



# Educational Visits

## Policy

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## APPENDICIES

- Appendix one - Educational Visits Checklist
- Appendix two - Risk Assessment (Form 2)
- Appendix three - Parental Consent (Form 3)
- Appendix four - Annual consent form for low risk activity (Form 3a)
- Appendix five - Summary Contact checklist (Form 4)



## 1.0 EXECUTIVE SUMMARY

The purpose of this document is to offer support to all schools and academies, targeted Youth Service and voluntary groups that take part in off-site, educational, residential, and adventurous activity. It supports the use of these exciting, highly motivating environments and activities that help our children and young people to learn.

This policy sets out clear procedures to ensure that educational visits are safe and well managed. Individual roles and responsibilities are defined. Risk assessment is an important part of the process and a pro-forma is included.

Local Authority (LA) approval is required for all residential visits and hazardous/ adventurous activities and should be submitted through EVOLVE at least 28 days in advance. LA approval is granted through School Improvement Liverpool Ltd on behalf of the LCC. At some point during this academic year this will change and LA maintained schools will be approved by LCC, academies and voluntary aided schools will be approved by SIL.

Settings will be notified in advance of this happening and advised of who will undertake their approvals.

Educational Visit Co-ordinators (EVCs) should ensure group leaders follow the policy.

SIL will help EVCs by providing training, monitoring visits and processing applications for approval.



## 2.0 EDUCATIONAL VISITS HEALTH AND SAFETY POLICY

This policy reflects good practice in all types of educational visit – no matter who is doing the providing and who is doing the learning. It is addressed to schools, but the term 'School' also applies to Youth Centres, Leisure Centres and other facilities that are involved with providing educational visits. The role of 'Head Teacher' applies to Targeted Youth Service Area Coordinators, and the role Educational Visits Co-ordinator may be fulfilled by Targeted Youth Service team leaders, Leisure Centre Managers and managers of other facilities that are involved with providing educational visits. Anyone involved with groups of young people on educational visits is subject to this guidance. Where this policy refers to 'teachers' it includes 'lecturers', 'Youth Workers' or 'Mentors', and 'parent' means all those having parental responsibility for a child/young person.

Children/young people can derive a good deal of educational benefit from taking part in visits with their school. They have the opportunity to develop skills and undergo experiences not available in the classroom. The purpose of this policy and guidance document is not to restrict or constrain these activities but to support them by providing a planning framework that clarifies and endorses the concerns for the health, safety and welfare of children/young people, staff and others, held by Liverpool City Council. Health and safety considerations supersede educational aims at all times.

The duty owed by the Council to ensure the health, safety and welfare of employees and others who may be affected by the Council's work is extended to any group member involved in educational visits where there is some responsibility for care.

Liverpool City Council's Educational Visits Health and Safety Policy comes under the umbrella of Liverpool City Council's Corporate Health and Safety Policy. It should be considered alongside existing emergency procedures such as the Liverpool City Council's Emergency planning unit and Local Authority's (LA) document "School Emergency Management Plan" (SEMP)

The Local Authority (LA) advice contained in this document and the need for LA approval for category (iii), (iv) and (v) visits (see section 3.1 types of visit) applies to all educational visits. Parental approval must be obtained for all categories of visit. Governing bodies should be informed of all categories of visit, their approval being required for category (iii), (iv) and (v) visits. Informal arrangements for the organisation of visits that take place within a school closure period or where the visiting party is comprised of children/young people and supervising adults from more than one school must still comply with the policy detailed in this document.

Particular care should be taken, with specific reference to insurance requirements (see section 7.0 Insurance), if a visit is organised by a non-employee but under the title of 'Educational Visit', for example parents organising a visit to a concert or volunteers organising youth activities. The school will require separate, additional insurance cover for any such activities undertaken independently without the invitation of the LA which should meet as a minimum requirement the guidance within this document.

The School's Policy on educational visits should be issued to all staff involved with educational visits, as it is good practice for all staff to be aware of available guidance and advice. Each member of staff invited to go on an educational visit must sign and return an acceptance of that invitation, which should include a declaration that they have read and understood the LA's Educational Visit Policy Document and any other relevant available advice and guidance. Finally all those involved with organising and undertaking educational visits must realise their legal obligations as regards health and safety, being 'in loco parentis' (where applicable) and in the importance of undertaking regular 'headcounts'.



In 2001 Disability Discrimination Act was amended by the Special Education Needs and Disability Act 2001. This amendment makes it unlawful for schools, colleges and other education providers to discriminate against disabled people. The law covers all areas of education; which includes universities, adult education and youth services. None of these bodies may treat disabled children or young people less favourably or put them at a "substantial disadvantage". They have to make reasonable adjustments (changes) to solve problems. All must take reasonable steps to amend any policies, procedures or practices that discriminate.

The law also covers the way schools admit children/young people, the way they are taught and the way they are provided services such as educational visits or 'after school clubs'. Any special aids, which an individual may require whilst at school, should be provided via the Special Education Needs System, not by an individual school.

This Policy is a 'living document', and as such will be regularly reviewed and updated by the local authority in light of any pertinent developments in statutory duties, national or local codes of good practice and experience.

- GROUP LEADERS**
1. Appoint a deputy
  2. Define each Group Supervisor's role
  3. Undertake planning of visit with Co-ordinator including risk assessments, emergency procedures, required training etc.
  4. Ensure ratio of supervisors to children/young people is suitable
  5. Be aware of safeguarding arrangements
  6. Ensure DDA compliance
  7. Ensure supervisors are aware of pupil's special needs
  8. Attend briefings for parents, Governing Body etc.
  9. Evaluate and review visit

- TEACHERS**
1. Do best to ensure health & Safety of self & others.
  2. Consider stopping activity, notify Group Leader if risks to children/young people or themselves is unacceptable
  3. Follow instructions of Group Leader

- EMERGENCY PROCEDURES**
1. School Emergency Management Plan (SEMP)
  2. telephone numbers known
  3. School/base Emergency Contact Telephone number known
  4. Parent/guardian contact known
  5. Visit emergency plan prepared as part of risk assessment
  6. Suitable first aid provisions in place
  7. Suitable number of trained first aiders
  8. Suitable trained staff (lifeguards) for dealing with particular emergencies
  9. Suitable emergency equipment for activities where required
  10. Contingency plans in place
  11. Accident/incident reporting

- CHILDREN OR YOUNG PEOPLE**
1. Not to take unnecessary risks
  2. Dress/behave sensibly.
  3. Look out for anything that might threaten themselves or others: inform supervisor of any hazards or dangerous situations
  4. Follow the instructions of Group Leader
  5. Adhere to the agreed Code of Conduct

- PARENTS or CARERS**
1. Make informed decision to allow child on visit
  2. Prepare child/young person for the visit
  3. Agree visit & emergency details
  4. Agree/supply any required information or payment
  5. Attend a pre-visit meeting
  6. Agree to the Code of Conduct for the visit

- EDUCATIONAL VISITS CO-ORDINATOR**
1. Support Head Teacher (Area Manager)
  2. Agree the following with the Head Teacher:
    - visit aims, objectives & value
    - risk assessment
    - general visit arrangements
    - emergency arrangements
    - exploratory visit
    - contingency plans
    - training needs
  3. Ensure adults on visit are:
    - Qualified, experienced, competent.
    - Consider concerns of parents & staff
  4. Vet & monitor contractors e.g. Tour operator or activity provider
  5. Evaluate visit
  6. Liaise with LA
  7. Maintain overall co-ordination of visit
  8. Identify Group/Activity Leaders
- Ensure DDA compliance

- HEAD TEACHER**
1. Liaise with Governing Body (schools)
  2. Provide sufficient resources for visit, its planning and funding
  3. Agree the following with the EVC:
    - visit aims, objectives & value
    - risk assessment
    - general visit arrangements
    - emergency arrangements
    - additional insurance cover
    - exploratory visit
    - contingency plans
  4. Ensure adults on visit are:
    - Qualified, experienced & competent
    - Consider concerns of parents & staff
  5. Liaise with LA if necessary
  6. Evaluate visit
  7. Ensure training needs are met
  8. Ensure DDA compliance

- VOLUNTEER HELPERS**
1. Do best to ensure Health & Safety of self & others
  2. Consider stopping activity, notify Group Leader if risks to children/young people or themselves is unacceptable
  3. Follow instructions of Group Leader
  4. Not to be left in sole charge of children/young people

- GOVERNING BODY**
1. Support Head Teacher
  2. Assess suitability of:
    - visit aims, objectives, value
    - risk assessment
    - general visit arrangements
    - additional insurance cover
    - emergency arrangements
  3. Ensure adults on visit are:
    - Qualified, experienced, competent
  4. Consider concerns of parents & staff
  5. Evaluate post visit reports
  6. Ensure DDA compliance

**SAFE EDUCATIONAL VISITS**



### 3.0 PLANNING AN EDUCATIONAL VISIT;

#### 3.1 TYPES OF VISIT

Visits can be categorised into three categories, these are:

##### Category A

These are activities that present no significant risks. They should be supervised by a teacher who has been assessed as competent by the LA or Educational Visit Co-ordinator, where appropriate, to lead the activity. Examples include walking in parks or field studies in environments presenting no technical hazards.

This category would also include Local Area Visits, which can be defined as low risks visits to venues in your local learning area.

The establishment is responsible for identifying their own Local Area Visits and naming the places covered by Local Area Visits

##### Category B

These comprise some higher-risk or higher-profile activities. LA approval is required for this category of activity. Safe supervision requires that the Group Leader should as a minimum, have undergone familiarisation specific to the activity and / or the location. The Group Leader will have to be approved as suitably competent by the LA, and hold any necessary qualification/award. Examples include; walking in non-remote country, camping or cycling on roads.

##### Category C

This is the most demanding category. It includes all those activities that if not school-led, would be in the scope of the Adventure Activities Licensing Regulations 1996. LA approval is required for visits in this category. In the case of sports, where safe supervision requires the leader to complete some prior test of his/her specific competence, such testing might include a recognised course of training, the recorded accumulation of relevant experience or an assessment of competence by an appropriate body.

The range of visits offered to children and young people is further categorised by whether the visit is to be residential or abroad: -

- i) Visit as part of a regular curricular activity within School / Youth Club hours with non-hazardous activities - Category A; e.g. a visit to the local park or library.
- ii) Visits not usually part of the school day / Youth Club hours that may extend beyond the end of the school day / Youth Club hours with non-hazardous activities – Category A; e.g. a visit to Chester as part of a 'Romans' topic.
- iii) Visits including an overnight stay – Category A/B; e.g. a visit to a European Country as part of language studies.
- iv) Visits of one day or less involving hazardous activities – Category B/C; e.g. visit to do rock climbing or abseiling.
- v) Visits including an overnight stay and involving hazardous activities – Category B/C; e.g. staying in an outdoor activity centre and taking part in canoeing or other hazardous activities.

LA approval is not required for visits in categories (i) and (ii), however schools should employ this policy document as a basis to develop their own guidelines of good practice for such visits.

LA approval is required for all visits in categories (iii), (iv), and (v).

The LA will undertake sample monitoring of all educational visits.



### Hazardous Activities

The activities listed below require LA approval. Please complete an EVOLVE submission and submit it at least 28 days in advance.

You must indicate the appropriate type of activity (The submission may cover more than one field):

Is this an Overseas visit?

Is this a Residential visit/activity?

Will this event include an Adventurous Activity led by an External Provider (not school staff)?

Will this event include an Adventurous Activity led by a member of school staff

#### Hazardous activities include:

Multi Activities - led by External Provider such as Kingswood or PGL

Abseiling

Air activities (excluding commercial flights)

All activities in 'open' country (see guidance)

All other forms of boating (excluding commercial transport)

Archery

Bouncy Castles - Must be run and managed by the independent company not the school

Camping

Canal boating

Canoeing

Caving / potholing

Climbing

Coasteering/coastal scrambling/sea level traversing

Expeditions- including DofE and pre-expedition training

Farm Visits – both onsite and off site visits

Forest School – sessions involving knives and or campfires





Fishing

High level ropes courses

Hill walking and Mountaineering -

Horse riding

Ice Skating

Kite flying/surfing

Low and high ropes courses

Moorland, fell and mountain activities

Motor sport – all forms

Mountain Biking

Off road cycling

Open country activities and field studies

Orienteering

Paintballing

Rafting or improvised rafting

River/gorge walking or scrambling

Rock climbing (including indoor climbing walls)

Rowing and Sculling

Sailing / windsurfing / kite surfing

Sea-level traversing and coastering

Shooting and archery

Skiing

Skiing - Indoor or Dry Slope

Snorkel and aqualung activities

Snowboarding

Surfing



Swimming (all forms, excluding national curriculum lessons)

Theme Park Visits

Trampoline Parks- visits to trampoline parks is not allowed and will not be approved

Underground exploration

Use of powered safety/rescue craft

Walking near Water (such as beach or canal)

Water skiing

'Extreme' sports

This list is not exhaustive, if in doubt seek advice for your educational visits contact, either SIL or LCC.

### 3.2 NOTIFYING THE LA

Local authority powers

Where the local authority is the employer (community, voluntary controlled, community special schools and maintained nursery schools), it may give a direction concerning the health and safety of persons (including pupils) on the school's premises or taking part in any school activities elsewhere. Under section 29(5) of the Education Act 2002, governing bodies of such schools must comply with any such direction from the local authority.

The requirement for the approval of visits extends to all residential activities and any visit abroad, whether they include a hazardous activity or not. Contact your educational visits contact at SIL or LCC for advice if you are not sure whether you require approval for a particular visit.

Please note, where LA approval is applicable, outline approval from the LA should be obtained for an educational visit at the earliest opportunity, and in any case, before any visit arrangements are finalised and prior to offering the visit to the intended group of children/young people.

The LA should be notified via EVOLVE which should be sent at least 28 days in advance of any visit.

### 3.3 EXPLORATORY VISITS

An exploratory visit should be made, where possible, by any person who is to lead a group abroad, on a residential visit or who is to instruct or lead the group in an outdoor activity such as trekking in a location that is not familiar to them. In other cases an exploratory visit should be undertaken to ensure that the venue is suitable, safe and meets the aims and objectives of the visit and can meet any other required needs.

Particular attention should be given to the potential for adverse weather conditions and the dangers presented by them, for example; flash floods, snow, frost, mud slides etc.

The exploratory visit should be used to assist in undertaking an assessment of the areas and levels of risk. Where an exploratory visit is not feasible the Group Leader should, as a minimum requirement, obtain specific information in writing from the proposed venue, other schools that have used the venue, local organisations, or Tourist Boards that will enable a suitable assessment of risk to be undertaken.



### 3.4 STAGES FOR PLANNING A VISIT

The stages outlined below can be used as a tick list for use when organising a visit. There is a more comprehensive Educational Visit Checklist within the appendix.

Outline proposal to Head Teacher, Governing Body or Targeted Youth Service Area coordinator to seek approval in principle – Planning of a visit should be discussed with the Educational Visits Coordinator

- Visit's aims & objectives
- Likely date, duration, venue
- Participant & staffing arrangements
- Resources and estimated costs
- Outline approval of LA for high-risk visits. If unsure of the category of your visit contact the Outdoor Education Officer at the LA for advice

PLANNING

- Contact the venue; ensure it is suitable for the visit (see section 11)
- Decide on transport details (see sections 8, 11 & 12)
- Decide on Group Leader/Supervisors & adult volunteers (see section 4)
- Decide on funding and budget arrangements (see section 13)
- Undertake a risk assessment one generic risk assessment may cover several similar visits (see Section 6)
- Undertake an exploratory visit if required (see Section 3.3)

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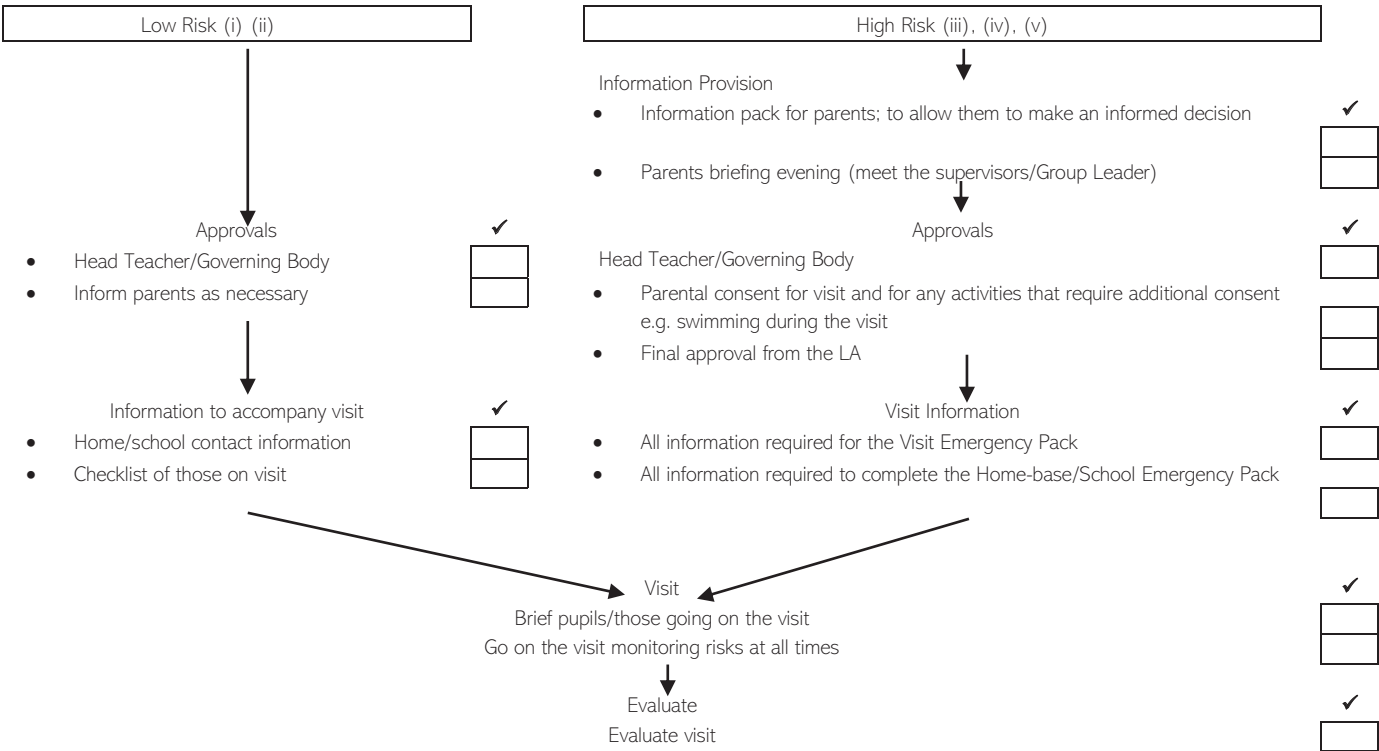
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Substantive detailed proposal to Head Teacher, Governing Body & EVC  
Provide full details of:

- Risk assessment and intended hazard control measures (see section 6)
- Emergency procedure and Home/School Contact (see section 14)
- Transport arrangements (see sections 8, 11 & 12)
- Insurance arrangements (see section 7)
- Costs (see section 13)
- Group membership (see section 4)
- Staffing details; relevant qualifications & experience (see sections 4 & 5).
- Contingency plans e.g. bad weather activities planned.

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## 4.0 ROLES & RESPONSIBILITIES

### 4.1 RESPONSIBILITIES OF THE LOCAL AUTHORITY

Schools should contact your educational visits contact in the first instance if advice is required on any aspect of educational visits. Should further advice be required you may be referred to the Liverpool City Council's Health and Safety Unit. SIL with the assistance of the Health and Safety Unit shall: -

- Monitor educational visits (their aims and objectives) carried out by schools and other relevant facilities including all visits that involve an overnight stay, trip abroad and/or hazardous activity.
- Monitor processes and procedures prior to educational visits; carry out 'spot checks' during visits with appropriate intervention when necessary. The outcome of such monitoring may be reported back to the relevant Governing Body or where necessary to all facilities involved with educational visits.
- Ensure all those involved with organising and undertaking an educational visit are aware of the importance and timing of undertaking head counts.
- Spot check the competencies and qualifications of any adult who wishes to take charge of a hazardous activity.
- Be responsible for keeping relevant documentation and guidance up to date taking into account changes in the law and best practice.
- Ensure that suitable and sufficient risk assessments are completed, with particular attention to detail before any overnight stay, trip abroad or hazardous activity takes place.
- Periodically check the suitability of contractors used by schools for teaching hazardous activities. This will involve checks of risk assessments as well as qualifications of staff that teach the activities.
- A bulletin will be issued to all schools highlighting all new guidance and relevant information relating to health and safety and educational visits. This will pinpoint any action schools need to take.
- Provide an emergency contact number for schools, academies, and Targeted Youth Service groups to use in the event of an incident.
- Appoint an officer, who will have suitable experience, competencies and qualifications to undertake the role.
- This post is located within SIL or LCC will provide liaison with the council press office and emergency planning unit in the event of an incident

#### Training of staff and others

- Provide training, guidance and advice to the Educational Visits Coordinators and monitor their work.
- Provide written guidelines for governors and head teachers including advice on risk assessment.
- Assist in arranging the provision of relevant training for any member of staff that requires it; in order to improve competence in organising and undertaking educational visits.



## 4.2 RESPONSIBILITIES OF THE GOVERNING BODY

Where the Governing Body is the employer such as Voluntary Aided schools and academies; the governors' responsibilities are the same as those of the LA. In such cases the Governing Body may wish to adopt the LA Educational Visits Policy. In any case the Governing Body should have an agreed policy on educational visits, which requires it to approve all visits. The Policy should contain details on the methodology of Policy implementation and review.

The governing bodies of all types of school should: -

Ensure that the Head Teacher and the Educational Visits Co-ordinator are supported in matters relating to educational visits including the provision of suitable resources and expertise to enable them to effectively fulfil their responsibilities. The Governing Body should ensure that there is a mechanism to formally convey all information relevant to managing health & safety to a newly appointed head teacher, whether an external or internal appointee.

- Evaluate relevant available governor training.
- Ensure that educational visits offer value, have specific and stated aims and objectives, and are appropriate to the age and abilities of the group.
- Assess the suitability of all travel, accommodation and communication arrangements. Paying particular attention to visits involving an overnight stay, travel outside of the U.K. or those involving hazardous activities; submitting said proposals to the LA where appropriate.
- Ensure that the Head Teacher / Group Leader inform the Governing Body regarding less routine visits well in advance.
- Help to ensure the adequacy of educational visit planning and preparation including the involvement of children/young people in the planning stage and ensure that early planning and pre-visits take place where required, and the results are acted upon.
- Ensure that the Head Teacher / Group Leader demonstrate how their plans comply with relevant regulations and guidelines, including the school's Health & Safety Policy and that the Head Teacher/Group Leader reports back to the Governing Body after the educational visit.
- Ensure that a suitable and sufficient Educational Visit Risk Assessment has been carried out, ensuring hazards have been identified, assessed and managed, relevant training has been addressed and appropriate safety measures are in place including overnight security.
- Ensure the adequacy of staff qualifications/competence to undertake suitable risk assessments and participate in visit activities. All training must be recorded and should be able to be tracked, including the number of staff and helpers and their qualifications, competencies and experience.
- Ensure that bookings are not completed until external providers have provided all the necessary assurances.
- Ensure that the Head Teacher and the Educational Visits Co-ordinator have taken all reasonably practicable measures to include children/young people with special educational, physical or medical needs on an educational visit.
- Consider concerns raised by children/young people and parents as well as any staff concerns and suggestions for improvement.

The outcome of reviews should be documented, kept and made available for inspection by the LA or the Health and Safety Unit.



### 4.3 RESPONSIBILITIES OF THE HEAD TEACHER OR TARGETED YOUTH SERVICE AREA COORDINATOR

- Head Teachers should ensure that Educational Visits comply with relevant regulations provided by the LA, the Governing Body and the school's own Health and Safety Policy. Head Teachers should ensure that the Group Leader is competent to monitor risks.
- Head Teachers should ensure that there is somebody to fulfil the role of Educational Visits Co-ordinator who will be responsible for all off-site educational visits. That person should be fully aware of current LA policy and other advice.
- Head Teachers should be clear about their role if taking part in an educational visit. They may wish to act as a group member, supervisor, or the group leader. However if the Head Teacher or Targeted Youth Service Area Coordinator is not the designated group leader they should follow the instructions of the group leader who will have sole charge of the visit.
- Targeted Youth Service Area Coordinators have a similar role to the Head Teacher and Targeted Youth Service Team Leaders play a similar role to the Educational Visits Co-ordinator for their particular service.

Head Teachers and Targeted Youth Service Area Coordinators should ensure that: -

Organisational arrangements of the visit

- The Educational Visits Co-ordinator fulfils his/her duties in relation to the visit.
- Group Leaders are allowed sufficient time to organise educational visits properly.
- Non-teacher Supervisors on the visit are competent to supervise children. Adult volunteers other than staff who are employed by the school, who are acting as supervisors, on residential activities they should have an enhanced Disclosure and Barring Service DBS check and barred list check. It is desirable that any adult volunteers who regularly help the school by acting as supervisors on day visits have an enhanced DBS check. Adult volunteers who are providing help on a "once off basis" need not have a DBS check but should work under direct supervision.
- Volunteers attending visits should have a positive impact on the visit and be assigned a role as part of the visit.
- It is essential that volunteers attending visits are aware of the role that they will play, and the requirements of the roles that they are assigned as they have an active role to play in the visit.
- The engagement of any volunteer must involve an appropriate level of vetting and induction.
- They must be sufficiently competent and confident to carry out their responsibilities.
- The ratio of supervisors to children/young people is appropriate (see Section 5.0, Supervision and Staffing Ratios).
- All those involved with organising and undertaking an educational visit are aware of the importance and timing of undertaking headcounts.
- The visit aims and objectives are included and stated in pre-visit documentation.



- The group leader, supervisors, nominated school / home-base contacts, and where appropriate the LA, have the names of all adults and children/young people travelling in the group and the contact details of parents, teachers, other supervisors and next of kin (see Section 14, Emergency Procedures).
- Significant issues identified during exploratory visits have been satisfactorily resolved with hazards and related controls being noted within an appropriate risk assessment.
- The educational visit venue address, telephone number and a contact name are known by all parties and any required accreditation and verification of activity providers have been checked.
- The mode of travel is appropriate and comprehensive vehicle insurance is in place.
- The travel times out and back and drop-off/pick-up points are agreed and known by all parties.
- There is adequate and relevant insurance cover for the entire educational visit (see Section 7, Insurance).

#### Approval of the visit

- Arrangements are in place to make the Governing Body aware of all educational visits and that they have the opportunity to ask questions about particular visits.
- The LA and / or the Governing Body have approved the visit where appropriate
- Parents have signed consent forms
- The head teacher should only approve the visit when they are satisfied that all necessary arrangements are in place for it to be undertaken without unacceptable risks to safety and health.

#### Funding

- Appropriate consideration is given to financial management and obtaining best value.
- Banking arrangements are in place to separate the educational visit's receipts from other school funds and private accounts.
- There is a prior agreement in place with parents as to whether any surplus funds following the educational visit are returned to them or put to other specified uses.
- Arrangements made to fund visits should be compliant with the school's charging policy

#### Training of staff and others

- Sufficient time and other necessary resources are made available for the Educational Visits Co-ordinator to arrange / provide, where required, an induction and other relevant training for staff and volunteers prior to an educational visit.
- The Group Leader or others are suitably competent (qualified and experienced) in any activities that they are required to provide instruction and is familiar with the location or centre where the activity will take place. Further training should be provided where a need is identified.

#### Emergency procedures



- Relevant teachers are made aware of, and understand, the LA guidance on emergency planning (e.g. School Emergency Management Plan SEMP) in relation to the visit. Training must be provided for relevant staff.
- The school has robust emergency procedures in place in case of a major incident on an educational visit.
- The Educational Visits Co-ordinator briefs and provides written information to the Group Leader and supervisors about the emergency procedures as part of the educational visit briefing (see Section 14, Emergency Procedures).
- All those involved with organising and undertaking an educational visit are aware of the importance and timing of headcounts.
- Serious incidents, accidents and near misses are investigated, reported and recorded as required by both RIDDOR and the City Council's Health and Safety Unit (see Section 15, Accident Reporting Procedures). Records should be regularly reviewed, information from which, should be used in improving arrangements in future visits.
- There are two nominated Emergency School / Home-base Contacts, who have the authority to make significant decisions. They should be adequately briefed / trained as to their role, be competent and contactable at all times during the visit, hold the emergency information and be able to respond quickly to the demands of an emergency.
- Child protection procedures are in place.
- A procedure is in place to ensure parents are informed quickly regarding any accident or incident by a School/home-base contact.
- The Educational Visits Co-ordinator impresses upon parents the necessity of providing more than one emergency contact telephone number.
- Contractors (tour operators or activity/transport providers) have adequate emergency support measures, and these measures link into the school's and the LA's own emergency procedures.

#### Medical requirements

- Adequate first aid provision is made including trained first aiders.
- Arrangements have been made for the particular medical and special educational needs of all group members.
- Additional individual risk assessments, where applicable, for participants with medical and special educational needs requirements.

#### Contingency plans

- There is an adequate contingency plan for any delays or visit programme timetable alterations including an early or late return home.
- There is an adequate contingency plan covering situations such as staff illness and the need to change routes or activities during the educational visit. This plan should form part of the parental consent notification.

#### Evaluation of visit

- Educational visits are evaluated to improve the operation of future visits and to identify any training needs.





#### 4.4 RESPONSIBILITIES OF THE SCHOOL'S EDUCATIONAL VISITS CO-ORDINATOR OR TARGETED YOUTH SERVICE TEAM LEADER

The Educational Visits Co-ordinator should be directly responsible to the Head Teacher as much of the responsibility of that position relates to assisting the Head Teacher in the effective implementation of the school's health and safety policies. The Co-ordinator should be involved in the planning and management of all educational visits led by school staff and others and receive specific training from School Improvement Liverpool. The role of the Educational Visits Co-ordinator must be clarified by the Head Teacher so as to minimise any confusion caused by overlap between the two roles.

Targeted Youth Service Team Leaders play a similar role to the Educational Visits Co-ordinator and Targeted Youth Service Area Coordinators have a similar role to the Head Teacher for the services for which they are responsible.

The Educational Visits Co-ordinator/ Targeted Youth Service Team Leader should: -  
Make organisational arrangements of the visit

- Comply with the SIL Educational Visit Policy.
- Liaise with SIL & LCC where applicable to ensure that educational visits are organised in accordance with SIL Educational Visits Policy including undertaking risk assessments.
- Ensure planning includes meetings with relevant Activity Centre staff.
- Ensure overall co-ordination is maintained when a visit involves the party being accommodated at, and or operating from more than one centre and to ensure the Group Leader has contact with individual Activity Centre Supervisors.
- Assign competent people to lead or supervise the visit.
- Ensure Disclosure and Barring Service checks are in place, where required, for any adult other than an employee of the school or youth group.
- Identify co-ordinators and leaders of specific activities that may be required during the visit prior to the educational visit taking place and ensure their level of competence, relevant experience and qualifications are suitable.
- Ensure all activity leaders are aware of any advice and associated guidance for the activities they are leading, in particular the risk assessment process.
- Ensure all those involved with organising and undertaking an educational visit are made aware of the importance and timing of undertaking headcounts.

Approval of the visit

- Support the Head Teacher and Governors with approval and other decisions.
- Work with the Group Leader to provide full details of the educational visit beforehand so parents can give or refuse consent on a fully informed basis. Obtain written confirmation of parental consent or refusal.
- Ensure that the LA is provided, where applicable, with a completed approval request form at the earliest opportunity, and in any case, before any educational visit arrangements are finalised and prior to offering the educational visit to children / parents. Provide details of any amendments to the original submission at least 28 days prior to the educational visit taking place.

Training of staff and others



- Assess the competence of those who have specific responsibilities such as the Emergency School / Home-base Contacts as well as those going on the educational visit such as group leaders, and other adults. This may be done with reference to accreditations from awarding bodies, practical observation of skills and verification of relevant experience.
- Assist in organising the general training of group leaders and other adults going on a visit including hazard awareness training, first aid and other emergency procedures.
- Assist in organising a thorough location-specific induction of the Group Leader and other relevant adults taking children/young people on an educational visit.

#### Emergency procedures

- Check that emergency arrangements including a suitable 'emergency plan' are in place and there are two nominated Emergency School / Home-base Contacts. The plan should be agreed with Targeted Youth Service Youth Coordinator/Head Teacher and known by those leading the educational visit.
- Keep records of individual educational visits including any near misses, accidents and incidents.
- Prepare a contact checklist of all going on an educational visit and ensure the Group Leader and the nominated Emergency School / Home-base Contacts have a copy of it.

#### Evaluation of Education Visits

- Monitor and review systems for managing educational visits taking into account any health and safety shortfalls, accidents or near misses during the visit. Assist the Head Teacher in identifying any training or organisational needs.

#### 4.5 RESPONSIBILITIES OF THE GROUP LEADER

The Group Leader has overall responsibility for the supervision and conduct of those on the visit, and must have regard to the health and safety of the group. The Group Leader must have been either appointed or approved by the Head Teacher, the Governing Body or Targeted Youth Service Area Youth Coordinator.

The Group Leader should:-

#### Organisational arrangements of the visit

- Comply with the LA's Educational Visit Health and Safety Policy.
- Appoint a deputy. Brief the Emergency School/Home-base Contacts; ensure they are clear in their role.
- Clearly define each Group Supervisor's role and ensure all roles have been assigned.
- Be able to control and lead children/young people of an age and ability appropriate to the visit.
- Be familiar with the location or centre where the activity is to take place and if expected to instruct be suitably competent (experienced / qualified) to do so.
- Be aware of issues relating to safeguarding and also inclusion.
- Undertake with the assistance of the Educational Visits Co-ordinator/ Targeted Youth Service Team Leader the complete planning and preparation of the educational visit including arranging suitable visit insurance cover.



- Undertake and complete, with the assistance of the Educational Visits Co-ordinator/ Targeted Youth Service Team Leader, an appropriate risk assessment of the educational visit and related activities (see Section 6, Risk Assessment).
- Have sufficient information on the children/young people who are to participate in a proposed educational visit to assess the suitability of the visit and to make an informed decision about whether an individual child/young person should participate.
- Ensure that the ratio of supervisors to children/young people is appropriate to meet the needs of the group and any intended visit activities (see Section 5, Supervision and Staffing Ratios).
- Ensure that the group's teachers and other supervisors have the relevant details of any special educational or medical needs of pupils which will be necessary for them to fulfil their roles.
- Ensure parents/guardians are aware of how to prepare their children for the educational visit.

#### Approval of the visit

- Obtain the Head Teacher's (Targeted Youth Service Area Youth Coordinator) agreement prior to any educational visit taking place.

#### Training and preparation of staff and others

- Undertake briefings of parents, pupils and other relevant people prior to educational visit.
- Ensure that teachers and other supervisors are fully aware of what the proposed educational visit involves during its planning stage and those expected to lead activities have the necessary competence, qualifications and experience to do so.

#### Emergency Procedures

- Ensure that adequate first aid provision is available including a suitably trained first aider.
- Consider terminating the visit if the risk to the health and safety of the children/young people or other group members become unacceptable and have in place procedures for such an eventuality.
- Ensure that Group Supervisors have details of and the ability to contact a School/Home-base Contacts.
- Ensure that the Emergency School / Home-base Contacts have a copy of the visit's emergency procedures and other relevant information and that he/she understands it.
- Have to hand during the visit a contact checklist of all going on an educational visit and have the details of, and the ability to contact, two nominated Emergency School / Home-base Contacts.
- Report any significant accidents or incidents to a nominated School / Home-base Contact.

#### Evaluation

- Review the educational visit and activities and provide advice to the Head Teacher and Educational Visits Co-ordinator where adjustments may be necessary (see the Visit Evaluation Form No. 5, appendix 8).



## 4.6 RESPONSIBILITIES OF TEACHERS, ADULTS & CHILDREN / YOUNG PEOPLE

### Responsibilities of Teachers and Youth Workers

Teachers and youth workers on educational visits act as employees of the LA or of the governing body, whether the visit takes place within normal hours or outside those hours, by agreement with the Head Teacher (Targeted Youth Service Area Youth coordinator) and governors. They must do their best to ensure the health and safety of everyone in the group and act, as any reasonable parent would do in the same circumstances. They should: -

- Follow the instructions of the Group Leader and help with group control and discipline.
- Report any accidents or incidents to the Group Leader.
- Consider terminating the visit or the activity, notifying the Group Leader, if they think there is an unacceptable risk to the health and safety of the children/young people in their charge or any other group member.

### Responsibilities of Adult Volunteers and Support Workers

Non-teacher adults on the visit should be clear about their roles and responsibilities during the visit. They must be aware of the aims and objectives of the visit and of any special needs of group members. Adult volunteers and support workers must: -

- Do their best to ensure the health and safety of everyone in the group; and act as any responsible parent would do in similar circumstances.
- Not be left in sole charge of children/young people except where it has been previously agreed as part of the educational visit's risk assessment. Persons who have not had a Disclosure and Barring Service DBS check should never be left in sole charge of children/young people.
- Follow the instructions of the Group Leader and teacher-supervisors and assist with group control and discipline.
- Inform the Group Leader or teacher-supervisors if concerned about the health and safety of group members at any time during the visit. Report any accidents or incidents to the Group Leader.

### Responsibilities of Children and Young People

The Group Leader should make it clear to children/young people that they must: -

- Not take unnecessary risks and pay attention to and follow all safety instructions.
- Follow the instructions of the Group Leader and other supervisors including those at the educational visit venue.
- Arrive on time at the agreed location, dress and behave sensibly and responsibly.
- Bring any personal equipment or clothing required, look after it and any borrowed equipment.



- Be aware of, and where appropriate follow the country code and the school's / Targeted Youth Service code of conduct, e.g. take litter home.
- When abroad be sensitive to local codes and customs.
- Treat each other with respect and look out for anything that might hurt or threaten themselves or anyone in the group and tell the Group Leader or supervisor about it.

Young people of Youth Service age are usually capable of accepting some personal responsibility and should be encouraged to do so during any educational visit.

Children/young people should be excluded from going on an educational visit where their behaviour is considered to be an unacceptable potential danger to themselves or to the group and following a suitable risk assessment, and considering DDA requirements it is deemed that sufficient controls cannot be reasonably put in place. The educational aims of the visit for these children/young people should be fulfilled in other ways wherever possible.

#### 4.7 RESPONSIBILITIES OF AND COMMUNICATION WITH PARENTS

##### Information to Parents

Parents and guardians should be able to make an informed decision on whether their child should go on a particular educational visit. The Head Teacher / Targeted Youth Service Area Youth Coordinator or Group Leader should ensure that parents are given sufficient information in writing and are invited to any relevant briefing sessions or presentations to assist them in making the decision. Separate consent should be sought for residential and hazardous activities, however for routine educational visits that form a regular part of the school curriculum parents may be informed once via a letter and parental consent may be sought annually.

The following information should be provided to parents: -

- Date and duration of the educational visit.
- Educational visit or activity objectives.
- Detail of the cost of the visit or activity in consideration of the school's charging policy.
- Details of any existing or additional visit insurance cover.
- Times of departure and return and the location where the participants will be collected from and returned to – parents must agree to meet their child on return including arrangements for an early return (written agreement where necessary regarding meeting any additional costs for an early return).
- Details of travel arrangements including modes of transport and the names of any travel companies used.
- The size and gender mix of the group, details of local or remote supervision including the names and relevant competencies/qualifications of the Group Leader and other accompanying staff and adults.
- Details of accommodation including its name address and telephone number(s) of the final destination as well as those of any other overnight or en-route stops. Other details provided should include on-site security arrangements.



- Details for the provision of special educational, dietary, or medical needs.
- Details of any activities planned (specifying any hazardous activities) and how they will be supervised and assessed risks managed.
- Procedures for dealing with participants who may become ill or injured and other relevant emergency contact procedures. An emergency contact number should be given to parents
- Expected codes of conduct.
- Equipment, clothing and pocket money required on the visit as well as details of what should not be taken or brought back from the educational visit.
- Details of any inoculations or other medication (e.g. salt tablets etc.) that may be necessary.
- For exchange visits; details of host families.

In the case of day-visits involving lower-risk activities information may not need to be as detailed but should be provided to parents in writing. However before proceeding with residential visits, visits abroad, when engaging in potentially hazardous adventure activities or where the group will be remotely supervised parents must be both informed in writing as well as being encouraged to attend a briefing meeting/presentation where the information may be expanded upon and any written communications can be explained verbally.

Briefings or presentations should be attended by the Educational Visit Co-ordinator/ Targeted Youth Service Team Leader and the Group Leader and / or supervisors who will be actually leading the groups during the visit. This will allow parents to question the actual leader of the visit. A record should be kept of parental questions, concerns raised, and action taken to address them. Any relevant information arising out of the briefings/presentations should be given to all parents including those unable to attend.

It is vital that appropriate and clear language should be used in any communication to parents concerning educational visits, in order to minimise potential misunderstanding. Where English is a second language or is not spoken by parents it will be necessary to arrange for interpreters.

#### Parental Consent and Responsibilities

Parents or guardians should prepare their child for the educational visit; for example, by re-enforcing the educational visit's code of conduct and providing suitable clothing etc. Parents should be asked to agree arrangements for any circumstances where it may be necessary to send a child home early and where necessary agree to meet any costs.

It is important that parents recognise their responsibility regarding the educational visit, as such they should: -

Fill in and sign the Parental Consent Form. A consent form should be completed for each group member. Generic consent forms may be used for routine educational visits that form a regular part of the school curriculum but high risk and residential activities should each have their own consent form.

- Provide a contact address and where possible two emergency contact telephone numbers.
- Recognise that child's behaviour must not put themselves or others in danger.
- Provide personal details of their child including relevant details of any allergies, phobias, injuries or medical conditions and / or any other medication or dietary requirements.



- Provide sufficient quantities of any medication that may be required and agree the arrangements for its safe keeping and administration with the Group Leader.
- Provide the name, address and telephone number of the child's GP.
- Provide details as to whether the child suffers from travel sickness, toileting difficulties or has any night-time tendencies such as sleepwalking (for residential visits).
- Provide any other relevant information that the parent thinks should be known.
- Provide appropriate clothing and equipment.
- Meet with the Group Leader or Educational Visits Co-ordinator who has organised the visit in order to resolve any queries.

#### Medical Consent

This forms part of the parental consent. Parents should be asked to agree to their child receiving emergency treatment where it is considered necessary by medical authorities. If parents do not agree to this, Head Teachers / Targeted Youth Service Area Managers may decide to withdraw the child from the visit given the additional burden of responsibility this would place upon the Group Leader.

#### If parents withhold consent

If parents withhold consent the child/young person must not be taken on the educational visit. In such circumstances and where possible the curricular aims should be delivered to the child/young person in some other way. If parents give a conditional consent the relevant Head Teacher / Targeted Youth Service Area Manager will need to consider whether the child/young person is to be taken on the educational visit or not given the additional burden of responsibility this would place upon the Group Leader.

#### Contact between parents and pupils

Head Teachers and / or Group Leaders must ensure that parents can contact their child and the Group Leader in the event of a home emergency, either directly or via an Emergency Contact. For non-routine educational visits arrangements should be made for parents to be informed by the school, youth centre or venue of the group's safe arrival at the final destination and / or at agreed travel stages. Arrangements must be made and agreed with parents so as to allow children/young people who may wish to speak to their parents individually to do so.

#### 4.8 RESPONSIBILITIES OF THE EMERGENCY HOME / SCHOOL CONTACT

The Emergency School / Home-base Contact must be a responsible adult (usually a senior member of staff) who can be available to respond to an incident throughout the duration of the visit. The School / Home-base Contact must never be the parent of one of the children or young people participating in the visit, as they need to be emotionally detached from any situation that may arise. The School / Home-base Contact must be familiar with Liverpool City Council's Educational Visits Health and Safety Policy. It is advisable to have more than one School / Home-base Contact if the educational visit or activity is to last more than one day. If there is more than one, the School / Home-base Contacts, contacts must make such arrangements between themselves as necessary to ensure the availability of at least one of them at all times. The Group Leader must hold all School / Home-base Contact telephone numbers.

The Emergency School / Home-base Contacts have the following duties: -



- Ensure that they have all the relevant information about the visit in the 'Home-base Emergency Pack' (see section14).
- Keep the 'Home-base Emergency Pack' by their telephone along with a pen and paper for making notes.
- Be prepared to receive a phone call from the Group Leader on arrival at, and / or return from the venue. Record any phone calls regarding the visit on the pre-planned phone call sheet.





## 5.0 SUPERVISION & STAFFING RATIOS

For every educational visit there must be a designated Group Leader who oversees the entire visit and has the overall responsibility for supervision during the visit.

It may be necessary for groups to be split during the educational visit when undertaking particular activities. Each sub-group should have a competent supervisor. Supervision will be most effective, when all supervisors and group members clearly understand the aims and objectives of the educational visit and supervisors have a reasonable knowledge of the children/young people, (including any special educational, medical needs or disabilities), and when the educational visit and activities are carefully risk assessed and managed safely. This includes laying down clear guidelines for standards of behaviour, which all on the educational visit must adhere to.

As long as there is adequate supervision not all supervisors need be on duty all the time, however duty supervisors need to be able to respond appropriately to emergencies. Duty supervisors must not consume alcohol or be under the influence of any other substance. Supervisors who are off duty are expected to behave in a professional manner.

### 5.1 SUPERVISION STRATEGIES

There are three types of supervisory strategy described within this section; Close, Distant and Remote. Although the choice of strategy should not be based solely on age, older, more experienced young people should be expected, under normal circumstances, to understand and achieve more and may not require such close supervision. Regardless of how the group is supervised the identities of all group members must be known to all supervisors and the Group Leader. The overall group management, routes of communication and headcount procedures must be agreed and known. The destination location must be known, pre-visited where possible and risk assessed along with any activities to be undertaken.

#### Close or Direct Supervision

This strategy involves group members undertaking activities in close or direct contact with their Group Leader/supervisors. Examples that require this level of supervision may include visits involving young or inexperienced group members, group members with special educational or behavioural needs, when undertaking particularly hazardous activities or when it is identified as necessary by the visit risk assessment.

Large groups that require close supervision should have a simple communication system in place that allows the Group Leader to be free of immediate supervision, so as to allow time to check all is well with all group members and permit immediate intervention when necessary (e.g. during emergencies).

Group movement management systems must be agreed, known and suitable instructions given to all pupils/young people e.g. getting on and off transport, collection points and rendezvous places, crossing roads, walking in urban contexts, provision of buffer zones between the group and any significant hazards.

Behaviour management systems must be known and suitable instructions given to all children/young people e.g. reinforcement, reward strategies; incident intervention strategies; codes of conduct (general and particular to activities). This may involve the final sanction of returning to base or returning the child home to the parents.

#### Distant Supervision

This strategy involves group members working in small parties; with leaders or supervisors continuously monitoring the group and intervening where necessary. Examples may include visiting a museum or non-hazardous fieldwork (e.g. away from water).

This strategy should only be employed where there has been either a history of a particular group / type of visit working well using this type of supervision and / or the visit risk assessment identifies it as an acceptable control.



Before considering distant supervision there must be a reasonable expectation of suitable behaviour by group members (evidenced from working with them previously or elsewhere, not just hoped for).

The geography / physical area of location visited should be clearly defined. It may be necessary to introduce the group to the area and its boundaries before exercising distant supervision. Group numbers must be clearly established (e.g. minimum of 4 members but not so large as to be intimidating). Group member behaviour and code of conduct must be reinforced along with expectations for the group prior to the visit.

All group members must know who the Group Leader and Supervisors are and where they will be; some supervisors should be in a known location, others should be monitoring or moving through the activity area. Group members must be clear about what to do if they get lost or if there is an incident or emergency.

'Down time' during a residential educational visit usually requires distant supervision. Poor procedures can cause serious incidents or create the possibility for them to occur. All group members should be made aware of their responsibilities and what their behavioural expectations are. Parents must be informed before the visit if any form of distant supervision likely to take place.

### Remote Supervision

This strategy entails the Group Leader or supervisors not being with the group during stages of the venture; it often involves monitoring from a distance and checking on progress at suitable intervals during agreed meetings or rendezvous.

The aim of educational visits for older children / young people may be to encourage independence and the development of investigative skills. Some adventurous activities such as those under the Duke of Edinburgh Award Scheme require children / young people to work in small groups without direct supervision. Some academic fieldwork may be remotely supervised.

Remote supervision is technically harder to manage than other supervision strategies and this requires a well qualified and experienced Group or Activity Leader to provide suitable training for group members in the activity prior to the educational visit. Particular attention needs to be given to information provided to children/young people before direct or distant supervision can be withdrawn. Training given to children / young people must be sound and thorough and individual capabilities should be suitably assessed.

The Group Leader must establish during the educational visit's planning stage whether each child / young person is competent for remote supervision. The Group Leader must be satisfied that all have acquired the necessary skills and have the necessary experience, confidence, physical ability and judgement to be left without direct or distant supervision.

Remote supervision should normally only be implemented at the end of a phased development programme. The withdrawal of direct or distant supervision should be a gradual four-stage process; the group's success in coping at each stage should be reviewed before proceeding to the next stage. The four stages include the Group Leader / competent Supervisor: -

- Accompanying the group.
- Shadowing the group.
- Checking regularly at agreed locations.
- Checking occasionally at agreed locations.



The Group Leader remains responsible for group members whether or not they are in direct contact with the group. Any monitoring system must allow for intervention if or when needed. Group support processes should be in place locally as well as at school/home-base should an incident or emergency take place.

Parents must be informed before the visit if any form of remote supervision is to take place.

In addition when supervision is remote: -

- Groups must be sufficiently trained and assessed as competent for the level of activity to be undertaken including any first aid and emergency procedures, will be familiar with the environment or similar environments and have details of the rendezvous points.
- Clear and understandable boundaries are set for the group.
- There must be clear lines of communication between the group, the Group Leader and the school or Targeted Youth Service team leader. They should not rely exclusively on mobile phones.
- The Group Leader or competent Supervisor should monitor the group's progress at appropriate intervals.
- The Group Leader or competent Supervisor will be in the activity area and be able to reach the group promptly should the group need support in an emergency.
- There should be a recognised point at which the activity is completed / terminated.
- There should be clear arrangements to terminate the activity when it cannot be completed safely.

## **5.2 HEADCOUNTS**

Whatever the length and nature of the educational visit, regular head counting of children must take place. Headcounts must be taken by a responsible member of staff using a checklist of names. Headcounts must be taken at every departure and at suitable times during a visit. When undertaking the headcount the checker must physically see the person before ticking their name on the checklist. All Supervisors should carry a list of all children and adults involved in the educational visit at all times. Children, particularly in years 1 to 3 should be easily identifiable, especially if the visit is to a densely populated area. Hi-visibility bibs or caps may help, but children should not wear name badges on show. However it may be useful to provide badges displaying the name of the school or an emergency contact telephone number.

## **5.3 SUPERVISORY AGREEMENTS WITH ACTIVITY PROVIDERS**

Many groups attend day or residential educational visits to centres or organisations that provide activity sessions. It is important to remember that overall pastoral care for the group remains with the Group Leader and competent Supervisors with the support of designated responsible adults.

Activity coaches and instructors must be appropriately qualified and competent. They are responsible for the technical care of the group during any activity sessions they manage. It is vital to agree a handover of responsibility for children / young people at the start and end of an activity session. To avoid problems the handover should be explicit to all group members and instructors, be in a known place and involve the Group Leader.

## **5.4 ADULT TO CHILD / YOUNG PERSON RATIOS**



Activity and Visit Leaders must ensure that young people are supervised in accordance with the principles of “Effective Supervision”, requiring them to take account of:

- The nature of the activity (including its duration).
- The location and environment in which the activity is to take place.
- The age and gender (including developmental age) of the young people to be supervised.
- The ability of the young people (including their behavioural, medical, emotional and educational needs).
- Staff competence.

This means that arrangements for supervision must take into account the nature of a group and the individuals in it. It is therefore important that, when planning a repeat visit or a series of activities, the previous plan (no matter how well it worked in the past) is reviewed to ensure it meets current group needs. Ratios are a risk management issue, and should be determined through the process of risk assessment. It is not possible to set down definitive staff/student ratios for a particular age group or activity.

As a general guide for visits to low risk sites; for example, a museum under normal circumstances, supervisory ratios might be: -

- 1 adult for every 6 children in school year 1 to 3 (under 5s reception class would have a higher ratio, it is not unusual for this to be 1:1).
- 1 adult for every 10 to 15 children in school year 4 onwards.
- Please note when organising residential visits or visits abroad there should be a minimum of 3 adults; this is in case a member of the supervisory team is injured, taken ill or requires to be accompanied to hospital. In rare cases where 3 members of staff are not available, a robust system must be in place and clearly risk assessed to cover any eventuality.

A useful framework for assessing requirements for ratios and effective supervision is SAGE:

- Staffing: who is needed/available? The plan must work within the limits of available numbers, abilities and experience.
- Activities to be undertaken: what do you want the group to do and what is possible?
- Group characteristics: prior experience, abilities, behaviour and maturity, any specific or medical/dietary needs.
- Environment: indoors or out; a public space or restricted access; urban, rural or remote; quiet or crowded; within the establishment grounds, close to the establishment or at a distance; and the ease of communications between the group and base. Do not overlook environments to be passed through between venues. For residential visits consider the accommodation and surrounding area. For outdoor environments, consider remoteness, the impact of weather, water levels and ground conditions.
- Distance: how far are you away from school or emergency support?



The table below offers more detailed guidance which applies where the Group Leader and Supervisors are experienced and competent and should be used as a starting point when considering ratios:

|  |   |   |
|--|---|---|
| <p>Local Visits<br/>Visits in the local area close to support at school/base (minimum 2 staff recommended)</p>   | <p>Reception better than 1:6<br/>Years 1-3 1:6<br/>Years 4-6 1:10-15<br/>Years 7-13 1:15<br/>(one supervisor per activity or supervision group)</p>   | <p>A minimum of one qualified and competent Group Leader is needed for every group or class; they can be supported by other responsible adults.</p>   |
| <p>Day Visits<br/>More than 60 miles or one hour from school/base (minimum 2 staff recommended)</p>  | <p>Reception better than 1:6<br/>Years 1-3 1:6<br/>Years 4-6 1:10-15<br/>Years 7-13 1:15<br/>(one supervisor per activity or supervision group)</p>   | <p>Please note minimum ratios are not recommended but small working groups of 6-12 remain the target.</p>   |
| <p>Residential Visit, UK or abroad<br/><br/>(minimum of three supervisors recommended, any less needs a thorough risk assessments and emergency management plan)</p> | <p>Reception better than 1:6<br/>Years 1-3 1:6<br/>Years 4-6 1:10<br/>Years 7-13 1:10<br/>(one supervisor per activity or supervision group, these do not include any centre residential staff)</p> | <p>Supervisors should reflect the gender of the group wherever possible</p>   |
| <p>Open Country<br/>Working by water or away from a road or building</p>   | <p>Reception better than 1:6<br/>Years 1-3 1:6<br/>Years 4-6 1:10<br/>Years 7-13 1:12<br/>(one supervisor per activity or supervision group, these do not include any centre residential staff)</p> | <p>Overall group sizes above 20 are not recommended at any one location at a time (supervision and sustainability issues). Similarly large groups should not be moving together in convoy. The numbers of qualified leaders will depend on the risk assessment.</p> |

Parents and volunteers may be asked to supplement the supervision ratio. They should be carefully selected and ideally they should be well known to the school. Anyone who has not had a Disclosure and Barring Service DBS check should never be left in sole charge of children/young people.

Teachers, staff and other adult-supervisors should ensure that whenever possible they are not alone with a child/young person. This provides protection for all parties.

The ratios and supervision strategies need to be complemented by a clear knowledge of the competence of those supervisors, volunteers and other responsible adults.

#### The Need for a Higher Level of Supervision

Aside from the generic advice given on ratios within this section, the educational visit risk assessment should identify a suitable adult to group member ratio. The assessment should take into account the visit venue, its environment, the Group Leader's and Supervisor's qualifications, competencies and experience, as well as the age and experience of the children / young people in the group.



The number of adults should be increased if: -

- It is found that the environment or location of the educational visit site or activity presents significant hazards; e.g. poor visibility, poor security including risk of terrorism or prevailing physical hazards.
- If it is known that a group's, or an individual group member's behaviour or needs (education, physical or medical), requires particular management. This could mean a ratio as low as 1:1 in some circumstances with additional staff not being tied into other agreed supervision ratios.
- Teachers/Youth Leaders are inexperienced and are accompanying the group as part of an 'apprenticeship' to gather experience; this may mean them not being included in calculated supervision ratios.

## **5.5** CROSSING ROADS

This is undoubtedly one of the more dangerous activities that group leaders and supervisors will manage. Technically within the UK only the police, traffic wardens and officially designated crossing patrols have the right under law to control traffic. It is therefore important that there is a clear and agreed procedure that can be applied to reduce the risks. If possible there should be three supervisors present if crossing a group across a main road.

The following control measures may be used in drawing up such a procedure: -

- Where possible pre-visit the location; map out the intended walk route, so as to avoid the need to cross busy roads as far as is practicable.
- Where crossing a road is unavoidable, a safe crossing site must be chosen; where visibility is good in both directions (at least 100 metres) and there is a suitable collection point on both sides of the road; an area off the road preferably a pavement area.
- Gather the group on the inside of the pavement area at least one metre from the kerb.
- A wave of group members in controlled numbers crossing the road is recommended over the "crocodile approach".
- Decide on a manageable number of children/young people that can cross in a controlled line, line them up parallel to the kerb.
- One Group Supervisor should be positioned over the road before crossing the group. The group should approach the roadside on a suitable signal or command.
- If there are three Supervisors present, one should remain in control of the group at the set off point, one should remain at the collection point and one should cross the road with the group. Where there are two Supervisors, one supervisor should walk the group half way across the road to be met by the other supervisor who will continue walking the group to the collection point. The first supervisor will return to the remainder of the group at the set off point.
- Great emphasis must be placed on crossing roads and understanding traffic direction when abroad.

## **5.6** THE BUDDY SYSTEM

The buddy system is a way of creating a culture of partnership between staff and group members. This is ideal for residential based educational visits or activities that may last for more than one day. An 'Educational Visit Council' may be set up involving more mature group members from each educational visit group, who will help to make decisions on how the visit or activity is run and feedback any concerns the rest of the group may have. To be



successful, meetings should be held with the Group Leader on a regular basis. Assigned group members may offer limited support to staff at break and lunchtimes, as monitors. This does not remove any responsibility for the pastoral care of the group from the Group Leader or supervising adults.



## 6.0 RISK ASSESSMENTS

Risk assessment and risk management are legal requirements. For educational visits it involves a careful examination of what could cause harm during the course of the visit. Risk assessment should be proportionate to the hazards associated with the visit. Those visits which require local authority approval should be assessed formally and assessments recorded, for day to day low risk activity a more flexible approach is acceptable. Risk assessments must be recorded, either as part of lesson plans, schemes of work, or model risk assessments can be used. It does not require professional health and safety expertise but may require specialised information for some types of visit. Head Teachers, Targeted Youth Service Area Youth Coordinators and Facility Managers should ensure the person assessing the risks is competent to do so. The aim of the risk assessment is to ensure nobody gets hurt or becomes ill during the course of, or as a result of the educational visit. Examples of risk assessments common to Educational Visits can be found under the resources tab on EVOLVE, these are guidance documents and should be modified accordingly to your trip.

A risk assessment involves five simple stages: -

1. Identify the hazards. Identify what could reasonably be expected to cause harm. Concentrate on significant hazards, or those that could harm several people.
2. Decide who might be harmed and how. Consider children/young people, teachers, youth workers, helpers, leaders and others who could be affected by the visit activities.
3. Evaluate the risks. Regarding how likely it is that harm will be done and the severity of the likely outcome. You have to decide for each significant hazard whether the risk is high (*an accident likely with the possibility of serious injury or loss*), medium (*there is a possibility of an accident occurring causing minor injury or loss*) or low (*an accident is unlikely with control measures in place*). Decide what safety measures need to be in place to get rid of the hazard, or reduce the risk so harm is unlikely. Control measures should be practical and be understood by those involved. It is likely that some risk will remain after all the control measures have been put in place but this risk must be low.
4. Record your findings and control measures. You must record the significant findings from the assessment. You must be able to demonstrate that a proper check was made, the assessment acknowledges those who may be affected, all significant hazards were dealt with, the precautions to be put in place are reasonable and the remaining risk is low.
5. Review and revise your assessment. This should be carried out annually or when necessary. On return to school note any hazards that arose which might affect future visits.

For further guidance the Health and Safety Executive has produced a leaflet "5 Steps to Risk Assessment" available from the City Council's Health and Safety Unit

For all visits that involve hazardous activities (categories B and C as described in section 3 "Planning an Educational Visit" of the policy document) and for all residential activity risk assessments should be completed on LA form 2, found under resources on EVOLVE.

For low risk activity (category A as described in section 3 "Planning an Educational Visit" of the policy document) assessments must be recorded, either as models in schemes of work or can form part of lesson plans, or can be recorded by completing LA form 2, found under resources on EVOLVE.



# Risk Assessment and Risk Management Record

**School/Youth Group** [Click here to enter text.](#)

**Learning activity** [Click here to enter text.](#)

**Group Leader** [Click here to enter text.](#)

**Other staff** [Click here to enter text.](#)

**Group size** [Click here to enter text.](#)

**Supervision ratio** [Click here to enter text.](#)

| IDENTIFYING AND ASSESSING THE RISKS |  | RISK LEVEL          |      |               | CONTROLS FOR MANAGING THE RISKS |  |     | REMAINING RISK |        |               |
|-------------------------------------|--|---------------------|------|---------------|---------------------------------|--|-----|----------------|--------|---------------|
|                                     |  | <b>High/Med/Low</b> |      |               |                                 |  |     |                |        |               |
|                                     |  | Severity            | Prob | Level (S x P) |                                 |  |     | Severity       | Prob   | Level (S x P) |
| <b>Heading</b>                      |  |                     |      |               |                                 |  |     |                |        |               |
| •                                   |  | 1-5                 | 1-5  | select        | •                               |  | 1-5 | 1-5            | select |               |
| •                                   |  | 1-5                 | 1-5  | select        | •                               |  | 1-5 | 1-5            | select |               |
| •                                   |  | 1-5                 | 1-5  | select        | •                               |  | 1-5 | 1-5            | select |               |

Form Completion date: \_\_\_\_\_

**Risk Assessment Matrix**

|             |   |          |     |      |      |      |
|-------------|---|----------|-----|------|------|------|
|             |   | Severity |     |      |      |      |
|             |   | 1        | 2   | 3    | 4    | 5    |
| Probability | 5 | Med      | Med | High | High | High |
|             | 4 | Med      | Med | High | High | High |
|             | 3 | Low      | Med | Med  | Med  | High |
|             | 2 | Low      | Low | Med  | Med  | Med  |
|             | 1 | Low      | Low | Low  | Med  | Med  |

|  |  |
|--|--|
| Points the Group Leader or team to be aware of |  |
|  |  |
|  |  |
|  |  |
|  |  |

## 7.0 INSURANCE ARRANGEMENTS FOR EDUCATIONAL VISITS

No educational visit should go ahead unless there is adequate insurance in place.

The LA's Liability Insurance cover for schools is a combination of external insurance and self-insurance arrangements, educational visits are covered by external insurance. Schools that contribute to the Liverpool City Council's service level agreement for insurance/risk services are covered by this scheme, Liverpool Targeted Youth Service groups are also covered. Details of what is covered can be found on EVOLVE under resources.

Schools that have chosen not to contribute to the SLA for insurance / risk services will not be covered by the LA's educational visits insurance.

Schools and other facilities organising Educational Visits should ensure that centres to be visited are suitably insured, e.g. they should ask for documentary evidence of public liability insurance cover. Venues that are not adequately insured should not be used. Schools and other facilities should also ensure all vehicles used for transport during an Educational Visit carry fully comprehensive business use insurance.

Liverpool City Council provides insurance cover for Educational Visits. The scheme will provide personal accident / travel cover for all Liverpool schools that contribute to the service level agreement for insurance / risk services for schools. Educational visit insurance extends to Targeted Youth Service establishments.

For those schools that have accepted the local authority's service level agreement for insurance, the policy is only activated by submission of the Educational Visit on EVOLVE by the Headteacher

Though the uptake of this cover is not mandatory it is strongly recommended (to ensure suitable cover has been put in place).

Visits requiring cover by the educational visits insurance are those for which Local Authority approval is required.

**If a visit requiring approval does not have approval the visit may be covered under the LA insurance.**

All other educational visits such as non-residential or low risk activities (such as a museum visit) will be covered by the "self-insurance scheme" managed by the LA.

Those schools that do not wish to use the LA insurance will be required to provide details of the insurance company and the level of cover they wish to use along with proof that it is suitable for the visit. This information must be attached to the form submitted through EVOLVE.

## 8.0 TRANSPORT

### 8.1 MINIBUS POLICY

This section provides a summary of the guidance contained in Liverpool City Council's Occupational Road Risk Policy and the Corporate Drivers' Handbook and as such can be used as a checklist during the planning of an educational visit after reading the full document.

Vehicles must: -

Be regularly and suitably maintained & inspected. A designated member of staff should hold the responsibility for overseeing maintenance and care of the minibus. Any defects should be reported immediately and appropriate remedial action taken. All necessary repairs must be carried out before use. Maintenance and other records should be kept for at least 3 years. Containers of fuel must NOT be carried.

Carry a suitable fire extinguisher. E.g. foam/carbon dioxide, and should be readily available for use.

Have clearly indicated emergency exits. Passengers should be made aware of them.

Have suitable first aid provision (at least two first aid boxes) readily available for use.

Have passenger and driver seat belts fitted and available for every person on the minibus, the driver is to ensure they are used.

Ideally have high back seats to protect against whiplash. Vehicles with side facing seats should not be used.

Have adequate wheelchair & passenger restraints provided where wheelchair users are to use the minibus.

Have a register of all adults authorised to drive the minibus and their competencies e.g. undertaken MIDAS assessment. A record of the use (Vehicle Mileage/Log) of the minibus should also be maintained.

Have an Operating Permit. A minibus that is used to carry passengers for "Hire or Reward" is normally classed as a Public Service Vehicle (PSV). It must therefore comply with PSV Operator Licensing and Passenger Carrying Vehicle Driver Licensing requirements. Some schools and voluntary organisations may be exempted from these requirements if they are eligible for a 'Minibus Permit' granted under section 19 of the Transport Act 1985. For further information see Liverpool City Council Occupational Road Risk Policy and Corporate Driver's Handbook.

Have an approved towing bracket if it is necessary to connect a trailer to the vehicle. Drivers unfamiliar with towing trailers should take a practice drive to master manoeuvring and reversing. Trailers should be suitably maintained and inspected. A second adult should assist the driver in confirming that trailer lights work properly before commencing a journey. A maximum speed limit of 50 mph. should be observed when towing.

Drivers must:

- Be at least 21 years of age.
- Hold a suitable full driving license.
- Have successfully completed suitable training and assessment.
- Have appropriate health and driver training records.
- Notify the Head Teacher/ Targeted Youth Service Area Coordinator if there is any change in their circumstances that may affect their suitability to drive.
- Carry out a vehicle check prior to using the vehicle.
- Be familiar with the vehicle and highway codes before carrying passengers.

Minibus Driver Entitlement

Voluntary drivers who hold Category B (post 1997 car entitlement) can drive a mini bus if all the following are met:

- The driver has held a Category B licence for at least 2 years.
- A non-commercial body is using the minibus. (Whether a school is a non-commercial body will depend on its status. The majority of schools are considered as being non-commercial organisations. However some independent schools may lack charitable status and be classified as commercial).
- The driver can not be compelled by his employer to drive.
- Driver is only paid out of pocket expenses and not specifically for the driving.

The minibus can be operated for "hire or reward" if a (Section 19) Minibus Permit is held and the following additional conditions are met: -

- The minibus has a capacity of up to 16 passengers.
- The driver is aged 21 or over.
- The maximum weight of the minibus is not more than 3.5 tonnes. This excludes any specialist equipment for the carriage of disabled passengers were a maximum weight of 4.25 tonnes will be permitted in certain circumstances.
- The driver cannot tow a trailer.

For more information regarding D1 (PCV) and pre-1997 car licence entitlement read "Minibus Driver Entitlement" within Liverpool City Council's Occupational Road Risk (Driving at Work) Guidance Note GN28.

#### Driver Responsibilities

- Prior to using the minibus the driver must check the essential elements of the vehicle (see "General driver pre-journey checks", below) and report any defects in writing.
- If a major defect occurs en-route, the journey must stop until the defect has been repaired by a competent person. It is recommended that drivers have access to a mobile phone for use in case of emergency but must not be used by the driver whilst driving.
- Luggage should be stowed safely and neatly so it does not obstruct gangways or exits. Roof racks when used, should have goods evenly distributed on them and suitably secured.
- Drivers are legally responsible for the vehicle they are driving and should observe current legislation for driving, (speeding, parking restrictions etc).
- It is the driver's responsibility to ensure the vehicle is not overloaded with passengers or goods and that seatbelts are worn.
- Drivers must never drink or be under the influence of any other substance and drive. Alcohol can remain in the blood for up to 24 hours, therefore it is considered good practice that alcohol is not consumed 12 to 24 hours before driving.
- If drivers become tired or unwell they must stop at a suitable place until they recover.
- Drivers are responsible for returning the bus in a suitably clean and tidy condition.
- In case of fire or other emergency, a driver's primary responsibility is the health and safety of his passengers by ensuring they leave the vehicle quickly to an area of safety. They must be protected from other vehicles as far as possible.

- The fighting of engine or other fires is best left to the emergency services.
- Drivers should ensure that passengers are suitably supervised. An additional adult should act in a supervisory capacity for journeys with young children, disruptive children or those with educational needs.

#### Drivers Hours

- Before starting out on a journey due consideration must be given to the time to be spent 'at work' (not simply behind the wheel) and the distance to be covered. Wherever possible a relief driver must be carried to cater for a long journey or in case of illness. In addition : -
- Drivers must take a break of at least 15 minutes after driving for 2 hours.
- Drivers must not be behind the wheel for more than 6 hours during a working day (for 'professional' drivers this limit may be increased to 8 hours).
- The length of a driver's working day must not exceed 10 hours i.e. between starting work (not just starting driving) and finishing.

#### General driver pre-journey checks

- The vehicle handbook that lists the manufacturer's details; covering the design and operational standards should be available to the driver.
- Brakes and steering operate correctly.
- All lights, instruments and horn operate correctly.
- Windscreen wipers and wash operate correctly. Adequate supply of windscreen wash fluid.
- Correct fluid levels – fuel, oil, brakes, coolant etc.
- First aid kits are in place.
- Fire extinguisher, is in place.
- Windows clean and there is good visibility.
- Tyres should be free of cuts and cracks, correctly inflated and have a minimum of 2.0mm of tread.
- All luggage and other objects should be suitably and safely stored.
- Spare tyre carried, in good condition, satisfactorily inflated. Wheel changing equipment present.
- Internal (and external mirrors where fitted) are in good condition and correctly aligned.
- Seat belts are working correctly.

#### No smoking

- It is illegal to smoke in a public vehicle neither drivers or passengers in may smoke

## 8.2 THE USE OF PRIVATE CARS

It is possible for the Group Leader, supervisors, other staff and adult volunteers to use their own cars, for transporting group members providing that: -

- The Head Teacher / Targeted Youth Service Area Manager has agreed the use of private cars as part of their overall transport policy.
- Any money paid for its use is not more than the vehicle's running costs (no hire or reward) and arrangements for any payments are made or agreed before the journey.
- Evidence is provided that the vehicle is insured fully comprehensively and for business use.
- The driver recognises they have a duty of care to passengers, road users and others and are known to be responsible adults.
- Simple checks should be made to confirm the vehicle's road-worthy condition such as MOT.
- Evidence of driving ability should be drawn on and if necessary simple checks made.
- Cars must not be overloaded.
- Each passenger should have their own seat and suitable seatbelt.
- If private cars are to be used for long journeys there should be arrangements made (RAC, AA etc.) for breakdown assistance and recovery.
- The names of the children/young people being transported in each car should be kept by the school/youth centre organisation so that in the event of an accident the school/youth organisation is aware of the children who are involved.
- Parent/adults are never alone with any child/young person.
- Driver's licences should be checked.
- Seat belts are working and if applicable correctly fitted child seats are used.

This section should be read in conjunction with child protection procedures. Some parents may not want their child/children to travel with other parents, or with particular parents. They should be given the opportunity to make their views known.

### **8.3 HIRING OF COACHES**

The primary consideration in the carriage of children is safety, where numbers make the use of minibuses impractical coaches should be used. Legislation requires that coaches have seat belts. Staff supervising on coaches should check that all group members are all wearing their seat belts. There is no requirement for younger children travelling on a coach to be held in a child car seat or booster seat. They should use the existing seat belt system. Schools/Youth groups should ensure they use reputable coach companies with proven maintenance checks and policies such as a tyre aging policy.

### **8.4 USE OF PUBLIC SERVICE VEHICLES (BUSES)**

Some groups may wish to use a public service bus as a means of transport or as a learning experience for children, this is a useful exercise.

If used choose times to travel where buses are empty and will have sufficient space for the whole group to be seated.

Risk assess the journey, take sufficient staff to ensure the children are suitably supervised.

The group should remain seated until the stop is imminent. Supervisors should indicate to the children when to stand to leave the bus, a member of the supervisory team should be the last member of the group to leave the vehicle.

This means of transport is not appropriate for large groups of children.

## 9.0 SWIMMING ON EDUCATIONAL VISITS

The opportunity may arise for children/young people to swim during an Educational Visit, either using swimming pools or in open water. Group Leaders must ensure that relevant regulations are adhered to. If the requirements outlined below cannot be met, swimming must not be permitted. Prior permission must be obtained from the parents or guardians of any pupil, prior to including them in swimming activities.

### 9.1 SWIMMING IN PUBLIC POOLS

Free swimming in a public pool presents greater risks to the swimmer than organised swimming lessons. A basic rule is that the group must be observed at all times. Check if there is constant supervision by a sufficient number of qualified lifeguards. Group Leaders must follow the recommended supervision levels at the pool for their group as a minimum standard. A minimum ratio should be: -

|                       |                                      |
|-----------------------|--------------------------------------|
| School years 4 to 6   | 1 adult per 12 children/young people |
| School year 7 onwards | 1 adult per 20 children/young people |

Teachers should monitor the risks of regular swimming activities and adjust supervision levels as necessary. For all swimming pool Educational Visits, the Group Leader must check: -

- The water is clear and its temperature is appropriate.
- The depth of the water is suitable for the activity, e.g. deep enough for safe swimming or shallow enough to allow children to stand up during swimming lessons. There should be signs clearly indicating the water's depth.
- If supervisors or children with disabilities are to use the swimming pool ensure there are suitable facilities for their needs; especially in the event of an emergency evacuation.
- There is poolside communication e.g. telephone, intercom or emergency alarm button.
- There is suitable poolside rescue equipment and if there is someone trained to use it.
- There is a suitable changing room for each gender.
- That the changing facilities are safe and hygienic.
- That clothes and belongings can be stored securely.
- That group members have been instructed in how to behave in and around the water.

#### Supervision

The Group Leader has overall responsibility of children/young people during the educational visit.

The Group Leader must ascertain that lifeguard cover is provided by the swimming pool operator. If there are no qualified lifeguards available children/young people may not use the pool. Staff/appointed adult may only act as a lifeguard if they hold a Royal Lifesaving Society National Pool Lifeguard Qualification stating their competence to affect a rescue from a depth greater than or equal to the depth of the pool being used.

A national rescue test for swimming teachers and coaches is classed as an acceptable qualification only whilst the children are following a structured session, under instruction from a teacher. This award does not cover you to act as a life guard during any "fun/play" sessions. You must also have another adult present during the activities who is able to get help if required.

The Group Leader or an appointed assistant must observe the group from the poolside and be prepared to alert the lifeguard if a child/young person is in difficulty. This observer must be conversant with pool operating regulations and emergency procedures.



The Group Leader must ensure that: -

- Group members know how to summon help in an emergency.
- Group members are aware of the signal for leaving the water.
- Group members are counted in and out of the water.
- Good discipline and pool rules are observed at all times.
- Rough play; such as 'bombing', running and unnecessary noise are forbidden.

Medical considerations

The Group Leader must be aware of children/young people with any medical conditions that may affect their safety or that of others during the activity. In the case of epilepsy, the instructor must be made aware of whom the child/young person is and should be provided with brief information as to the form the seizures take. Medical clearance must be obtained from both the parents and medical practitioner. Epileptics may be required to have a spotter to provide one-to-one supervision whilst in the pool.

Diving

Diving may only take place where the water has a vertical depth of at least 1.8 meters and a forward clearance at this depth of a minimum of 7.6 meters and must be supervised by a competent supervisor who has no other responsibilities during the lesson.

## **9.2** SWIMMING IN OPEN INLAND WATERS

Many educational visits will have open water as a feature of the area visited. Open inland water such as rivers, lakes, reservoirs or canals present unacceptable risks to swimmers. These include vegetation and other underwater obstructions, sudden changes in depth, and temperature as well as pollution. *Authority Regulations prohibit swimming in open inland water.* The only exception is where swimming takes place as part of a water-sports activity such as canoeing, which must only be permitted if it forms part of the organised programme and it must be in accordance with relevant Local Authority Regulations.

## **9.3** SWIMMING IN THE SEA

The risks to those swimming in the sea are considerably greater than those presented by a heated swimming pool. Swimming ability is further reduced by heavy waves, low temperatures, and undercurrents. The age and ability of the swimmers, the conditions of the sea, beach and weather, the presence of beach lifeguards, the life-saving ability of the adult in charge, and the safety equipment available should be taken into account when deciding to swim. Swimming in the sea must only be permitted if the following conditions are met as a minimum standard: -

- Swimming is a formal and supervised activity in a recognised bathing area that has official surveillance e.g. qualified lifeguard cover.
- A minimum supervision ratio of one to eight with a minimum of two adults present.
- At least one member of staff/supervising-adult must remain on watch at the water's edge and must not swim.
- If no life guard service is available at least one adult holding a current Royal Lifesaving Society National Beach Lifeguard Qualification must be present.
- The permitted swimming area must be defined and clear to all participants.
- Swimmers should swim in water of no more than waist depth and should swim parallel to the shore.

- Before entering the water all participants must be briefed as to emergency procedures including the signal to leave the water.
- Children/young people must be counted on entering and leaving the sea.
- The following life-saving and safety equipment should be available during the session: -
  - A whistle.
  - Floats or throw-line.
  - First aid equipment.
  - Warm clothing.
  - A reflective blanket.
  - Survival bag.
  - A beach assembly marker e.g. poles or flags.

## 10.0 FARM VISITS

Farms can be dangerous places with specific hazards that may arise from slurry or grain pits, potentially dangerous machinery, electric fences, uneven and/or slippery ground, chemical and other stores, as well as potentially dangerous live stock. Therefore educational visits to farms require particularly careful planning.

### 10.1 PRIOR TO THE EDUCATIONAL VISIT

Regard should be given to the following issues prior to the educational visit taking place: -

- Prepare the children/young people thoroughly so they know what to expect, and what is expected of them (see code of conduct) during the educational visit.
- Ensure all those attending the educational visit wear suitable clothing and footwear.
- Ensure all those attending the educational visit have been informed of any specific hazards.
- Children/young people should not be allowed in animal pens.
- Preferably undertake an exploratory visit to check the farm suitable for the intended educational visit. It should be well managed, have a good reputation for safety standards, animal welfare and maintain suitable washing and other welfare facilities that can be used by the visiting party.
- Ensure that the farmer or the farm manager is fully aware of the limit of the visiting group's knowledge and awareness of the countryside and of agriculture.
- Discuss and agree the visit requirements, organisation (especially emergency arrangements) and programme of activities with the farmer or site manager.

### 10.2 CODE OF CONDUCT

All those involved in a farm visit should be informed of the required code of conduct prior to the visit and knowledge of that code checked, it should then be constantly enforced during the visit.

The farm-visit code of conduct should include the following: -

- Listen carefully and follow the instructions and information given by the Group Leader and supervisors.
- Do not use or pick up tools (e.g. spades, forks etc.) unless permitted to do so by farm staff and the Group Leader/supervisors.
- Do not ride on tractors or other machinery.
- Do not climb on walls or into animal pens.
- Approach animals quietly and gently.
- Do not frighten or torment animals.
- Do not play in the farm area.

### 10.3 HYGIENE ON THE FARM

All farms have a degree of bacterial contamination. All animals naturally carry a range of micro-organisms that can be transmitted to humans. Some infections such as E-Coli 0157 present a serious hazard as they can potentially cause a severe illness. The risk from such an illness is particularly great to children under the age of six. The risk of infection can be readily controlled by good hygiene practices, these should include: -

- Ensure there are adequate levels of supervision to ensure suitable control.
- No eating or drinking allowed outside of designated eating areas.
- Do not eat food that has fallen on the ground.
- Do not suck fingers or put pens, pencils or other objects your mouth.
- Wash hands, especially before eating, after any contact with animals and before leaving the farm.
- Wear appropriate clothing including suitable footwear (Wellingtons / boots).
- Clean or change footwear before leaving the farm, then wash hands.
- Cover all cuts and grazes especially on the hands with a waterproof dressing.
- Do not place your face against the animals or kiss animals.
- Do not taste any animal foodstuffs.

If a member of the group shows signs of illness (e.g. sickness or diarrhoea) after the visit, they and / or their parent / guardian should be advised to contact the doctor and explain that they have had recent contact with animals.

## 11.0 HILL WALKING, LOWLAND WALKING, TREKKING AND MOUNTAINEERING

There are many locations to visit, that are easily accessible for schools within Liverpool, to undertake walks and climbs.

To ensure that these visits are undertaken in a safe manner with suitably qualified / experienced staff certain visits will require a competency course as a minimum qualification. A competency course is run specifically for the location you will lead the group, following a designated route as covered during the course.

These locations include  
Moel Famua  
Cat Bells

For alternative location please contact the educational visits contact, prior to arranging or booking any visits. When determining the location please ensure that the ability of the child / young people is taken into account.

The expected ratio for these visits would be 1 qualified member of staff per 30 children supported by 2 suitably experienced members of staff.

There is also the requirement to have at least 1 member of staff with a current outdoor first aid qualification.

## 12.0 DUKE OF EDINBURGH AWARD- EXPEDITIONS

The DofE award is a very popular award providing fantastic experiences for young people. The expedition section of the award can present a lot of challenges and is classed as an adventurous activity requiring LA approval submitted 28 days in advance of the expedition.

A successful and safe expedition is achieved by ensuring the following:

- Planning is done in depth and well in advance.
- Staff are qualified and experienced in leading expeditions.
- Ratios of staff to young people are correct.
- Young people are well prepared for the expedition.
- Safety guidance for expeditions is followed.
- The planned expedition is suitable for the ability of the candidates.

When submitting an expedition for approval the following must be included

- Full list of staff including their qualifications / experience for in house run expeditions.
- Additional provider form if using an Approved Activity Provider (AAP)
- Clear route maps and route cards

### Qualifications

The level of expedition will be a factor when determining the qualification / experience required.

Where the expedition is being run in house by school staff they must hold a relevant qualification / experience to lead the expedition. The acceptable qualifications recognised by the LA are listed below.

BEL – Basic Expedition Leadership award is a nationally recognised qualification that trains and qualifies teachers, you the workers and other members of the community to

Lead walking groups in lowland countryside

Impart the knowledge and skills needed to undertake a day walk

Plan and lead overnight base and mobile camps

Lowland Leader – This qualification trains and assesses candidates in the skills required to lead groups on day walks in lowland countryside and woodland in summer conditions.

Hill and Moorland Leader – This qualification trains and assesses candidates in the skills required to lead group in non-mountainous terrain know as upland, moor, fell and down. The peak district, Dartmoor and the Pentland Hills are typical areas where award holders lead groups.

Please be aware the neither Lowland Leader or Hill and Moorland Leader qualifications cover camping or stove use. Further evidence of competence for this activities will be to be provided.

Dependant on the size of the group will depend on the number of staff required. There should be a minimum of 1 qualified member of staff to every 10 pupils supported by staff by suitably experienced staff.

There is also the requirements to have at least 1 member of staff with a current outdoor first aid qualification.

Any pre-expedition training involving the use of stoves must also be submitted on EVOLVE for approval at least 28 days in advance of the activity and must be delivered by the qualified / competent staff.

## 13.0 STAFF CHILDREN ATTENDING VISITS/RESIDENTIAL

When a member of staff has their own child (that is not on their school roll) attend a visit this can create a number of issues

- The parent of the young person may become distracted by the needs of their own child rather than looking to the needs of the whole group
- The group management may be comprised, particularly if there is a serious incident .
- Pastoral issues, does the child "fit in" with the group, how is behaviour to be enforced?
- Child Protection/Safeguarding – if there is any age gap implications for overnight accommodation
- You must ensure all information must be submitted accurately for adventurous / hazardous activities
- Financial – not good practise if the parent / child has benefitted financially from the arrangement (e.g. paid lower than other members of the group)
- Insurance – neither the child or the parent would be covered under the LA insurance as this would be classed as a private trip
- Ratio – due to this being classed as a private trip the member of staff would not be counted in the ratio's for the visit
- 

Based on all of the above staff should not take their own children on school visits or residential if they are not on roll at that school and no insurance cover will be in place for that child or parent.

#### 14.0 BOUNCY CASTLES & INFLATABLES

Bouncy castles & Inflatables can be great fun for children and adults alike, however they can also present a number of dangers and these will be classed as an adventurous / hazardous activity.

Bouncy castles & inflatables hired for use on a school site, for use by school pupils need to be treated as an adventurous activity and must therefore be submitted on EVOLVE for LA approval, at least 28 days before the event.

When hiring any form of inflatable this should be run and managed on the day by the independent company and not the school.

Due to the company being an external provider an additional provider form will need to be completed.

It is recommended that when hiring a bouncy castle provider that you look to the following (taken from the HSE Website)

- Hire off a reputable company that has a numbered PIPA tag attached to the inflatable or ADiPs declaration of compliance to show they comply with British Standard BS EN 14960
- You are able to use the provider website to check safety tests have been carried out
- No inflatable should be used in winds above 24 mph, which is Force 5 on the Beaufort Scale (small trees in leaf begin to sway)

Link to HSE Website: <https://www.hse.gov.uk/entertainment/fairgrounds/inflatables.htm>

Please ensure that the above link is used to consult on the HSE guidance in full before planning your event.

There should be risk assessments conducted by the school regarding the supervision and use of the inflatable, as well as the ones from the provider, as with any adventurous activities.

Bouncy castles hired by other organisations e.g PTA for a school fayre, do not need to be submitted on EVOLVE. They are solely the responsibility of the organiser and there must be separate insurance in place. It is recommended that all of the usual risk assessments etc are completed, however this is NOT a school activity.



## 15.0 USE OF CONTRACTORS (PROVIDERS) AND TOUR OPERATORS

Schools, Targeted Youth Service and other services need to make informed choices about the suitability of contractors of educational visits and outdoor centres in order to ensure, as far as is practicable, the health and safety of the pupils and others involved.

Contracted providers of educational visits include; tour operators, expedition providers, outdoor education centres, local farms, civic museums as well as national bodies such as the Youth Hostels Association.

Accidents can happen even during the most carefully managed activities. When considering an educational visit to an Activity Centre or when planning to use an Activity Provider, schools and other services must satisfy themselves on matters such as the company's safety policy, levels of instructor competence, qualifications and standard of equipment. For example, check that contacted providers hold an up-to-date Adventure Activity Licence, or a Learning Outside the Classroom quality mark as these provide evidence that they comply with nationally accepted standards (see Section 12).

If a provider is being used that doesn't hold Learning Outside the Classroom quality mark you must obtain an additional provider form. There are central provider forms stored within EVOLVE for providers that are regularly used, if your provider form is not here then you must ask them to complete one and attach it to your EVOLVE form. To assist in this assessment the following issues should be considered: -

- Safety Policy Statement

Ask the contracted provider for evidence of: -

- An up-to-date and suitable health and safety policy.
- The way in which the policy is brought to the attention of staff.
- The way in which the contractor monitors his health and safety arrangements.

- Health and safety arrangements

Ask the contracted provider for evidence: -

- That every reasonable measure has been taken to reduce the risk of the occurrence of an accident or ill health.
- Of how the contractor actively promotes the awareness of health and safety amongst his own staff. For example, via training; team safety meetings; accident feedback reports etc.
- Of independent verification of health and safety arrangements e.g. if an external professional body audits the contractor's health and safety precautions.

- Insurance

Ask the centre or provider for evidence that they have adequate public liability insurance and how their insurance policy affects your School or Youth Service insurance cover. Those Schools and Youth Services that are insured by the City Council should contact the Council's Treasury Management/Insurance Unit.



- Provision of accommodation

All accommodation that is to be used for the first time must be checked to ensure it conforms to United Kingdom standards of safety as a minimum requirement. Ask for evidence from the accommodation provider directly or seek it from the brochure advertising it or the Agent supplying it. If feasible request a pre-visit safety guide; this should draw your attention to accommodation's key safety points, in particular fire safety.

- Provision of Services or Equipment

Ask for evidence that equipment supplied by a contracted provider for your use on the educational visit or for an activity is: -

- Recognised regulation equipment purchased by the contractor taking health and safety into account.
- Adequately maintained to a planned maintenance programme, and maintenance documentation is up to date.
- Regularly inspected and examined at the correct intervals.
- Suitably repaired as required and there are effective systems in place for preventing damaged equipment from being used.

- Transport

When coaches or minibuses are to be used, ask the provider for evidence and details of coach safety audits, a copy of the coach company's operating licence as well as motor vehicle and employer's Liability Insurance. Other issues to be checked include: -

- *Seatbelts:* where necessary ensure road transport is fitted with sufficient seatbelts for the relevant group size; in line with current legislation.
- *Driver's Hours:* ensure all itineraries for tours using road transport take into account current legislation on driver's hours and statutory breaks.
- *Driver recruitment:* check contracted coach/minibus companies provide evidence that they have taken reasonable steps to establish their drivers do not have a criminal record or a detrimental employment record.
- *Tyre age policy:* Ensure coaches use tyres no older than 10 years old. If unsure you can use tyre decoder to check [www.tyred.org.uk/decoder](http://www.tyred.org.uk/decoder)
- *Foreign transport:* Check all companies used for transfers and excursions conform to all relevant local, national and international standards. Ask for evidence. The minimum standard is that they hold an Operators Licence, Fleet Insurance and Public Liability Insurance.
- *Public Transport:* the appropriate authorities of individual Countries determine the regulations concerning public transport so there is little to be done in this area. If public transport is to be used ensure regard is given to the safety of Educational Visit Group Members using it; especially when boarding and alighting transport in countries that drive on the right.

- Staff training

Ask for details and evidence that the contractor's staff are suitably trained, qualified and competent: -

- For their role in the visit including any activity they are required to supervise or manage.
- For the use of any equipment they are required to use.
- To respond quickly and efficiently in the event of an emergency.
- In first aid if required.

- Emergency procedures

Ask for details and evidence from the contractor that he has: -

- Adequate 24-hour emergency plans and procedures in place and that they are compatible with yours.
- Suitable contingency plans.
- Adequate first aid provision and arrangements.
- Suitable accident/incident reporting procedures.
- Suitable means of communication; mobile phones etc. and can provide you with relevant contact numbers.

- Risk assessments

Ask for evidence from the contractor that: -

- There is a robust process to ensure that risk assessments are carried out.
- Suitable risk assessments have been carried out for all parts of the visit under his control and that they are reviewed if being used as a generic assessment for future visits and communicated to relevant staff.
- There are adequate method statements and safe working procedures based on the risk assessments, for activities under his control.

- Other issues

- Check that all products and services comply where applicable with current local, national and/or international standards.
- Check that any required competencies can be independently verified. Is the contractor a member of a professional body etc?
- Check that the provider abides by stipulated staffing ratios and all staff are checked for relevant criminal history.
- Check that the Activity Centre clearly specifies when its own staff will be responsible for pupil supervision and when responsibility lies with the Group Leader.
- Check if preliminary visits are welcomed or required.
- Check if the Centre can accommodate children/young people or staff with special educational needs, disabilities or individual dietary requirements.

- Check the activities and if they are appropriate for the age and abilities of the group members.
  - Check with other schools that have previously visited the same venue or have used the provider for their experiences. The LA will provide a list of activities and approved providers.
- Sub-Contractors
- Check if the contractor employs a sub-contractor; for example in the case of a Tour Operator using an independent coach company. Ask for evidence from the contractor of any systems put in place to vet and monitor the sub-contractor's safety performance

## 16.0 VISITS ABROAD

There are several issues to consider aside those discussed in earlier sections of this guidance when organising an educational visit or activity abroad. Please note the guidance below is not exhaustive.

### 16.1 USING A TOUR OPERATOR

Before using a tour operator/travel agent Group Leaders should:-

- Ensure the tour operator/travel agent is reputable, see guidance in Section 11.
- Ensure the tour operator/travel agent used is a member of ABTA and/or ATOL and that the whole package being supplied is covered by an ABTA or ATOL. These provide security against the licence holder going out of business.

### 16.2 PREPARING CHILDREN/YOUNG PEOPLE FOR VISITS ABROAD

The following factors should be considered when preparing children/young people and other group members for visits abroad: -

- Language – group members should be provided with some information regards the local language, particularly common phrases.
- Local culture of the area or country to be visited – group members should be informed of the impact of particular body language, rules, regulations of behaviour, dress codes, local customs, attitudes to gender etc.
- Use of drugs or alcohol – group members should be informed of educational visit rules and codes of conduct as well as local rules, regulations and customs of the country to be visited. It is expected that children/young people on educational visits will not be permitted to drink alcoholic drinks, or take drugs even if legal in the country being visited.
- Food & drink - when visiting certain countries group members should be warned of the dangers of drinking tap water, or ice made from it. Care may need to be taken with the preparation and consumption of raw vegetables, salads and unpeeled fruit, raw shell fish and under-cooked meats or fish. Participants should ensure that they have informed the group leader of any specific dietary needs.
- Personal security – group members should be informed of secure ways to carry money and valuables e.g. use of money belts, zip armlets. Advice should be given regarding the use of travellers cheques and problems associated with them e.g. they not always accepted and fees may be charged to cash them.
- Communication – group members should be informed of how to use phones when abroad including any area codes, money, phone cards/tokens etc. required, restrictions of the mobile phone network and the use of a BT connect Card to allow calls to be charged to the home number.
- Emergencies – group members should know what to do in the case of an emergency.

### 16.3 VACCINATIONS

The Group Leader should enquire whether any vaccination is necessary and ensure that all group members have or will receive vaccinations in good time. Proof of vaccination may be required by some countries. For advice on necessary vaccinations visit the NHS website below which gives details of steps to take prior to any visit abroad, reference NHS advice document, "Healthcare abroad) <http://www.nhs.uk/nhsengland/Healthcareabroad/pages/Healthcareabroad.aspx>

A second source to travel vaccination information can be found in the WHO document "International health and Travel, 2011 addition."

## 16.4 LANGUAGE ABILITIES

One of the adults within the visiting group should be able to speak and read the language of the destination country and if possible, any countries travelled through on the journey. If not it is strongly recommended that the Group Leader or Supervisor learns enough of the language to hold a basic conversation and knows what to say in the case of an emergency. It is also advisable that the children/young group members have a basic knowledge of the language before the visit. Cue cards could be produced in advance to be used in emergencies.

## 16.5 VISAS/PASSPORTS

The Group Leader or Educational Visits Co-ordinator should personally check that all the Group Members and Supervisors have valid passports that are within an acceptable expiry date and visas where appropriate, in the early stages of planning the visit. Some countries have an immigration requirement for a passport to remain valid for a minimum period beyond the date of entry to the country. For example, they may not accept a passport as being valid if it is due to expire within 2 months of entry. This is a requirement of the country concerned, not the Passport Office. Any questions should be addressed to their Consulate or Embassy. Your travel agent will also be able to give you advice on this matter. A group passport may suffice in certain circumstances.

Although the United Kingdom is part of the European Union, there is still a requirement to carry a full 10-year British passport every time you travel to a European destination. This includes day trips and travel by Eurostar. Many countries have now abandoned routine passport checks at their land borders, but they still expect visitors to be able to produce a valid form of identification. In the case of UK travelers this is the British passport. Remember, your passport will be checked at immigration control on your return to the UK.

A Collective Passport is issued in lieu of individual standard passports to approved parties of students, scouts, guides and other recognised youth organisations, under 18 years of age, who are British Nationals and travelling abroad as a group. They must be accompanied by an adult leader (over 21 years of age), and if possible, a deputy leader, each holding an individual British passport. A minimum of 5 and a maximum of 50 persons may be included on a collective passport. For advice on how to apply for a collective passport visit <https://www.gov.uk/collective-group-passports/how-to-apply>

A Collective Passport can only be used for one trip, inclusive of the arranged set-off and return dates; these dates should be included on the passport application.

## 16.6 NATIONALITY

If the Group includes a child/young person whose national or immigration status or entitlement is in doubt, it is advisable to make early enquiries of the Home Office's Immigration and Nationality Directorate. Children/young people other than EU nationals may require a separate passport and may need to use separate passport control channels to the rest of the group.

## 16.7 CARE ORDERS AND WARDS OF COURT

If a child is subject to a care order, foster carers will need to ensure that permission is granted by the "Corporate Parenting" business unit via the child's social worker. If a child is a ward of court, the Head Teacher should seek advice from the court in relation to educational visits and activities abroad, well in advance and on an individual basis.

## 16.8 EMERGENCY MEDICAL FACILITIES

Some emergency medical facilities are available through reciprocal healthcare arrangements in European Union Countries, Iceland, Liechtenstein, Norway and Switzerland to EU Nationals. "The group leader must ensure that all members of the group know what action to take if there is a problem, see Emergency Procedures guidance section 15. It is necessary for all participants to have the UK Global Health Insurance Card, 'GHIC', issued by the department of health. The GHIC lets you get necessary state healthcare in the European Economic Area (EEA) and some other countries, on the same basis as a resident of that country. This may be free or it may require a payment equivalent to that which a local resident would pay.

The UK GHIC is not a replacement for travel insurance. You can apply for a UK GHIC if you're a resident in the UK. And can be applied for online <https://overseas-healthcare.nhsbsa.nhs.uk/get-healthcare-cover-travelling-abroad/start>

## 16.9 TRAVEL BY AIR

Taking a group on an aircraft requires careful planning and preparation. The airline/travel agent may be able to advise on requirements. If the group includes any members with disabilities, it is advisable to check with the airline what arrangements it has, such as wheelchair or lifting provision. The Group Leader should resist any attempt by the airline to split up the group between different aircraft. Please note some airlines may charge for the provision of wheelchairs or oxygen.

## 16.10 TRAVEL BY MINIBUS

The regulations that govern journeys outside the UK depend upon the country or countries being visited including those which are passed through. Extra care must be taken when driving in countries that drive on the right; as passenger doors on UK minibuses will not open on the kerb side. Drivers taking groups abroad should be familiar with driving a minibus in the country being visited and those countries en-route including the relevant domestic driving laws.

The Driver / operator should consult the vehicles insurers regarding additional insurance cover for the journey and the countries to be visited. Regulations regarding the carrying of certain emergency equipment, e.g. 'a warning triangle' or high visibility jacket also vary. The Driver should consult one of the main UK motoring organisations for advice. Preferential consideration should be given to those drivers who have had previous experience of driving abroad.

Driving Abroad - Drivers Must: -

1. Contact their insurer for permission and obtain a green card if necessary.
2. Carry a letter of permission from the registered keeper of the vehicle, e.g. Liverpool City Council Fleet Manager or Contract hire supplier etc. (whoever owns it).
3. Ensure there is adequate breakdown / puncture cover for the continent and carry contact details.
4. Identify what other documents or equipment (red triangle, etc.) are required for each country they visit.

Documentation for International Journeys

Operators of minibuses and drivers must ensure all documentation for journeys abroad is carried. The requirements may vary according to the country or countries being visited so further advice should be obtained. Some or all of the documents listed below may be required: -

- Full driving licence with the appropriate entitlement.
- International Driving Permit or translation of driver's licence (for some countries).
- If any payment is made by or on behalf of the passengers – a full PSV driving licence.
- Vehicle Registration Document.
- Tachograph charts.
- Letter of authority to drive the minibus.
- Waybill and / or Own Account Certificate.
- Green Card (International Motor Insurance Certificate).

1. Driving licence Requirements

Driving licence requirements and laws relating to drivers' hours vary in countries outside of the EU. Drivers cannot drive a minibus abroad using a private car driving licence regardless of the date the licence was issued; a Passenger Service Vehicle Licence is required. The services of a professional driver should be sought when using a minibus abroad.

## 2. International Drivers Permit

An International Drivers Permit (IDP) is an internationally recognised, low cost, document which, when accompanied by your own UK licence will allow you to drive a private motor vehicle in a foreign country. An IDP is proof that you hold a valid driving license in your own country. It is not always necessary to have one, since many countries recognize each other's licenses, but possessing an IDP has many advantages.

It is intended to overcome the difficulties drivers may have while traveling in other countries that may have widely varying license requirements. It is printed in 10 languages - the five United Nations official languages (English, French, Spanish, Russian and Chinese) plus German Arabic, Italian, the Scandinavian languages, and Portuguese. It may also be a useful form of picture ID in the case of a lost or stolen passport.

## 3. Minibus Permits

Minibus Permits are not valid abroad.

## 4. Vehicle registration document

The vehicle registration document must be carried with you while you are abroad. Photocopies are not acceptable. If your minibus is hired, then the AA or RAC can issue you with a 'Vehicle on Hire' certificate.

## 5. Tachograph

A tachograph must be fitted and used for international journeys (except in Eire). Drivers must be trained in the use of the tachograph as misuse may lead to prosecution or spot fines. Driver's hours regulations must be followed from the start of the journey in the UK.

## 6. Letter of authority

If your name is not on the vehicle registration document, then you will need a letter from the owner of the vehicle authorizing you to drive it abroad. For example, for a school with a minibus registered in the name of Liverpool County Council, a letter on school headed paper, signed by the Head teacher, should be sufficient.

## 7. Waybill

The Waybill provides details of the vehicle, driver, routes, times and a list of passengers, for trips lasting less than 90 days. This covers journeys through all EU Member Countries. Requirements for a journey through any other country should be checked with that country's embassy. Addresses of embassies can be obtained from one of the national motoring organisations.

The top copy of the Waybill must be carried by the driver at all times, and should be stamped at the frontier crossings. The group organiser keeps the duplicate. In addition to the Waybill, a set of translations must also be carried called a 'Model Control Document'. Both of these are available from the Confederation of Public Transport UK.

## 8. Own Account Certificate

The main paperwork needed for an international journey by a voluntary group is an Own Account Certificate. This is available for journeys within the European Union (EU) by a non-profit making body which: -

- Does not have transport as its main activity
- Is transporting its own members in a vehicle which it owns.

Own Account Certificates are valid for five years and are issued free of charge from the International Road Freight Office. If any of the above conditions are not met (e.g. the vehicle is borrowed or hired, or the journey is outside of the EU) then a Waybill will be required.

#### 9. Green Card (International Motor Insurance Certificate).

Although vehicle insurance policies issued in the UK and Ireland automatically provide the minimum legal cover required within the EU and some other non EU European countries, it is recommended that an International Motor Insurance Certificate (commonly known as a Green Card) is obtained from the minibus operator's insurance company. It is advisable to have at least two drivers named on the Green Card in case of illness to the main driver.

If a trip is being planned to, or through Spain, a Bail Bond is also recommended and this can be obtained from the minibus operator's insurance company. In Spain, the guilty party in an accident can be imprisoned unless there is a deposit paid to cover liability or a fine. A Bail Bond will ensure that a driver is released pending a court case.



## 17.0 FINANCING

Any financial arrangements between the Local Authority and schools / youth facilities may vary over time and for different services. It is therefore advisable to contact the LA or Liverpool Targeted Youth Service if there is any doubt regarding educational visit or activity funding arrangements.

### 17.1 CHARGING FOR SCHOOL ACTIVITIES

Sections 449-462 of the Education Act 1996 set out the law on charging for school activities in schools maintained by local authorities in England.

#### Educational Visits

Schools cannot charge for:

- Education provided on any visit that takes place during school hours
- Education provided on any visit that takes place outside of school hours if it is part of the national curriculum, or part of a syllabus for a prescribed public examination that the child/young person is being prepared for at the school, or part of religious education
- For the cost of supply teachers to cover for those teachers who are absent from school accompanying children/young people on a residential visit.

Schools can charge for:

- Board and lodging and the charge must not exceed the actual cost.

#### Transport

Schools cannot charge for:

- transporting registered children/young people to or from the school premises, where the local authority has a statutory obligation to provide transport;
- transporting registered children/young people to other premises where the governing body or local authority has arranged for pupils to be educated;
- transport that enables a child/young person to meet an examination requirement when he has been prepared for that examination at the school;
- transport provided in connection with an educational visit.

#### Voluntary Contributions

Nothing in legislation prevents a school governing body or local authority from asking for voluntary contributions for the benefit of the school or any school activities. However, if the activity cannot be funded without voluntary contributions, the governing body or head teacher should make this clear to the parents at the outset. The governing body or head teacher must also make it clear to parents that there is no obligation to make any contribution.

It is important to note that no child/young person should be excluded from an activity simply because his or her parents are unwilling or unable to pay. If insufficient voluntary contributions are raised to fund the visit, then it must be cancelled. Schools must make sure that they make this clear to parents. If a parent is unwilling or unable to pay, their child must still be given an equal chance to go on the visit.

When making requests for voluntary contributions to the school funds, parents must not be made to feel pressurised into paying as it is voluntary and not compulsory. Schools should avoid sending colour coded letters to

parents as a reminder to make payments into the school or maintenance funds. Schools should also ensure that direct debit or standing order mandates are not sent to parents when requesting for contributions

## **17.2 CHARGING FOR ADULTS**

The exact supervision ratio should be decided by the generic guidance within this document, advice from the LA, as well as a result of risk controls identified in the visit or activity risk assessment. If adults / Group Supervisors are to be taken beyond these requirements, they should not be directly or indirectly subsidised by the parents of the educational visit group. This does not preclude a Group Supervisor / Group Leader job-share being arranged so that part of the payment is agreed on a voluntary basis. Any free places being offered by a commercial company subsidising or funding a visit or activity should be taken by qualified / experienced members of staff who are directly contributing to the supervision ratios.

## **17.3 SURPLUS FUNDS**

If following an educational visit or activity there is a surplus of funds; the money should be returned as an equal share to each contributor, pro-rata for those that have made part payments, unless there is a clear declaration and written agreement (consent) on what the money will be used for. With written consent surplus monies would normally be placed in the school visit fund or used to support other ventures.

## 18.0 EMERGENCY PROCEDURE

### 18.1 EMERGENCY PLANNING

A 'HOME-BASE & VISIT EMERGENCY PACK' system as a suitable tool for ensuring that each educational visit or activity has been fully prepared for.

This system is considered essential practice and has therefore been recommended by the Local Authority for use by all schools and establishments involved with organising or providing educational visits.

#### The Home-base Emergency Pack

This emergency pack should remain with the Emergency School / Home Contact and be kept conveniently by their telephone along with a notepad and pen.

The following information should be contained within the pack: -

- The responsibilities of the Emergency School / Home Contact (see section 4.8).
- The procedures to be followed by the Emergency School / Home Contact (see section 4.8).
- Information regarding individual visit insurance arrangements (see section 7).
- Details of any alternative (bad weather) programme.

Any other necessary relevant information such as the details of the planned travel route and any arranged stop-off points and a pre-planned Phone Call & General Contact Record Sheet.

Copies of the following records should be contained within the home base emergency pack: -

- The Application for the approval of educational visits by the Head Teacher, Governing Body or LA (suitably completed). (Print off of EVOLVE submission form)
- Liverpool City Council's Risk assessment and control measure records for the visit and activities. (Form 2)
- Parental consent forms containing emergency contact information for each Group Member. An emergency contact should be provided for adult Group Members. (Form 3)
- Summary Contact Checklist of pupils/young people and any staff or adult volunteers attending the visit. (Form 4)
- A supply of Liverpool City Council's Accident/Incident report record forms.

#### The Visit Emergency Pack

This pack should be taken with the GROUP LEADER and DEPUTY GROUP LEADER and be readily accessible during the visit along with a notepad and pen.

The following information should be contained within the pack: -

- The responsibilities of the Group Leader (see section 4.5).
- The procedures to be followed by the Group Leader (see sections 4.5, 14 and 15).

- Emergency procedures (Group leaders should follow local authority guidance as described in the School Emergency Plan SEMP, group leaders should complete SEMP document entitled "Incident Management Flowchart for Group Leaders" and carry at all times when on a visit.)
- Information regarding individual visit insurance arrangements (see section 7).
- Details of educational visit programme.
- Details of any alternative (bad weather) programme.
- Equipment checklist.
- Any other necessary relevant information such as the details of the planned travel route, any arranged stop-off points and a pre-planned Phone Call & General Contact Record Sheet including information on specific needs such as medication.

Copies of the following records should be contained within the visit emergency pack: -

- The Application For The Approval of Educational Visits By the Head Teacher, Governing Body or LA (suitably completed). (Print off of EVOLVE submission form)
- Liverpool City Council's Risk assessment and control measure records for the visit and activities. (Form 2)
- Parental consent forms containing emergency contact information for each group member emergency contact should be provided for adult group members. (Form 3)
- Summary Contact Checklist of pupils/young people and any staff or adult volunteers attending the visit. (Form 4)
- A supply of Liverpool City Council's Accident / Incident report record forms.
- Checklist of pupils / adults on the visit (containing no confidential information), for use when undertaking headcounts.

## **18.2 FIRST AID ARRANGEMENTS**

Adequate and appropriate first aid provision must be made available for all out-of-school activities. First aid should form part of the educational visit risk assessment. Before undertaking any off-site activities the Head Teacher and Group Leader should assess the level of first aid that may be required and agree the appointment of a person to be responsible for first aid arrangements during the visit. For local low risk activities, a person with a knowledge of first aid and access to a first aid kit may be sufficient. For activities in remote environments such as during Duke of Edinburgh award expedition or training one supervisor should hold a first aid qualification specific to the outdoors.

The Group Leader and other Group Supervisors/Members should know names and locations of First Aiders during the visit. This information should be kept in the in the Emergency Pack.

### Numbers & Competencies of First Aiders

The Group Leader should make an assessment of first-aid needs appropriate to the circumstances of each educational visit. The aim of first aid is to reduce the effects of injury or illness suffered during the educational visit, either caused by the activities or by some factor outside the Group Leaders control. First-aid provision must be 'adequate and appropriate in the circumstances'. This means that sufficient first-aid personnel and facilities should be available to give immediate assistance to casualties with both common injuries or illness and those likely to arise from hazards associated with specific activities planned during the educational visit as well as to summon an ambulance or other professional help.

The Group Leader should decide the number, and level of qualification of First Aiders that will be adequate and appropriate. The number of people on the educational visit should not be regarded as the only factor in deciding how many first aiders would be appropriate. Considerations to be taken account of within the educational visit risk assessment include the nature of the activity, the kind of likely injuries due to the activities and the distance to the nearest hospital. The person/people chosen to be the First Aider(s) on an educational visit should be selected on the basis of being competent, suitably qualified, and able to act in an emergency and having a degree of organisational ability.

Group Leaders may need to justify on what grounds the level of first-aid provision has been set. Although there is no requirement for the assessment of first-aid needs to be formal or written, it may be useful to record the results.

### Appointed Persons

Where the risk assessment identifies a comparatively low-risk to health and safety and identifies that a first aider is not necessary the Group Leader must still ensure that there is an Appointed Person on every Educational Visit. It is the duty of the Appointed Person to take charge of the first-aid arrangements, including looking after the equipment and facilities and calling the emergency services when required. Arrangements should be made for an appointed person to be available to undertake these duties at all times during the educational visit.

### First Aid Boxes

Portable first aid boxes for use on educational visits should be readily accessible at time of need, e.g. kept on board the coach during the journey. All minibuses are required by law to carry two first aid boxes. The educational visit supervisors should hold a suitably stocked number of portable first aid boxes children/young people should not have free access to first aid boxes.

### Medical Room

If there is a designated first aid room at the venue children/young people must not be sent there and left alone. The Group Leader should be informed if a group member is sent to the first aid room or requires first aid.

### Transportation

In general, if a group member requires hospital treatment for injury or illness, an ambulance should be called by dialling 999, dialling 9 - 999 if calling through a switchboard within the UK or by using the appropriate emergency number if abroad. At the Group Leader's discretion, an injured or sick adult or child may be taken home by taxi or car, provided they are accompanied by a responsible person, other than the driver, who is known to the child.

If private transport is to be used the Head Teacher / acting Head Teacher Targeted Youth Service Area Manager must authorise a nominated member of staff as the driver; ensuring that the driver is adequately insured (Business Use Insurance Cover) to drive the vehicle. These checks should be carried out and documented as part of the educational visit emergency plan.

### Administration of Medication during an Educational Visit

If pupils need to take medication during an educational visit, parents must inform the Head Teacher of this requirement either in writing or in person. Parental permission and medicine administration instruction should be provided to the Group Leader. Medication should be collected in its original container, and details of dosage should agree with instruction given by parents. Medication must be kept in a securely controlled medical store or held where appropriate by a suitable person until it is required. A written record should be kept of times and dosages of medications administered, the record should be signed and witnessed.

### Emergency Details

If a participant is admitted to hospital, the Group Leader should inform the Emergency School / Home-base Contact and refer to the Emergency Contact List which includes details of contact telephone numbers to inform parents, these details should be kept by the Group Leader.

### **18.3** IN THE EVENT OF AN ACCIDENT OR INCIDENT

The information within this Section is intended to supplement that of the Education Authority's Schools' Health and Safety Policy 2002 and Liverpool Authority's Schools Emergency Planning Guidance, The Schools Emergency Plan (SEMP) and for group leaders the synopsis document "Incident Management Flow Chart for Group Leaders".

All accidents must be recorded and reported to the school or Targeted Youth Service. The more serious accidents are required to be reported to the Council's Occupational Safety and Health Unit via the Council's electronic accident form available on the Council's intranet or EVOLVE. Some accidents are required to be reported to the Health and Safety Executive, see Section 16 Accident Reporting Procedure.

#### Emergency first aid procedures

Despite good planning and organisation there may be accidents and emergency situations that require an on-the-spot response by those leading the educational visit. The following outline guidance is intended for Group Leaders; to assist them in being prepared for such emergencies. The LA has put in place procedures to support all group leaders, teachers and youth workers during an emergency situation. The procedures and guidance are documented in Liverpool City Council's Schools Emergency Planning Guidance and associated documents. These procedures and the accident reporting procedures noted in this section should be considered alongside any visit specific emergency arrangements.

The Group Leader will remain in overall charge of those on the educational visit, however when summoned to an accident, the first aider will, so far as is practicable take charge of first aid treatment and render such first aid as is advised or authorised for certificated first aiders. If required and taking into account the advice of the first aider, the Group Leader should call the emergency services or ensure that the emergency services have been summoned.

On no account should injured persons be left alone or allowed to go to hospital by themselves. Should an ambulance be required, the first aider is to stay with the injured person until it arrives and provide any required details to the ambulance staff. Where possible the first aider should accompany the injured or sick person to the hospital, to the doctor or to their home.

A record should be made of every occasion when any employee, participant or other person receives first aid treatment whilst on an educational visit as part of a school-related activity.

#### Group Supervision

The Group Leader or deputy must:-

- Establish the nature and extent of the emergency as quickly as possible. Advise all other staff and/or supervisors of the emergency and ensure where possible that the emergency procedure is followed.
- Ensure all group members are accounted for.
- Immediately establish the names of any injured people and if possible assess the extent of their injuries. Get immediate medical attention for them. On no account should injured persons be left alone.
- Ensure that if hospital treatment is required a teacher or adult known to the injured / sick person(s) accompanies them on the journey to hospital; this is in addition to the driver of the ambulance or vehicle. A communication should be made from the hospital to the Emergency School/Home-base Contact to advise them of the situation.
- Ensure the rest of the group are adequately supervised, kept together at all times, have understood what has happened and the implications for the rest of the visit programme.

- Notify the police or other emergency services if necessary.
- Notify the British Embassy/Consulate, if necessary, if an emergency occurs abroad.

#### Communication

The Group Leader or deputy must:-

- Make immediate contact with the designated Emergency School / Home-base Contact and provide details of the emergency. Unnecessary group member access to telephones, including mobile phones, should be restricted as far as possible until emergency contact has been made. The Emergency Contact telephone number must be available at all times during the visit in the Emergency Pack.
- Prepare a report as soon as possible following an accident, incident or near miss noting names, addresses and telephone numbers of any witnesses.

The Emergency School / Home-base Contact must: -

- Record all telephone communications and incident details clearly and accurately on record sheets.
- Arrange a call-back time for an update from the Group Leader.
- Make sure relevant information is to hand before telephoning anybody regarding the incident.
- Inform LCC or SIL, whichever is appropriate about serious accidents or incidents.
- Decide with the Group Leader which, if any, parents need to be informed about the incident. Record details of contacts made with parents on the emergency contact list. If contacting parents be clear, brief and reassuring.
- Inform parents of the local hospital telephone number if it is necessary.
- Not give out the venue telephone number or your contact telephone number to parents or others who do not require them. These lines are to be kept free from casual use.
- Not stay on-line too long with any individual; as others may be trying to call you; instead arrange a time to call back with more news.
- Not give out the venue telephone number or your contact telephone number to parents or others that do not require them. These lines are to be kept free from casual use.
- Report Accidents and incidents to relevant Head Teacher or Targeted Youth Service Area Manager. In addition a formal report should be provided to the City Council's Health and Safety Unit using the electronic form in line with the City Council's accident reporting process (see Section 15) as soon as possible but at least within five work days.
- Provide any accident, incident reports or other relevant record sheets to the Group Leader on their return from the visit.
- Contact the LA press office 0151 233 3040 and give all available information relating to the incident.

The names of any injured group members should not be released to the media. Caution is required when making any statement as legal proceedings may follow an accident or incident.

In the event of an emergency where support is required from the LA, telephone LCC emergency number 0151 236 2635 (taking into account the dialling code when out of the local area or abroad) who will connect you with the Senior Response Officers. On contacting this service or any other pre-arranged Emergency Contact clearly state that it is an "educational visit emergency", the number of the telephone you are talking from, the name of your school or

facility, your location and nature of the emergency. Other details you should relay include the time and date of the incident, names of casualties, details of injuries, the names of any other parties involved and the action taken so far and yet to be taken.

#### Near Miss Incidents

A near miss is an occurrence that had the potential, but did not lead to an accident (there is no injury, ill health or damage to property). All near misses should be reported within 24 hours to the Health and safety Unit via the council's accident e-form available on the intranet and to the School Improvement Physical and Nutritional Health and Well Being Officer. Investigation of near misses is as important as the investigation of accidents as they may identify trends or prevent an accident occurring. Following a near miss, alternative activities may need to be provided; such a change should form part of the emergency plan. Any revised arrangements should be communicated to all those on the educational visit and where necessary to the school/home- base contact and to the LA.

### **18.4** IN THE EVENT OF AN EARLY OR LATE RETURN FROM A VISIT

The Group Leader must contact the Emergency School / Home-base Contact with the reason for the change of plan and the revised expected return time. The Emergency School / Home-base Contact must make a note of any change on an incident record and inform parents with the latest expected return time, if appropriate.

### **18.5** IN THE EVENT OF NOT RECEIVING A PRE-PLANNED CALL

If the Group Leader has not called at the agreed time, the Emergency School / Home-base Contact should wait a reasonable time (e.g. one hour) before trying to contact them as they may simply be running behind schedule. If the Group Leader or Deputy Group Leader cannot be contacted after this time, contact the intended venue as they may be able to offer an explanation, for instance delays due to heavy local traffic.

Contact the travel company or tour operator, as they may assist you in locating and contacting the visit coach or minibus. They may have an explanation for any delay, for example a tyre change may have been required. An alternative may be to contact any pre-arranged stop-off-points; these may be able to confirm if the party has already arrived or if they have continued on their journey.

If you are not satisfied with the explanations from any of the above contacts check the emergency procedures (see section 14).

## 19.0 ACCIDENT REPORTING PROCEDURE

### **19.1** COUNCIL REPORTING PROCEDURES

Schools and Targeted Youth Service groups are required to report accidents, near-miss events and violent incidents to the Health and Safety Unit on the accident e-form within 24 hours. See guidance note GN24 Accident/Incident reporting and Investigation on the intranet sites for further information. Minor incidents should be recorded in the school/facility Accident Book.

Group leaders should ensure that suitable incident report forms are included in the visit emergency pack during an educational visit on which to note the details of accidents/incidents.

The Group Leader must ensure that there is a robust procedure in place during the educational visit to ensure that all the relevant details of all accidents are appropriately gathered and recorded

Minor injuries to non-employees (e.g. pupils volunteers, members of the public injured as a result of the groups activities) i.e. cuts, bruises or grazes needing no more than on-the-spot first-aid during an educational visit - enter



accident details in the Visit Emergency Pack. Details can be transferred to the School/Facility Accident Book on return form the visit. Notify parents of pupils on return.

Any accident resulting in:

- Any injury (regardless of how minor) to a member of City Council staff (e.g. teachers, youth workers etc.)

OR

- Any significant injury to non-employees (e.g. pupils volunteers, members of the public injured as a result of the groups activities) that results in the injured party requiring expert medical attention (e.g. more than just first aid; going to a walk in centre, hospital or seeing their GP)

...is reported to the City Council's Health and Safety Unit within 24 hours via the accident e-form. The link to this form is available the Health, Safety and Wellbeing web page of the Council's Intranet.

All accidents should have proportionate investigations undertaken. See guidance note GN12 Accident/Incident Reporting and Investigation for advice and supporting documentation.

## **19.2** Health and Safety Executive Reporting procedures

In addition to the above requirements to report to the City Council 'The Reporting of Injuries Diseases and Dangerous Occurrence Regulations 1995' (RIDDOR), requires that, any accident at work or in connection with a work activity to an employee or non-employee where there is a fatality, major injury, prescribed disease or dangerous occurrence or an accident which results in an employee taking more than three days off work, 4 days or more including non-working days e.g. weekends, or not being able to undertake their usual role e.g. being put on light duties for more than 3 days, as a direct result of that accident, must be reported to the Health and Safety Executive.

In cases of death or major injuries, you must notify the enforcing authority without delay by reporting online or you can telephone 0345 300 9923. All other reporting must be done online.

In addition any accident must be reported to the HSE that results in an injury requiring a non-employee to go straight from the scene of the accident to hospital OR where an employee is admitted and stays in hospital for more than 24 hours.

More information on RIDDOR reporting is available in Guidance Note GN12 Accident Reporting and Investigation or on the HSE website <http://www.hse.gov.uk/riddor/>

You must send copies of accident investigations and the RIDDOR reference number to the Health and Safety Unit.

A copy of any completed RIDDOR report forms must be emailed to the Health and Safety Unit inbox.

## APPENDICIES

(All Appendices are available on EVOLVE as attachments)

### Appendix one - Educational Visits Checklist

| PLANNING FOR THE VISIT |  |  |
|------------------------|--|--|
| Purpose of the event   | <ul style="list-style-type: none"> <li>Set clear objective for the visit</li> </ul>  |  |
| The Group              | <ul style="list-style-type: none"> <li>Group Composition considerations</li> </ul>   |  |
|                        | <ul style="list-style-type: none"> <li>Age range of group members</li> <li>Gender mix of group members</li> <li>Previous experience of group members</li> <li>Capability of group members</li> <li>Number of group members</li> <li>Fitness of group members to do the activity</li> <li>Suitability of social/cultural background</li> </ul>  |  |
|                        | <ul style="list-style-type: none"> <li>Group Selection considerations:                             <ul style="list-style-type: none"> <li>Group members known to the leader</li> <li>Members behaviour</li> <li>Member's interest in the visit topic</li> <li>Member's previous experience</li> <li>Member's maturity</li> <li>Gender balance</li> </ul> </li> </ul>   |  |
|                        | <ul style="list-style-type: none"> <li>Catering for individual group member special needs Considerations:                             <ul style="list-style-type: none"> <li>Mobility</li> <li>Behaviour</li> <li>Psychological</li> <li>Medical</li> </ul> </li> </ul>  |  |
| Staffing               | <ul style="list-style-type: none"> <li>Staffing Considerations:</li> </ul>   |  |
|                        | <ul style="list-style-type: none"> <li>Ratio of the number of staff to the number in the group</li> <li>Ratio of staff to group member needs</li> <li>Group member activity requirements</li> <li>Local &amp; National; requirements</li> <li>Criminal clearance issues</li> </ul>   |  |
|                        | <ul style="list-style-type: none"> <li>Staff selection considerations:                             <ul style="list-style-type: none"> <li>Staff experience of the activity, location &amp; group needs</li> <li>Personal qualities of staff, relationships, management &amp; maturity</li> <li>Qualifications for the activity, first aid, driving etc.</li> <li>Staff fitness for the activity</li> </ul> </li> </ul> |  |
| Safety Guidelines      | <ul style="list-style-type: none"> <li>Local sources to check:</li> </ul>  |  |
|                        | <ul style="list-style-type: none"> <li>Institutes that may produce guidance on the visit activities</li> <li>Local Education Authority</li> </ul>  |  |
|                        | <ul style="list-style-type: none"> <li>National sources to check:</li> </ul>   |  |
|                        | <ul style="list-style-type: none"> <li>Government guidelines and regulations</li> <li>National Governing Bodies</li> <li>Professional &amp; voluntary associations</li> </ul>  |  |
| Risk Assessment        | <ul style="list-style-type: none"> <li>The process should include the following:</li> </ul>  |  |
|                        | <ul style="list-style-type: none"> <li>Review previous risk assessments</li> <li>Identify the hazards</li> <li>Identify those who may be at risk from the hazards</li> </ul>   |  |

|  |   |  |
|--|---|--|
|  | ➤ Evaluate the risks                            |  |
|  | ➤ Produce hazard control measures               |  |
|  | ➤ Record the process                            |  |
|  | ➤ Review the assessment process as required     |  |
|  | • Consider travel arrangements:                 |  |
|  | ➤ Assembly points                               |  |
|  | ➤ Mode of transport                             |  |
|  | ➤ Breaks in the journey                         |  |
|  | ➤ Levels of supervision                         |  |
|  | ➤ Group dispersal                               |  |
|  | • Consider the visit venue:                     |  |
|  | ➤ Residential base                              |  |
|  | ➤ Sites of intended activities                  |  |
|  | ➤ Site/venue security                           |  |
|  | ➤ Fire precaution arrangements                  |  |
|  | • Consider the visit programme of events:       |  |
|  | ➤ Matching programme to group capabilities      |  |
|  | ➤ Check qualification of activity staff         |  |
|  | ➤ Group equipment & resources                   |  |
|  | ➤ Personal clothing and equipment               |  |
|  | ➤ First aid requirements                        |  |
|  | • Consider the environmental conditions:        |  |
|  | ➤ Weather conditions                            |  |
|  | ➤ Seasonal variations                           |  |
|  | • Consider communications:                      |  |
|  | ➤ Within the group                              |  |
|  | ➤ With the venue staff                          |  |
|  | ➤ With the Home-base                            |  |
|  | ➤ With Emergency services                       |  |
|  | • Consider the response to the risk assessment: |  |
|  | ➤ Are further control necessary                 |  |
|  | ➤ Decision to proceed with visit or abort       |  |

| VISIT ADMINISTRATION |   |  |
|----------------------|---|--|
| Programme            | <ul style="list-style-type: none"> <li>• Consider the following:</li> </ul>   |  |
|                      | <ul style="list-style-type: none"> <li>➤ Schedule the event</li> </ul>  |  |
|                      | <ul style="list-style-type: none"> <li>➤ Transport arrangements</li> </ul>  |  |
|                      | <ul style="list-style-type: none"> <li>➤ Staffing decisions- ratios, roles &amp; responsibilities of leader &amp; assistants</li> </ul> |  |
|                      | <ul style="list-style-type: none"> <li>➤ Codes of conduct for the group and care of the environment</li> </ul>                          |  |
|                      | <ul style="list-style-type: none"> <li>➤ Check of personal clothing and equipment</li> </ul>  |  |
| Certification        | <ul style="list-style-type: none"> <li>• Consider the following:</li> </ul>   |  |
|                      | <ul style="list-style-type: none"> <li>➤ Passports</li> </ul>   |  |
|                      | <ul style="list-style-type: none"> <li>➤ AALA certification</li> </ul>  |  |
|                      | <ul style="list-style-type: none"> <li>➤ Qualifications</li> </ul>  |  |
|                      | <ul style="list-style-type: none"> <li>➤ Driving requirements</li> </ul>  |  |
| Consultations        | <ul style="list-style-type: none"> <li>• Consider the following:</li> </ul>   |  |
|                      | <ul style="list-style-type: none"> <li>➤ Review the assessment process as required</li> </ul>   |  |
|                      | <ul style="list-style-type: none"> <li>➤ Information for parents</li> </ul>   |  |
|                      | <ul style="list-style-type: none"> <li>➤ Tourist information</li> </ul>   |  |
|                      | <ul style="list-style-type: none"> <li>➤ Others such as schools who have experience of the venue/locality</li> </ul>                    |  |

|         |  |  |
|---------|--|--|
| Finance | <ul style="list-style-type: none"> <li>• Consider the following:</li> </ul>  |  |
|         | <ul style="list-style-type: none"> <li>➤ Budgeting (anticipated cost &amp; income)</li> </ul>                            |  |
|         | <ul style="list-style-type: none"> <li>➤ Systems for monitoring incoming &amp; out going monies (audit trail)</li> </ul> |  |
|         | <ul style="list-style-type: none"> <li>➤ Systems for recording incoming &amp; outgoing monies</li> </ul>                 |  |
|         | <ul style="list-style-type: none"> <li>➤ Security systems</li> </ul>   |  |
|         | <ul style="list-style-type: none"> <li>➤ Plans for surplus income</li> </ul>   |  |
|         | <ul style="list-style-type: none"> <li>➤ Preparation of balance sheet on the completion of the event</li> </ul>          |  |

| MANAGING THE VISIT |   |  |
|--------------------|---|--|
| Group Management   | <ul style="list-style-type: none"> <li>• Consider the following:</li> </ul>   |  |
|                    | <ul style="list-style-type: none"> <li>➤ Brief the staff</li> </ul>   |  |
|                    | <ul style="list-style-type: none"> <li>➤ Brief the other group members</li> </ul>                                     |  |
|                    | <ul style="list-style-type: none"> <li>➤ Achievement of the event objectives</li> </ul>                               |  |
|                    | <ul style="list-style-type: none"> <li>➤ Monitoring of the group's response to the demands of the activity</li> </ul> |  |
|                    | <ul style="list-style-type: none"> <li>➤ Monitoring the group's response to the changing environment</li> </ul>       |  |
|                    | <ul style="list-style-type: none"> <li>➤ Staff deployment and group supervision</li> </ul>                            |  |

| EMERGENCY PLANNING   |   |
|----------------------|---|
| Contingency Planning | <ul style="list-style-type: none"> <li>• The following should be set up:</li> </ul>   |
|                      | <ul style="list-style-type: none"> <li>➤ Group details left at base and taken on the visit</li> </ul>   |
|                      | <ul style="list-style-type: none"> <li>➤ Two emergency contacts at base</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ System to contact the next of kin in emergencies and system cascaded to all staff</li> </ul>   |
|                      | <ul style="list-style-type: none"> <li>➤ Systems for dealing with a major incident involving other agencies</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ An alternative plan in the event of unforeseen circumstances : <ul style="list-style-type: none"> <li>✓ Transport breakdown</li> <li>✓ Delay</li> <li>✓ Illness of staff or group members</li> <li>✓ Injury &amp; the availability of first aid</li> <li>✓ Poor weather conditions</li> <li>✓ Change of activities</li> <li>✓ Next of kin unavailable during or after the event</li> </ul> </li> </ul> |
|                      |   |
| Incident Management  | <ul style="list-style-type: none"> <li>• Systems should be set up to deal with minor incidents on site for:</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ Dealing with an incident</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ Managing the whole group</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ Assessing the whole situation</li> </ul>   |
|                      | <ul style="list-style-type: none"> <li>➤ Continuing the activity or returning to base</li> </ul>  |
|                      |   |
|                      | <ul style="list-style-type: none"> <li>• Systems should be set up to deal with major incidents involving other agencies for:</li> </ul>   |
|                      | <ul style="list-style-type: none"> <li>➤ Immediate action at the scene</li> </ul>   |
|                      | <ul style="list-style-type: none"> <li>➤ Procedures governing contact with: <ul style="list-style-type: none"> <li>✓ Emergency Services</li> <li>✓ The organisation or activity centre</li> <li>✓ Immediate family of group members</li> <li>✓ Continuing the activity or returning to base</li> </ul> </li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ Dealing with the incident</li> </ul>   |
|                      | <ul style="list-style-type: none"> <li>➤ Managing the whole group post incident</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ Assessing the situation</li> </ul>   |
|                      | <ul style="list-style-type: none"> <li>➤ Continuing the activity or returning to base</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ Record essential information</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ Returning the group to base or directly home</li> </ul>  |
|                      | <ul style="list-style-type: none"> <li>➤ Post incident care of the group</li> </ul>   |

## EVALUATION OF THE VISIT

|                           |   |
|---------------------------|---|
| EVALUATION OF THE VISIT   |   |
| Why Evaluate              | <ul style="list-style-type: none"> <li>• The reasons for evaluation include:</li> </ul>   |
|                           | <ul style="list-style-type: none"> <li>➤ It is required as part of risk management</li> <li>➤ To determine if the visit aims and objectives have been achieved</li> <li>➤ To reflect on the effectiveness of the planning</li> <li>➤ To improve the organisation of future visits</li> <li>➤ To review near misses and other safety issues</li> </ul>   |
|                           |   |
| What to Evaluate          | <ul style="list-style-type: none"> <li>• The following should be considered in an evaluation:</li> </ul>  |
|                           | <ul style="list-style-type: none"> <li>➤ How well the objectives of the activity were met</li> <li>➤ The effectiveness of initial planning (staff and safety)</li> <li>➤ Legal requirements</li> <li>➤ Effectiveness of the risk assessments</li> <li>➤ Administration systems</li> <li>➤ Effectiveness of contingency plans</li> <li>➤ Group management</li> <li>➤ Incident and near misses</li> </ul> |
|                           |   |
| How to Evaluate           | <ul style="list-style-type: none"> <li>• Consider the following methods of evaluation:</li> </ul>   |
|                           | <ul style="list-style-type: none"> <li>➤ Debrief the group, staff and others involved</li> <li>➤ Reflection by the Group Leader</li> <li>➤ Reports of the visit</li> </ul>  |
|                           |   |
| When to Evaluate          | <ul style="list-style-type: none"> <li>• An evaluation should be undertaken:</li> </ul>   |
|                           | <ul style="list-style-type: none"> <li>➤ Before leaving the venue</li> <li>➤ Soon after arriving at base</li> </ul>   |
|                           |   |
| Who is the Evaluation for | <ul style="list-style-type: none"> <li>• Consider who the evaluation is for:</li> </ul>   |
|                           | <ul style="list-style-type: none"> <li>➤ Parents</li> <li>➤ Facility or school management/Governors</li> <li>➤ Group Leader</li> </ul>  |
|                           |   |

|                          |  |
|--------------------------|--|
| School or Service Name : |  |
|--------------------------|--|

## Appendix two - Risk Assessment (Form 2)

### Risk Assessment and Risk Management Record

**School/Youth Group** [Click here to enter text.](#)

**Learning activity** [Click here to enter text.](#)

**Group Leader** [Click here to enter text.](#)

**Other staff** [Click here to enter text.](#)



**Group size** [Click here to enter text.](#)

**Supervision ratio** [Click here to enter text.](#)

| IDENTIFYING AND ASSESSING THE RISKS | RISK LEVEL |      |               | CONTROLS FOR MANAGING THE RISKS |      |               | REMAINING RISK |      |               |
|-------------------------------------|------------|------|---------------|---------------------------------|------|---------------|----------------|------|---------------|
|                                     | Severity   | Prob | Level (S x P) | Severity                        | Prob | Level (S x P) | Severity       | Prob | Level (S x P) |
| <b>Heading</b>                      |            |      |               |                                 |      |               |                |      |               |
| •                                   | 1-5        | 1-5  | select        |                                 | •    |               | 1-5            | 1-5  | select        |
| •                                   | 1-5        | 1-5  | select        |                                 | •    |               | 1-5            | 1-5  | select        |
| •                                   | 1-5        | 1-5  | select        |                                 | •    |               | 1-5            | 1-5  | select        |

Form completion date: \_\_\_\_\_

**Risk Assessment Matrix**

|   |  |     |      |      |      |
|---|--|-----|------|------|------|
|   | Severity  |     |      |      |      |
|   | 1  | 2   | 3    | 4    | 5    |
| 5   | Med  | Med | High | High | High |
| 4   | Med  | Med | Med  | High | High |
| 3   | Low  | Med | Med  | Med  | High |
| 2   | Low  | Low | Med  | Med  | Med  |
| 1   | Low  | Low | Low  | Med  | Med  |
| Probability  |  |     |      |      |      |

|  |  |
|--|--|
| Points the Group Leader or team to be aware of |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

School or Service Name 

Form 3

**Parental consent for a school visit**

(to be distributed with an information sheet giving full details of the visit)

Class or Group : 1. Details of visit to: From:  Date/Time: To:  Date/Time: I agree to *(print child's full name)* taking part in this visit and I have read the information sheetI agree to *(print child's full name)* taking part in the activities described and acknowledge the need for responsible behaviour during the visit.

## 2. Swimming ability:

Is your child able to swim 50 Metres? Yes  No Is your child water confident in a swimming pool? Yes  No Is your child confident in the sea or in open water? Yes  No Is your child safety conscious in water? Yes  No I give consent for my child to participate in swimming activities Yes  No 

## 3. Medical information about your child:

(a) Any conditions requiring medical treatment, including medication? 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 exchange visits only:



(c) To the best of your knowledge, has your child been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may be contagious or infectious?

(d) Is your child allergic to any medication?

Yes  No

If Yes, please give brief details

(e) When did your child last have a tetanus injection?

#### 4. Declaration:

I agree to my child receiving medication as instructed and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present. I understand the extent and limitations of the insurance cover provided.

Contact telephone numbers:

Work  Home

Home address:

Alternative emergency contact:

Name:  Tel

Address:

Name of family doctor  Tel

Address

Signed  Date

Print full name

**This form or a copy must be taken by the group leader on a visit.  
A copy should be retained by the school contact.**

# FORM 3A

For routine educational visits and other offsite activities

Please complete the form below if you are happy for your child to:

- Take part in offsite educational activities
- Be given first aid or urgent medical treatment if required while participating in offsite educational activities.

Please note the following important information

The offsite activities covered by this consent form are:

- Sporting fixtures during the school day
- Sporting fixtures outside the school day
- Low risk offsite activity local to the school.
- Routine educational visits to low risk venues during the school day.
- Routine educational visits to low risk venues that extend beyond the school day

Prior to the activities taking place you will be given full details of the proposed visit and will have the opportunity to withdraw your child from the activity.

Activities not covered by this form are.

- Swimming
- Hazardous activities such as canoeing or climbing
- Residential activities

Separate consent forms will be sent out for these activities.

I consent to, taking part in such activities described above

|                               |            |               |
|-------------------------------|------------|---------------|
| Name of Child<br>Please print | Form/Class | Date of Birth |
|-------------------------------|------------|---------------|

|  |
|--|
| <p>Medical Information</p> <p>List conditions and where appropriate details of prescribed treatment or medication</p> <ul style="list-style-type: none"><li>• _____</li><li>• _____</li><li>• _____</li><li>• _____</li></ul> <p>Is your child allergic to any medication</p> <ul style="list-style-type: none"><li>• _____</li></ul> <p>When did your child last have a tetanus injection</p> <ul style="list-style-type: none"><li>• _____</li></ul> |
| <p>Doctor's Name</p> <p>_____</p> <p>Surgery Address</p> <p>_____</p> <p>Surgery Telephone</p> <p>_____</p>  |
| Specific dietary requirements  |

Please print

Any other relevant information

Please print immediately

Declaration

I agree to my child receiving medication as instructed and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present.

Emergency contacts name \_\_\_\_\_ Relationship to pupil \_\_\_\_\_

Address \_\_\_\_\_

Email address \_\_\_\_\_

Telephone numbers \_\_\_\_\_

Home \_\_\_\_\_ Mobile \_\_\_\_\_ Work \_\_\_\_\_

Emergency contacts name \_\_\_\_\_ Relationship to pupil \_\_\_\_\_

Address \_\_\_\_\_

Email address \_\_\_\_\_

Telephone numbers \_\_\_\_\_

Home \_\_\_\_\_ Mobile \_\_\_\_\_ Work \_\_\_\_\_

PLEASE INFORM THE SCHOOL IMMEDIATELY OF ANY CHANGE TO THE MEDICAL INFORMATION, OR EMERGENCY CONTACT NUMBERS GIVEN ON THIS FORM

PRINT FULL NAME \_\_\_\_\_

Signed \_\_\_\_\_ Date \_\_\_\_\_

