumed. It should be emphasised that breaking the rules is a lesser consideration than individual safety. Young people should know how to summon help immediately, if they feel someone is ill or in danger.

Whatever decisions are made about alcohol use, these must be clearly communicated to young people, parents and host families. The sanctions must be made clear.

For example: one young person from the UK died on a visit to Germany through alcohol abuse. The group were allowed a small amount of alcohol during their meal, but went on to consume spirits at a local bar, during 'free time'. The boy became unconscious and his peers decided not to get help for fear of 'getting into trouble'. The boy stopped breathing and died.

It is essential to discuss emergency plans beforehand and to emphasise that personal safety is a far greater consideration than the fear of reprimand.

Young peoples' Drug Use – Illegal Drugs

Legal Position - It is illegal to possess, use and supply Class A, B and C drugs.

(For more details see www.talktofrank.com)

Cannabis is a Class C drug and is illegal

The use of solvents and 'poppers' (nitrites) is not illegal, but the course of action a school/centre takes if young people are using these substances may be similar to the action taken in the case of illegal drug use/supply.

The expectation that there will be no use of illegal substances must be clearly made to young people before departing. The sanctions usually applied to illegal drug use may be transferred to a visit's setting eg a young person found in the possession of a single cannabis cigarette may have privileges withdrawn and parents be informed on their return, a young person supplying cannabis to others may be sent home. Parents should also be made aware that should a young person be sent home this will be at the parent's expense.

In the UK teachers/youth workers are not duty bound to inform the police of illegal drug taking, although they may choose to do so if they feel this in the best interests of the child. Visit leaders should ensure they act in accordance with the school/centre drug policy when dealing with such issues.

Visit leaders should make themselves aware of the legal situation and policing arrangements that apply to the country they are visiting. When abroad, there may be other interpretations of concepts such as 'possession', 'intent' and 'criminal responsibility'.

Example: A primary school group were visiting a county-run residential site. A 10-year-old had lost an item and was being assisted in the search by a staff member. The staff member found a piece of cannabis resin in the child's bag. The child was not aware that cannabis was there. Observed by witnesses, the cannabis was placed in a sealed bag and locked away. The police were asked to collect the cannabis, but were not informed of the child's name.

Example: A 15-year-old on a visit in the UK was found smoking a cannabis cigarette she had brought with her. She had no previous history of illegal drug use on school premises. Her 'free time' was withdrawn for 2 days and her parents were informed. She was warned that a second offence on the trip would lead to her being sent home at her parent's expense.

In the UK, responses to possession, use or supply of illegal drugs should be in keeping with the school/centre drug policy, taking account of the law and Child Protection considerations.

Staff Drug Use – Medicines

Visit leaders should ensure that they have relevant information about the medical needs of staff members. These records should be treated confidentially by the visit leader.

Staff members should ensure that their medicines are stored safely. It is expected that staff who use medication are aware of any effects on driving etc. and restrict their actions accordingly.

Staff Drug Use – Tobacco

Staff must be clear about the times and places they may smoke. The rules followed whilst on school/centre premises will usually be applied.

Staff should ensure that their behaviour in no way condones or encourages smoking.

Staff Drug Use – Alcohol

Staff alcohol consumption is an issue to be discussed and agreed in the planning stage of a residential visit.

The key points are:

- The effect of alcohol on health and safety of self and others
- The effect of alcohol on decision making ability
- What constitutes being 'off duty'
- Staff members being to return duty.

Young people should always be supervised by alcohol-free staff, whether this is direct or remote supervision.

Staff Use of Alcohol

What is the view of the Head on staff use of alcohol on an educational visit?

Is there a school/centre policy consistent with County Council' Policy on Alcohol, Drugs and Other Substance Misuse at Work?

What process will you use to consult staff about decisions and communicate these to staff members before you go?

A meeting may be held to discuss a wide range of issues relating to the visit.

Does the length of the visit affect the decision?

If the visit is short, staff may not wish to use alcohol.

Decision Making with Colleagues

Will there be any staff who will not be drinking alcohol during the trip?

A rota established, so that staff members have a clear understanding of when they are on and off duty. At all times, there should be the required levels of supervision by alcohol free staff.

How will you ensure that these staff members are not given additional, unexpected responsibilities?

How will we ensure that working relationships are not put under strain?
If we drink alcohol, how will supervisory responsibilities be organised?

Is it acceptable to drink alcohol in front of young people? If so, what are the restrictions?

It may be decided that a glass of wine during a meal is acceptable. This may be interpreted as modelling sensible drinking.

Staff Drug Use - Illegal Drugs

Every school/centre visit should be free from illegal drug use. Illegal drug use by staff will be considered a disciplinary matter.

A staff member must always be capable of fulfilling their duties. This is especially relevant when responsible for the pastoral care and health and safety of young people. Use of illegal substances whilst staffing an educational visit may also threaten the image of the school/centre and the County Council and adversely affect working relationships.

The Disability Discrimination Act and educational visits

This section offers guidance to schools/centres on including young people with a disability in educational visits, residential courses and field trips.

Special Educational Needs and Disability Act & the Disability Discrimination Act

The Special Educational Needs and Disability Act (SENDA) 2001 amends the Disability Discrimination Act 1995 to prevent discrimination against disabled people in their access to education. It sets out clearly the duty to ensure that education and associated activities (including educational visits) in schools/centres are accessible for all young people. The Disability Discrimination Act 1995 states that it is unlawful:

- to treat a disabled pupil or prospective pupil less favourably for a reason relating to his or her disability than someone to whom that reason does not apply **without justification**; or
- to fail to take **reasonable steps** to ensure that disabled pupils or prospective pupils are not placed at a substantial disadvantage in comparison with non-disabled pupils **without justification**. This is known as the reasonable adjustments duty.

In other words a balance is needed, and as is often the case where a Duty of Care is involved it can be complex and ultimately only a court may be able to decide. Potential conflict arises when there is an argument that to include a particular person on a particular visit may result in harm to themselves or others. The visit leader may argue that their principle duty is to ensure the safety of all participants, (i.e. the Primary Risk). Local Authorities also have this duty but they also have a duty to implement SENDA (i.e. a Secondary Risk.) Local Authorities and individual schools and leaders would do well to keep in mind which are primary risks and which are secondary risks.

What is a disability?

A person has a disability if he or she has a physical or mental "impairment" that has a "substantial" and "long-term" "adverse" effect on his or her ability to carry out "normal day-to-day activities". NB young people who have had, but no longer have, a disability are also protected from discrimination.

What does this mean?

"Impairment" – includes sensory difficulties, for example, sight or hearing difficulties.

"Mental impairment" – covers a range of impairments relating to mental functioning, including "learning difficulties".

"Substantial adverse effect" – an effect that is more than minor or trivial.

"Long term" – has lasted 12 months or more, or is likely to last at least 12 months or is likely to last the rest of the person's life.

"Normal day-to-day activities" – those that people carry out often and regularly, such as:

- mobility (moving around)
- manual dexterity (using your hands)
- physical co-ordination
- continence
- ability to lift, carry or move everyday objects
- speech, hearing or eyesight
- memory or ability to concentrate, learn or understand
- understanding the risk of physical danger

Conditions that will **not** normally be treated as disabilities include being short-sighted, having broken arms or legs, hay fever and addiction to alcohol, nicotine or drugs. The Disability Discrimination Act 2005 has extended the definition to include people with HIV, Multiple Sclerosis and some forms of cancer.

NB. Remember that the above definition of a disability includes young people who have been diagnosed with ADHD.

What is less favourable treatment?

A school/centre discriminates against a disabled child if for a reason relating to the child's disability, it treats him less favourably than it treats, or would treat, others to whom that reason does not apply, or would not apply; and it cannot show that the particular treatment is justified.

In effect this means that there are three questions to be asked in determining whether unlawful discrimination, in relation to less favourable treatment, has taken place;

- is the less favourable treatment for a reason that is related to the child's disability?
 - is it less favourable treatment than someone gets if the reason does not apply to him/her?
- And
- is it less favourable treatment that can be justified?

What is a reasonable adjustment for an educational visit?

Schools/centres must take reasonable steps to make sure that disabled young people, including children who are not yet at the school/centre but who might join the school/centre, are not placed at a substantial disadvantage compared with their non-disabled peers without justification. In other words, a school/centre should do everything it reasonably can to ensure that a disabled young person is not placed at a substantial disadvantage.

Therefore, consider what is required for the disabled young person to participate and then ask, is that reasonable? If it is they must be included. If it is not they do not need to be included. Ultimately only a court can decide which it is.

You can find out more about what it is reasonable from the Disability Rights Commission (DRC) who have produced a Code of Practice for schools, which provides examples of how schools can help disabled young people. Some of these examples appear at the end of this section. The Code of Practice for Schools can be found at www.drc-gb.org.

The Acts do not define "reasonable" – this depends on individual cases. However, schools/centres can take account of the:

- need to maintain academic and other standards
- financial resources available
- cost of taking a particular step
- practicality
- aids and services provided by Statement of Special Educational Needs
- health and safety requirements
- the interest of other young people

Schools/centres are not under a duty to provide **auxiliary aids or services**. Special educational provision in the child's statement should provide any educational aids and services where these are necessary to meet the child's identified needs. Where a child has been provided with an auxiliary aid, the school/centre should consider its use in relation to the visit. For example, where a radio microphone is used in the classroom for a deaf child, organisers should consider how its use will be adapted for the visit.

Remember, reasonable adjustments are anticipatory – which means that schools/centres cannot wait until a case arises to consider reasonable adjustments. Failure to take anticipatory action could lead to unlawful discrimination, because delays that result could place a disabled young person at a substantial disadvantage. Anticipatory steps could be:

- the review of the school's/centre's policy/practice with regards to educational visits
- the training of staff to administer medicines to young people
- an equal opportunities policy concerning disability, and its publication as part of the school's prospectus
- the inclusion of disability awareness training within the staff training programme
- work with Schools Medical Officer and Educational Psychologist to devise a list of common disabilities and identify the potential adjustments required to enable participation in educational visits

Not taking "reasonable steps" to avoid putting young people at a substantial disadvantage can only be justified if there is a reason which is both material to the particular case and substantial. For the reason to be material there has to be a clear connection between the reason that the school gives and the circumstances of the particular case. The reason also has to be substantial, that is, one that is more than minor or trivial.

Schools/centres should contact the LA for further advice on disability issues in all cases where the legal position is unclear. The first point of contact should be the Outdoor Education Adviser.

Suggested questions to ask yourself when planning the visit

1. Are you clear about the purpose of the visit?
2. Are there young people with a disability participating in the visit? If so, have you consulted with parents/carers and your SENCo regarding the young peoples' needs and their requirements in order to participate?
3. If a young person with a disability is participating in the visit, have you taken into account staff, services, additional costs and equipment available to the young person, and required by them, to participate in the visit?
4. Are there any health and safety issues for the young person in accessing the proposed visit. Are these included in the risk assessment of the activity/visit?
5. Can any concerns regarding the safety and accessibility of the activity be addressed by reasonable adjustments, such as:

- careful timetabling/modifications to the itinerary
- preparing the young person prior to the visit
- specialised transport
- additional, or targeted, adult support
- liaison with health professionals in the locality of the trip/visit
- limiting distances to be walked
- liaising with establishments, e.g. museums, regarding toilet facilities, ramps, quiet/withdrawal areas etc.
- staff with necessary training in disability and/or medical needs to support the young person during the visit
- preparation of materials prior to the visit in appropriate formats

6. Do you need specialist advice regarding accessibility, adaptations and strategies and/or medical requirements? E.g.:

- Hearing Support Service
- Visual Impairment Service
- Educational Psychology Service
- Student Assessment Service including the Occupational Therapists based with the Service
- Schools Medical Officer

What if

.....**after** careful and thorough consideration, participation for all young people in the visit cannot be ensured? You will need to be able to demonstrate clearly why that is the case, or you may be acting unlawfully. Important factors will include:

- all reasonable measures have been considered/taken to support the disabled young person's participation in the event
- there is no alternative activity that would meet the requirements of the educational visit as well as enabling all young people to participate
- disabled young people who are disadvantaged because their needs prevent participation in an event have been fully consulted (as well as their parents) and all reasonable steps have been explored
- the visit must take place despite the disadvantage to a young person because if the visit did not take place this would disadvantage all young people
- alternative activities have been discussed and offered to those young people who are unable to participate in the visit
- there is a reason which is both material to the circumstances of the case and substantial which amounts to the justification of a young person with a disability not participating in a particular educational visit
- there is no blanket ban on a young person with a disability participating in activities/visits

All of the above should have been considered **BEFORE** any arrangements are finalised and bookings/deposits paid and letters sent to parents.

Partnership

It is of paramount importance that any young person with a disability, and their parents/carers, are involved in the discussions and planning of the educational visit as early as possible. Working together will lessen the opportunity for misunderstanding and concerns to arise that may result in a claim of discrimination against the school/centre, and, more importantly, ensure that young people with disabilities participate alongside their peers in educational visits.

Examples

The following examples are taken from the Disability Rights Commission's Code of Practice for Schools and help to demonstrate the practical application of the act with regards to educational visits.

1. A pupil with Tourette's Syndrome is stopped from going on a school visit because he has used abusive language in class. The school has a policy of banning young people from trips and after-school activities if they swear or are abusive to staff.

The reason for not allowing the pupil to go on the school visit is his use of abusive language. His involuntary swearing is a symptom of his Tourette's Syndrome. This is less favourable treatment for a reason that relates to the pupil's disability.

The comparison has to be made with others who had not used abusive language. In this case, the pupil who used abusive language, which is directly related to his disability, was treated less favourably than young people who had not used abusive language. So, for a reason that relates to his disability, this boy is being treated less favourably than another child to whom that reason does not apply.

Is the less favourable treatment justified? In this case the school might argue that the inclusion of the disabled pupil on the visit would make the maintenance of discipline impossible. This may constitute a material and substantial reason. However, the school would need to have considered the extent to which the disabled pupil's behaviour could have been managed. It would also need to have considered whether reasonable adjustments could have been made to its policies and procedures before it could attempt to justify less favourable treatment.

2. Some young people from a special school are going to the theatre. The school does not offer the trip to a pupil with learning difficulties on the basis that he would not understand the play. Is this less favourable treatment for a reason related to the pupil's disability?

The reason for not offering the boy the opportunity to go on the trip is his limited understanding which is directly related to his disability.

Is it less favourable treatment than someone gets if the reason does not apply to him or her?

The treatment that he was to receive has to be compared with the treatment that other young people would receive who did not have limited understanding. They were being offered the trip.

Is it justified? The reason for not offering the trip was an assumption that the boy would not understand the play. This was a general assumption and not a material reason. This is likely to be unlawful discrimination.

3. A pupil with cerebral palsy who uses a wheelchair is on a trip with her class to an outdoor activity centre

The teachers arrange to take the class on a 12-mile hike over difficult terrain but, having carried out a risk assessment, they decide that the pupil who uses a wheelchair will be unable to accompany her class, for health and safety reasons.

Is the less favourable treatment for a reason that is related to the pupil's disability?

This is less favourable treatment for a reason that relates to the pupil's cerebral palsy, namely the use of a wheelchair.

Is it less favourable treatment than someone gets if the reason does not apply to him or her?

The treatment that she was to receive then has to be compared with the treatment that the others would receive who did not use a wheelchair. They were being offered the opportunity to go on the hike whereas this pupil was being denied it.

Is it justified?

The school is likely to be able to justify the less favourable treatment for a material and substantial reason: a risk assessment, carried out in relation to this particular pupil in the particular setting in which she would have to travel, indicated that the health and safety of the pupil, and her classmates, could be jeopardised if she were to attempt the hike. This is likely to be lawful.

4. A secondary school takes pupils to an outdoor education centre each year. The school can benefit from a reduced rate if they book with the same centre for three years. The school checks with the centre before booking to ensure that if they were to take disabled pupils as part of a group they would be able to access the facilities of the centre. This is likely to be a reasonable step that the school should take.
5. An exchange trip is offered to pupils studying Italian in a secondary school. Accessible transport arrangements are made and a suitable host is identified who can accommodate a pupil who uses a wheelchair. At the last minute the Italian host drops out.

The school went through the following considerations:

- It was not practicable to take the disabled pupil without a host to go;
- The school considered cancelling the trip, but if the other pupils did not go they would lose the opportunity of improving their Italian.

In the interests of other pupils the school decides to go ahead with the trip. The school has considered the factors and, whilst it has not been able to identify a reasonable adjustment that would enable the pupil to go on the trip, it is likely to be acting lawfully.

6. The parents of a nine-year-old boy with epilepsy ask the Head teacher to keep confidential the existence of and the nature of their child's disability. Their son's medication has been effective in reducing the number of fits that he has and he is unlikely to have a fit in school. However, on seeking professional advice the Head teacher is told that it would be unsafe for the boy to go swimming without informing the staff at the pool. The parents do not want them to be told. The Head teacher decides that the safety of the child dictates that he should not go swimming unless staff at the pool can be told. This is likely to be lawful.

7. A school will only agree to a disabled pupil coming on a field trip if the parents sign an agreement stating that they do not hold the school responsible for making any adjustments which may be necessary to ensure that the pupil benefits from the planned activities on the trip and will not take any action if the pupil is excluded from activities. It is likely that the agreement is not legally binding.

ANNEX 10

Overseas expeditions organised through an independent provider

Acknowledgements

This section sets out common minimum standards for expeditions that are in line with current good practice, based on the following:

- Guidance for overseas expeditions prepared by Clive Atkins of *Clive Atkins Consultancy Ltd*.
- Outdoor Education Advisers Panel guidance on overseas expeditions 2002;
- Previous Assembly Government guidance;

A Compliance by the overseas expedition provider

In advance of making a booking, the school/centre should forward a copy of this section (Annex 10) of the guidance to the intended provider (A.1).

The provider is asked to confirm full compliance with this section (Annex 10, Educational visits) in writing to the school/centre (A.2).

If this is forthcoming the school/centre may apply for outline LA approval (Annex 10, [form OE 1](#)), and if granted may subsequently enter into a contract with the provider (A.3).

Where this is not possible, the provider is asked to indicate any areas of potential non-compliance, and these must be agreed or resolved to the satisfaction of the LA prior to a contract being made (A.4).

In order to do this, the school/centre should discuss any areas of non-compliance directly with the provider, and if appropriate with the Outdoor Education Adviser (A.5).

Please note that non-compliance does not necessarily mean that the expedition will not be approved by the LA. Rather, the purpose of this procedure is to highlight and resolve any potentially contentious issues at an early stage in the planning process and before a commitment is made (A.6)

Where a significant amendment to this section of the guidance is made subsequent to agreement by a provider, then the Outdoor Education Adviser will discuss the implications of the amendment directly with the provider (A.7).

B Terminology

The following terms are used in this section of the guidance:

School/centre leader - the named member of staff employed by the LA, and designated by the Head and EVC to be the school's/centre's visit leader. Also the 'pastoral' leader (B.1)

Expedition leader - the named (senior if more than one) leader from the third party provider, organisation or tour operator. Normally the 'technical' leader (B.2)

Provider - the third party agency, commercial company, or tour operator employed by the school/centre (B.3)

Staff - any adult from either the school/centre or the provider that is involved in the venture, who is not a student at the school/centre. This would include expedition 'assistants', or volunteers (B.4)

EVC - the Educational Visits Coordinator of the school/centre (B.5)

Note: Unless this is an agreed joint venture between two or more school/centres, other adults or young people may only be included in the expedition if they:

- are part of the school's/centre designated group (B.6) **or**
- are a designated representative of the school/centre or LA (B.7) **or**
- are an employee of the provider (B.8) **or**
- are engaged by the provider in a supporting or training capacity (B.9).

C Target Expeditions

'Overseas expeditions' typically take place in remote areas of the world and/or in developing countries, both of which present significant hazards and organisational challenges not normally encountered in the UK or Europe (C.1).

This guidance is targeted at an expedition that:

- in essence remains a school/college/youth group expedition
- is developed or commissioned as an educational package for the under 19's
- has trekking into remote areas as a component, which may involve fieldwork and community projects
- visits or journeys through one or more challenging environments (N.B. 'challenging' as compared to the current experience of the young people concerning high mountains, jungle, deserts or similar)
- is placed in a considerably contrasting culture(s) to those of the participants
- is designed to be of a team building nature
- raises young peoples' awareness and skills in assessing and managing risks.

It is not:

- an individual or small independent group's self led expedition
- an over 18's expedition
- an extreme challenge in hazardous environments
- an expedition requiring the young people to manage unknown risks; making decisions without training or relevant information; or to manage known risks without the support of a competent leader.

D **Recommended Time-Scale**

12-18 months before the venture	<p>Proposal initiated (D.1)</p> <p>School/centre Leader recommended to attend a Royal Geographical Society 'Overseas Expeditions' Course (D.2)</p> <p>Several companies approached (D.3)</p> <p>Teacher/youth worker leader(s) identified (D.4)</p> <p>Current provider risk assessments/research made available (D.5)</p> <p>School/centre to request and obtain outline LA approval (Form OE1) (D.6)</p> <p>Group formed (D.7)</p> <p>Communication with parents/carers (D.8)</p> <p>Area/Location(s) proposed (D.9)</p> <p>Itinerary options outlined (D.10)</p> <p>Approval framework agreed eg leadership team requirements (D.11)</p> <p>Contract agreed with provider and deposit forwarded (D.12)</p>
Continuous preparation	<p>Outdoor Education Adviser to contact EVC and school/centre Leader (D.13)</p>
Group liaison & communication	<p>Research continues (D.14)</p> <p>Group training programmed (D.15)</p> <p>Contact with major agencies, eg. RGS (D.16)</p>
4 months minimum (ideally 6 months)	<p>Expedition leader confirmed and agreed (D.17)</p> <p>All final details agreed (D.18)</p> <p>Training programme and preparation underway (D.19)</p> <p>Medical and other requirements completed (D.20)</p> <p>Specific risk assessment prepared (D.21)</p>
If issues still exist beyond that date	<p>Agree alternative location (D.22)</p> <p>Agree different Expedition Leader (D.23)</p> <p>Consider postponement (D.24)</p> <p>Cancellation (liaise with company over liability) (D.25)</p>
8+ weeks before	<p>School/centre requests meeting with LA representative (Annex 10, form OE 2), and</p> <p>Final LA approval (D.26)</p>

Note: A shorter timescale may be appropriate for certain shorter duration expeditions that take place 'closer' to home, eg Europe, Morocco, etc (D.27)

E Purpose of expedition

As with any other Educational Visit, the venture must have clearly defined educational aims, which are appropriate to the needs of the group generally, and to individuals within the group specifically (E.1).

The school/centre must consider whether these aims could be met more easily through a venture closer to home, for example in the UK or Europe, and if so should investigate this option (E.2).

F Responsibilities

There must be clarity amongst all parties as to where the responsibility lies for each aspect of the venture, for example the preparatory stages, training programme, itinerary, transport, accommodation, rest & relaxation periods, etc. (F.1). These responsibilities will lie with the provider, the school/centre, or the LA (F.2). Some aspects will be delegated, for example, to the expedition leader or school/centre leader (F.3).

There will be many occasions where liaison between various parties is essential (F.4), but there will be few occasions where the (legal) responsibility is shared (F.5). Areas of shared responsibility should be identified, clarified and documented in advance of the venture (F.6).

G Selection of provider

The school/centre should consider a number of providers prior to the selection of a specific one (G.1). This is primarily in order to ensure:

- best suitability of provision (G.2)
- that best value is obtained (G.3)

It is the school's/centre's responsibility to determine the suitability of a chosen provider (G.4), and the school/centre must have a clear rationale for its choice (G.5).

The LA does not recommend or approve overseas expedition providers (G.6).

H LA approval

LA approval is in two stages:

- Outline LA approval must be obtained prior to the school/centre making a commitment with a provider (H.1). The school/centre should forward [Form OE1](#) to the LA after consultation with the intended provider. Outline approval will normally be granted within two weeks where the provider has agreed in writing to this LA guidance (Annex 10, Educational Visits) (H.2). Where a provider has indicated non-compliance with any aspect of the guidance, then the

school/centre must contact the Outdoor Education Adviser in order to consider the issues concerned, **and must not enter into a contract with the provider.** (H.3). After granting outline approval the Outdoor Education Adviser may arrange a meeting with the school/centre leader and EVC (H.4).

- Final LA approval will be granted when all aspects of the venture have been addressed appropriately (H.5). The school/centre should forward [Form OE2](#) to the LA (usually no less than 8 weeks prior to departure) (H.6). Upon receipt the Outdoor Education Adviser may arrange a further meeting with the school/centre leader and EVC prior to granting final approval (H.7).

Note: The LA approves the expedition, not the provider.

I Insurance

The level of insurance provision must meet LA requirements. The school/centre must check the insurance cover offered with their LA insurance section prior to making a commitment to the venture (I.1).

The following must be included within the overall insurance provision:

- The Provider must have Public Liability insurance in place for all participants, including the leadership team and the support team (I.2).
- The Provider must ensure that any third party provider that they might use has appropriate insurances in place (J.3).
- Medical insurance must include: emergency assistance and repatriation (including air ambulance and air transport costs) (J.4); emergency dental treatment (J.5); travel and accommodation expenses for a minimum of one person who has to travel to, or remain with, or escort an incapacitated or injured participant (J.6.)

J Contracts & Legal Issues

There should be a written contract between the school/centre (on behalf of the young people and their parents/carers) and the commercial company (J.1). This contract should be similar to the contracts placed with other commercial providers, which agrees to the conditions as set out generally in the provider's brochure and for any specifications unique to the particular location or activity (J.2).

School/centre staff accompanying the expedition must do so as employees of the LA/school/centre and should not sign a separate contract with the Provider (J.3).

As with other visits the school/centre should retain financial control of the contract by collecting monies due in staged payments from the young people and paying the company directly through the school/centre accounting procedures (J.4).

Wherever possible, contract should not be signed between parents/carers and the Provider. If parents /carers do sign separate contracts with the Provider they should be advised that the school/centre/LA still has a Duty of Care with regards to the venture. (Certainly if something were to go wrong the school/centre/LA would have great difficulty in avoiding criticism.) Whilst no

contract may exist between the school and the provider the school/centre/LA should at least advise parents of their **opinion** of the visit, and whether they believe it is being organised appropriately. Good practice suggests close cooperation between provider and the LA, even though no contract may exist between them (J.5).

The provider should illustrate the financial systems that exist to protect all aspects of the expedition's finances, including training weekends, etc (e.g. bonding) (J.6).

The commitment by the provider to adhere to this section of the guidance (or any variation/s agreed between the LA and provider) is central to LA approval (J.7). Where a provider revokes on a significant previously agreed arrangement (for example, if the provider is unable to supply an expedition leader with the previously agreed level of competence) and it is not possible to resolve the matter to the satisfaction of the school/centre and LA, then the school/centre reserves the right to cancel the venture (J.8), but see also J.9. There may be occasions where it is appropriate to make reasonable allowances for work carried out up until cancellation (J.9).

The provider's cancellation policy should be 'fair and reasonable' (J.10).

K School/centre leader and school/centre staff competencies & training

The school's/centre's Educational Visits Coordinator should assess the general competence of the designated school/centre leader and any other supporting school/centre staff (K.1).

Prior to making a commitment to the expedition, school/centre staff should liaise with the provider in order to ensure that young people and teachers/youth leaders have the required level of fitness (K.2).

The school/centre leader should hold a first aid qualification (K.3).

It is recommended that the school/centre leader has travelled abroad before, and attends the one-day 'RGS overseas expeditions and fieldwork course' (see L) (K.4).

School/centre staff should receive appropriate expedition specific 'training' by the provider (K.5).

Pre-expedition training courses for staff are encouraged; however incentives (such as ski-trips) that are not relevant to the expedition process itself should not be used during the sales process (K.6).

The Educational Visits Coordinator must consider the implications that would arise in the event that the designated School/centre Leader is unable to participate in the expedition (e.g. through job change, illness or injury), and must put in place appropriate contingency plans to allow for this eventuality (K.7).

L RGS overseas expeditions & fieldwork course for teachers and youth workers

It is recommended that the school/centre leader attend this one-day course (L.1).

The course is organised by the Royal Geographical Society and endorsed by the Outdoor Education Advisers' Panel, and is held at venues throughout the country (L.2).

The course programme includes the following (L.3):

- Setting educational objectives for your expedition
- Initial research: where to go for information, advice and inspiration
- Competence, leadership and supervision
- Expedition planning and administration
- Risk assessment and safety management
- Good practice guidelines
- Contingency and emergency planning
- Training and medical preparations
- Evaluation and reports

Ideally this should take place before selecting a provider, however it is acknowledged that this may not always be possible (L.4).

For further information contact:

Expedition Advisory Centre, Royal Geographical Society, 1 Kensington Gore, London, SW17 2AR.
Tel. 020 7591 3030 Fax. 020 7591 3031 e.mail eac@rgs.org www.rgs.org/eac

M Information to parents/carers & parent/carer consent

Parents/carers should be invited to a meeting with the school/centre and the provider, prior to being invited to make a commitment to the venture (M.1). Clear and detailed information must be given to parents/carers (M.2). This is both the school's/centre's responsibility and the provider's (M.3). Parent/carer consent must be based on a full understanding of the expedition characteristics and programme (M.4). This information should include:

- ALL planned or possible activities, including any contingency activities (ie Plan B) (M.5)
- rest & relaxation periods (M.6)
- supervision arrangements (M.7)
- codes of practice (M.8)
- communication systems during all stages of the expedition (M.9)
- the pace and level of intensity of the expedition (M.10)
- injury, illness, incident, emergency and evacuation procedures (M.11)
- insurance arrangements (M.12)
- transport (M.13)
- accommodation (M.14)
- likely additional costs to participants, e.g. clothing, inoculations, visas, spending money, etc (M.15)

It is recommended that it is explained to parents/carers that, whilst every step will be taken to ensure the safety of the young people, such activities are by their very nature potentially hazardous (M.16). It is important to identify the risks and have them acknowledged by parents/carers on a fully informed basis. Of course this should be set against the benefits of the visit and against the (good) safety record of the school/provider on such visits (M.17).

As with any other educational visit, it is the responsibility of the school/centre to request and retain details of parent/carer consent (M.18). Where appropriate, the school/centre must liaise with the provider regarding relevant matters, for example medical issues, swimming ability, etc (M.19).

N **Planning**

Visit leaders should also refer to the section on risk management in [Section C9](#) of this guidance.

Written plans must cover all stages of the expedition programme (N.1). They should be current, and prepared by someone with an appropriate level of competence and experience (N.2), and must include:

- all activities, including possible activities, and contingency plans (N.3)
- route choices (N.4)
- transport (N.5)
- accommodation, including suitability, security, safety precautions, and emergency evacuation (N.6)
- rest and relaxation periods (N.7)
- emergency procedures and evacuation (N.8)
- any other areas where a known significant hazard exists (N.9)
- culture: including food/drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information (N.10)

The generic visit plans should be prepared by the provider at an early stage in the planning process, and prior to the school/centre and parents/carers making a commitment to the venture (N.11).

In the final stages of planning, these generic plans should be supplemented where appropriate with specific plans (N.12). This process is the responsibility of the expedition Leader, following liaison with the school/centre Leader (N.13). It must take place before the commencement of the expedition, but by definition can only take place when:

- training sessions have been completed (N.14)
- the expedition leader has been appointed (N.15)
- the medical information of participants is known (N.16)
- participants' fitness levels, etc have been assessed (N.17)
- other relevant information about participants is known (N.18)
- the current situation in the country to be visited is known (eg political, etc) (N.19)

Where young people are required to make decisions (eg. regarding accommodation, transport, guides, etc.) all risk assessments must have been carried out in advance by the provider, although

this may be unknown to young people (N.20). (The journey into the unknown should only apply to young people, not to staff).

Dynamic risk management:

Risks must be monitored throughout the visit and where appropriate activities modified or curtailed to suit changed or changing circumstances (N.21). The responsibility for this rests primarily with whoever has the principal duty of care of the participants at the time. Where more than one person has a duty of care each must be made aware of this and liaise with each other (N.22). See also Section Q: leader competencies.

O External reports/BS 8848/ post-expedition reports

External reports

Contractors should provide details of any independent, inspection-based external verification. These should be forwarded by the provider to the school/centre prior to the school/centre making a commitment to the venture (O.1).

BS 8848

Conformance with BS 8848:2007 British Standard: *'Specification for the provision of visits, expeditions, and adventurous activities, outside the United Kingdom'* is not a requirement but is a useful adjunct (O.2). Providers claiming conformance should include on of the following statements in their documentation, depending upon the basis of this claim (O.3.):

- a) **If Certification:** "Venture provided by [include unambiguous identification of the entity acting as venture provider] to BS 8848, *'Specification for the provision of visits, expeditions, and adventurous activities, outside the United Kingdom'* [identification of certifying body] certified"
- b) **If Other-party assessment:** "Venture provided by [include unambiguous identification of the entity acting as venture provider] to BS 8848, *'Specification for the provision of visits, expeditions, and adventurous activities, outside the United Kingdom'* [identification of assessment body] declared"
- c) **If Self-assessment:** "Venture provided by [include unambiguous identification of the entity acting as venture provider] to BS 8848, *'Specification for the provision of visits, expeditions, and adventurous activities, outside the United Kingdom'* [identification of assessment body] self declared"

Independent screening

The Young Explorers' Trust runs an independent screening process for the plans of youth expeditions, and awards its approval to the plans of those expeditions which reach the required standard. Providers are recommended to enter into this process, or demonstrate systems of equivalent robustness (see www.theyet.org) (O.4)

Viewing of post expedition reports

The school/centre leader should request sight of any post-expedition reports from similar expeditions (O.5), and where possible the provider should make those considered to be of most use available to the school/centre (O.6).

Evaluation

On completion of the venture, the Provider shall ensure that:

- a) an evaluation is undertaken which includes comment on any significant issues and reference to the stated aims and objectives (O.7);
- b) All participants are provided the opportunity to contribute to such evaluation (O.8);
- c) Where indicated, the Provider's systems and procedures are reviewed, and revised to take account of any matters arising and lessons learned from the evaluation (O.9).

On completion of the venture, the School/Centre shall ensure that:

- a) An evaluation is undertaken which includes comment on any significant issues and reference to the stated aims and objectives (O.10);
- b) All participants are provided the opportunity to contribute to such evaluation (O.11);
- c) Feedback is given to the Provider (O.12);
- d) Where indicated, the school's/centre's systems and procedures are reviewed, and revised to take account of any matters arising and lessons learned from the evaluation (O.13)

P Preparation of young people & fitness

Unless the nature of the visit suggests otherwise, a training and induction programme (for example, including hill walking and carrying packs) should be planned for all participants including staff, and monitored jointly between the provider and the school/centre leader (P.1) to identify and improve:

- appropriate levels of fitness for the expedition (P.2)
- group dynamics and team work (P.3)
- personal confidence in the skills required (P.4)
- risk assessment and risk management awareness (P.5)

There must be sufficient flexibility within the expedition programme to allow for variations in final fitness levels (P.6).

Q Leader competencies

It is essential that the technical and pastoral aspects of the expedition leadership are understood (Q.1):

- **Technical competence** To plan, lead and manage activities undertaken in an active, on-going risk management context. This is normally the provider's expedition leader. This person would have the level of experience and qualifications outlined in the 'Expedition leader matrix' (Q.2).

- **Pastoral competence** To manage the care, welfare and experience of young people successfully according to their age, experience and needs. This is normally the school/centre leader. This person would have a nationally recognised qualification: teacher or youth worker for example (Q.3).

Just as pastoral competence is developed through positive experience, technical competence must be complemented by the experience of making active judgements/risk assessments in realistic contexts, gaining and developing the leader's experience (Q.4). The LA recognises the importance of this process.

In all but technical decisions relating to the welfare of the group, it is normally the (pastoral) school/centre leader who has the final say (Q.5) for example:

- the (technical) expedition leader may decide the group is not able to go on and explain their reasoning. The (pastoral) school/centre leader may ask for and challenge their reasons, but would not override any such technical decisions (Q.6)
- the (pastoral) school/centre leader may ask for an activity to stop, or request a rest or an alternative where their greater knowledge of the group health and welfare leads them to such a decision. The (technical) expedition leader may ask or challenge their reasons, but would not override any such decisions (unless there was a clear health and safety reason for doing so) (Q.7).

Should a leader have both technical and pastoral competence, they need to be very clear about their responsibilities (Q.8). Dual competence cannot mean a reduction in ratios, a competent assistant would be needed (Q.9).

R **Liaison with expedition leader**

Where the expedition leader is external to the group then sufficient time in training must be made available for that leader to:

- Become personally acquainted with the young people and their leaders to decide if they can work together (R.1), as well as to formulate aims and expectations (R.2).
- Make a proper assessment of individual (R.3), group (R.4), and assistant leader competences (R.5).

The expedition leader should be appointed to the group no less than 4 months (ideally 6 months) prior to the expedition (R.6), and work with the group soon after appointment, ideally as part of their training programme (R.7).

S **Expedition leader matrix**

The competence of the (technical) expedition leader is probably the single most important factor in

ensuring a successful and safe expedition (S.1).

The school/centre and school/centre leader are not normally specialist in the area of overseas expeditions, and as such cannot be expected to have the expertise necessary in order to assess the competence of the provider's designated expedition leader (S.2). Therefore this section is aimed primarily at the provider (S.3).

The matrix in Table 1 focuses on expeditions on foot. Where the matrix does not cover the exact terrain, activity or circumstances, the below principles must be applied (S.4).

The basic principles are that:

- the expedition leader should be able to demonstrate an appropriate level of competence, in line with current good practice (S.5).
- there should be evidence of that competence through an assessment or judgement, made by a person of sufficient status, qualification and/or experience to make that judgement, and be recognised as being able to do so (S.6).

Two principal routes are taken in this matrix:

1. Recognised qualifications PLUS additional experience and local knowledge. The matrix accepts and promotes the value of a base line of technical competence given by a national governing body award such as a mountain qualification (S.7). It also accepts that in these contexts this is insufficient without additional experience of the activities in the region concerned (S.8), and the need for essential local knowledge (S.9). These elements need to be seen as complementary requirements.
 2. Where there is no recognised qualification (in the specific terrain, region, or culture) then it is most important that the principals are applied as realistically as possible (S.10).
- Where is the evidence of current good practice/competency? For example, the person should be an expeditioner known to recognised expedition groups or major agencies. Their competence would have been evidenced by others able to make a judgement. (S.11)
 - The person(s) making the judgement would need to be nationally recognised or recognised by others of such a standing; or part of an organisation that has such a clearly recognisable standing (S.12). In the absence of the moderation of an award, this person should be external to the expedition group or company concerned (S.13). (Applying the principles in this way allow for a realistic comparison to the first route in terms of the consistency of judgements made).

If the provider is unable to meet the above criteria relating to the competence of the expedition leader then this must be discussed with the Outdoor Education Adviser, and resolved, prior to the provider entering into a contract with the school/centre (S.14).

Table 1 Expedition leader matrix

Statements of Competence may be an equally acceptable alternative to an NGB award, particularly where the award was not designed for that environment.

Activity	Terrain	Expedition Leader qualification	Expedition Assistant Leader qualification	Additional Experience	Essential local knowledge
Day treks and trekking to fixed or mobile camps	Walking terrain in summer conditions	Mountain Leader (ML) Award (Summer)	Assessed competence in this terrain eg ML (Summer) training where assessment of competence available or Walking Group Leader (assessed)	journeying or expeditioning in the region concerned	<ul style="list-style-type: none"> * the availability and efficiency of: <ul style="list-style-type: none"> - transport systems - medical facilities - emergency support - guides - accommodation * local culture: <ul style="list-style-type: none"> - advantages/issues - crime - gender - religions <p>Important note: Jungle travel <i>In order to obtain an equivalent to the 'assessed competence' in other activities, an MoD qualification or similar endorsement would be required from a recognised source, which in turn would need to be able to provide evidence of their ability and experience to make such an assessment. (This could be true of other journeying, eg arctic travel.)</i></p>
Day treks and trekking to fixed or mobile camps	Scrambling terrain requiring the use of ropes or fixed cables; in summer conditions	Mountaineering Instructor Award (MIA)	MIA training or ML (Summer) plus SPA	journeying or expeditioning and scrambling in the region concerned	
Day treks and trekking to fixed or mobile camps	Walking terrain above the snow line (non glacial)	ML (Winter) or European Mountain Leader (EML) Award where a winter component has been assessed	ML Winter training EML training with winter component	journeying or expeditioning in the region concerned	
Day treks and trekking to fixed or mobile camps	Scrambling terrain requiring the use of ropes or fixed cables including snow and ice conditions (non glacial)	Mountaineering Instructor Certificate (MIC)	MIA with Winter ML	good awareness of the region and its scrambling routes	
Day treks and trekking to fixed or mobile camps	Mountaineering requiring the use of ropes or fixed cables including glaciated snow and ice	UIAA Mountain Guide	MIC	good awareness of the region and its mountaineering routes	

Activity	Terrain	Expedition Leader qualification	Expedition Assistant Leader qualification	Additional Experience	Essential local knowledge
Day treks and trekking to fixed or mobile camps	Jungle travel	Suitable MoD qualification or specific evidence of competence	Suitable MoD qualification or specific evidence of competence	journeying or expeditioning in the region concerned	

T First aid competencies

The Expedition Leader must hold current first aid qualification, which is appropriate for the nature of the visit and the environment being visited. (T.1).

The school/centre leader should hold a first aid qualification and any supporting school/centre staff should, as a minimum, possess 'a good working knowledge' of first aid (T.2).

U Ratios

Ratios will vary considerably, based on risk assessments in the particular environment and if the technical/pastoral roles are split (U.1). The major considerations are:

- A minimum of two leaders (see technical/pastoral comments) at all times, at least one of whom must be from the school/centre (U.2)
- A staff/student ratio in line with current good practice for similar expeditions, taking into account all variables, e.g. route, participants, possible weather conditions, plan B, emergency procedures, competence of staff, equipment, etc. (U.3)
- A balance of gender to reflect the group (U.4).

V Emergency communications

The provider must use the most suitable emergency communication system that is active in the region(s) to be visited (V.1). Where mobile or satellite phones are known to operate in a region then this is the preferred choice (V.2). In remote locations, where there is only partial phone coverage, then this must be supplemented by another form of emergency communication, such as radio net and runner (V.3).

W Emergency procedures and evacuation

Written and agreed emergency procedures and contingency plans should be fully understood by all involved in the expedition (W.1). It is the responsibility of the expedition leader and provider to ensure that appropriate emergency and evacuation procedures are in place (W.2). As part of this, it is essential:

- to have an accurate knowledge of the scope and limitations of the rescue services before making a decision on the viability of an area or specific route and its suitability for the group concerned (W.3).
- to understand the full implications of any individual or group evacuation if an incident or injury occurs (W.4). The evacuation of a student will require an accompanying teacher/youth worker (W.5), which has implications for the remaining group.
- that in the risk assessment of an area or route that the rescue and evacuation procedures are fully considered (W.6). Where a life-threatening injury or illness could not be evacuated with some efficiency and effectiveness, then the area is inappropriate (W.7).

- that the assistant leader's competence should be sufficient to successfully apply the emergency or incident management strategies should the leader become incapacitated (W.8).

X Other adventure activities

The expedition leader is responsible for all adventure activities (X.1), unless a member of **school/centre** staff has been specifically approved by the Outdoor Education Adviser in advance (see Section P LA approval procedures).

Y Remote supervision

The presumption will be that young people will be directly supervised unless expressly agreed otherwise (Y.1). Should the aim of the expedition include more self-reliant activity, the decision to move to indirect supervision must only be made on observed evidence of the competence of the group (Y.2).

Indirect supervision still requires considerable thought. It may be possible to monitor the group from a distance and intervene quickly and directly if required (Y.3). This may not always be the case and systems of 'buddying' etc. may need to be employed (Y.4).

Z The use of guides

The ultimate responsibility for the selection and use of guides rests with the provider/expedition leader, even though the young people and school/centre leader may be involved in the process (Z.1).

If the use of guides is to be considered as a part of the leader competency in that they supply some local knowledge, then the following questions must be asked as far as is practical:

- Where is the evidence of current good practice/competency of the actual guides to be used? (Z.2)
- Are they a recognised company or individual guide? (Z.3) Have they been used before and to what effect? (Z.4) Evidence would need to be collected, in particular where there is no recognised guiding system (Z.5).
- Guides are normally employed for specific route-finding and technical knowledge, **and should not have any direct pastoral responsibility** (Z.6).
- It needs to be remembered that a good guide can complement the expedition leader, but must not replace the expedition leader (Z.7).
- Where there is not good evidence of their competence, then the expedition leader should have sufficient experience and local knowledge to manage without a guide (Z.8). This must be considered before routes are agreed (Z.9).
- Where an additional risk assessment is required to manage changing circumstances such as weather, fitness, injury, local conditions, etc. the expedition leader must satisfy him/herself that the guide and local information are of sufficient quality for them to go ahead (Z.10), or the

expedition leader must use an already planned contingency alternative (Z.11).

AA The use of porters

Where the length of the expedition requires porters to support the carrying of equipment, the expedition leader must ensure that sufficient numbers are available (AA.1).

The experience and fitness of the young people allied to the demands of the terrain, environment and weather should determine the weight of the pack or load they can carry (AA.2).

BB Child protection

Written child protection procedures should be available and evidence of policies in action, e.g. Criminal Records Bureau (enhanced disclosure)/List 99/male-female leader ratios for mixed groups/accommodation/camp security (BB.1). Other individuals joining the group in-country who have not been CRB checked must not have direct unsupervised contact with young people (BB.2).

Participants should be suitably briefed with regards to keeping safe, and should be advised as to when and how to report an issue or raise the alarm (BB.3)

CC Environmental issues

The provider should be able to illustrate the known impact of their own and other groups in the same area, ie number of expeditions, expedition 'overload' (CC.1). The Young Explorers Trust '*Environmental Responsibility for Expeditions*' and '*Safe and Responsible Expeditions*' is recommended guidance (see www.theyet.org) (CC.2)

Request for outline LA approval for an overseas expedition organised through an independent provider

Name of school/centre

Name of EVC.....

Name of intended school leader

Approximate dates of intended expedition

Intended geographical area

Details of intended overseas expedition provider:

Name

Address

.....

Tel..... E.mail

☐

I attach a statement from the above named provider, which confirms complete compliance with the LA's guidance for overseas expeditions (Annex 10, Educational visits)

☐

The school/centre/provider is unable to comply with the following numbered statements in the LA's guidance for overseas expeditions (Annex 10, Educational visits) (e.g. C.1, F.2, etc)..... but nonetheless requests outline LA approval for this expedition (please attach further details).

Please return to the Outdoor Education Adviser, and await response prior to making a commitment with a provider.

FOR LA USE

☐

Outline LA approval is granted for this expedition. You may enter into a contract with the above named provider. The Outdoor Education Adviser will make contact with the school Leader and EVC during the preparatory stages. You should contact the Outdoor Education Adviser at any point during the planning stage if further advice is required.

☐

It is not possible to grant Outline LA approval for this venture at this stage. The Outdoor Education Adviser will contact you to discuss further.

Signed.....(Outdoor Education Adviser) Date.....

Final LA approval for overseas expedition organised through an independent provider: Request for meeting with Outdoor Education Adviser

Name of school/centre

Name of EVC.....

Name of school leader.....

Dates of expedition

Geographical area.....

Name of overseas expedition provider

Name of expedition leader

Date outline LA approval granted

The following documents will be available for discussion at the meeting, and copies will be available for LA records:

☐ Final itinerary

☐ Form EV1 (*Educational Visits*, Section Q, model form EV1) – only for schools/centres not able to access an electronic visit planning system

☐ Provider information including Risk Assessments

I confirm that:

☐ Insurance details have been approved by the LA Insurance Section

☐ All arrangements have been finalised in accordance with LA Guidance.

Signed.....(Head).....(date)

Signed.....(EVC).....(date)

Please return to the Outdoor Education Adviser at least 8 weeks prior to the expedition.

FOR LA USE

☐

Final LA approval is granted for this expedition and we wish you a successful venture You should contact the Outdoor Education Adviser if any significant changes are proposed to the expedition prior to departure

☐

It is not possible to grant final LA approval for this venture at this stage. The Outdoor Education Adviser will contact you to discuss details.

Signed.....(Outdoor Education Adviser) Date.....

ANNEX 11

Managing risk in outdoor learning within the Foundation Phase

This section offers guidance to practitioners on managing risk in outdoor learning within the Foundation Phase.

The Foundation Phase is the curriculum for 3 – 7 year olds in Wales, introduced in 2008. A key element of the Foundation Phase is the use of the outdoors for all seven areas of learning, including opportunities for children to take risks and become confident explorers of their outdoor environment. In order to provide rich experiences for the children in their care, Foundation Phase practitioners need to seek a healthy balance of risk management that allows the children opportunities to explore and experience risk without exposing them to significant danger. This balance of benefit and risk is central to the HSE's principles of sensible risk management.

Responsibility for risk management

Responsibility for management of health and safety lies with the employer. Foundation phase settings and the usual employers associated with these are set out in the table below:

Setting	Usual employer
Child minder	Child minder
Playgroup	Owner, trustees or management committee
Private nursery	Owner, trustees or management committee
Maintained nursery	Local Authority or Governing Body
School	Local Authority or Governing Body

Employees have delegated responsibility to follow their employer's health and safety policy, apply their common sense and do their best to identify and manage risk and report any areas of concern to their employer.

The practitioner in charge of the outdoor learning session should ensure that any adult volunteers are aware of and fulfilling their role within the risk management procedures.

Risk assessment

Ensuring that outdoor learning within the foundation phase is risk assessed appropriately is the legal responsibility of the employer. To ensure that risk assessments are understood and implemented, it is normal practice for the employer to delegate the task of risk assessment to the practitioners. But whoever completes the written risk assessment, it is the employer who is ultimately legally responsible for ensuring that it is suitable and sufficient.

The risk assessment should identify hazards that present **significant** risks to the children/adults and the measures that are needed to reduce these risks to a tolerable level. Significant risk can be defined as likely to lead to serious harm unless something is done to reduce the risk. This does not usually include normal life risks that are unlikely to result in serious harm e.g. bumps, scrapes, minor cuts and bruises.

Risk assessments should be reviewed and updated periodically or following any incident or change that presents additional significant risk. Risk assessments create a valuable source of accumulated knowledge for the induction and on-going training of practitioners.

It is good practice to draw up a standard risk assessment that covers the following aspects of Foundation Phase outdoor learning (an example of a standard risk assessment is given in table 1).

Areas to consider when completing a risk assessment

The outdoor learning setting

This can either be the setting's own grounds or an area beyond the immediate grounds e.g. local park, allotment or countryside. Hazards that present significant risk might include traffic, open water, unwanted visitors, dangerous debris e.g. glass, needles, dog faeces.

The activities

The standard risk assessment should cover the range of activities planned (both child-initiated and those directed by practitioners). If a new activity is being introduced, the practitioner should consider whether it is already covered in the standard risk assessment. If there are additional significant risks and safety measures then these should be added to the standard risk assessment and communicated to, understood and followed by all practitioners. It is useful to leave a blank row on the standard risk assessment for this purpose.

The weather

Appropriate clothing and footwear will allow learning outdoors to continue in all but the most extreme weather conditions. Learning outdoors in a wide variety of weather conditions brings the added benefit of teaching children about how to keep themselves comfortable and safe in a range of environmental conditions – rain, wind, sun, heat and cold.

The children and adults present

Differences between individuals can influence the level of risk presented by the same hazard e.g. a trip would not normally pose a significant risk but might do so for an individual with osteoporosis.

The practitioner(s) should therefore take into consideration the special educational, medical or behavioural needs of children and adults in the group and plan and manage their outdoor learning sessions to take account of these.

Dynamic risk management

Dynamic risk management involves the common sense judgements and decisions made by the practitioner as situations arise during a session for example a sudden change in weather or behaviour issues.

As children explore and experiment in the environment the practitioner should observe and intervene on grounds of safety only if there is significant risk of harm to the child.

Action taken as a result of dynamic risk management may require changes to the standard risk assessment.

Table 1 **Example of standard risk assessment for Foundation Phase outdoor learning**

Setting:

Risk assessment completed by:

Date risk assessment completed:

Significant hazards	Who might be harmed?	Safety measures: <i>Measures that are in place and/or will be taken to reduce the risk to a tolerable level</i>
Road traffic		<ul style="list-style-type: none"> Setting location chosen to minimise danger from road traffic Group briefed on road dangers and supervised to ensure safe practice
Changes to the site e.g. dangerous debris, loose branch		<ul style="list-style-type: none"> Visual check for changes by practitioner prior to/at start and during session. Dangerous changes isolated or removed/disposed of safely. If not possible, activity discontinued. Problem reported at base.
Special medical, educational or behavioural needs		<ul style="list-style-type: none"> Young peoples' special medical or behavioural needs known to staff and volunteers and appropriate support provided Activity modified to ensure appropriateness for children If children require medication this is carried by an adult who is able to administer
Handling soil, vegetation etc.		<ul style="list-style-type: none"> Children briefed on specific hazards of activity / venue and supervised to ensure they follow safety procedures Hands washed prior to eating
Child separated from group		<ul style="list-style-type: none"> Regular head-counts carried out Practitioners and other adults positioned to ensure effective supervision at all times
Site and activity-specific hazards		<ul style="list-style-type: none"> Site and activity chosen to not exceed tolerable risk Staff and other adults aware of safety measures and supervise children to ensure these are followed

Weather extremes – wind, cold, sun or heat related conditions & injuries		<ul style="list-style-type: none"> • Appropriate clothing and footwear for children and adults • Plan for pupils and adults who do not have appropriate clothing – check before leaving or have spares • Condition of individuals monitored • Weather conditions taken into account during venue/activity choice • Individuals encouraged to apply sun protection as necessary. Visit leaders may issue sun cream unless parent/carers consent has identified an allergy to sun cream for that child. • Avoid exposed woodland / trees during damaging winds
Accidents and emergencies		<ul style="list-style-type: none"> • Appropriate first aid cover (kit and first aider) provided for activity and venue • Method of summoning help available
Child protection issues		<ul style="list-style-type: none"> • Setting chosen and group supervised to minimise risk of stranger danger • Staff follow employer's child protection procedures