Educational visits policy
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Author	Simon Lancaster-Jones, Mike Rosser
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Review undertaken by	Simon Lancaster-Jones/ Mike Rosser
This document is available in Welsh	

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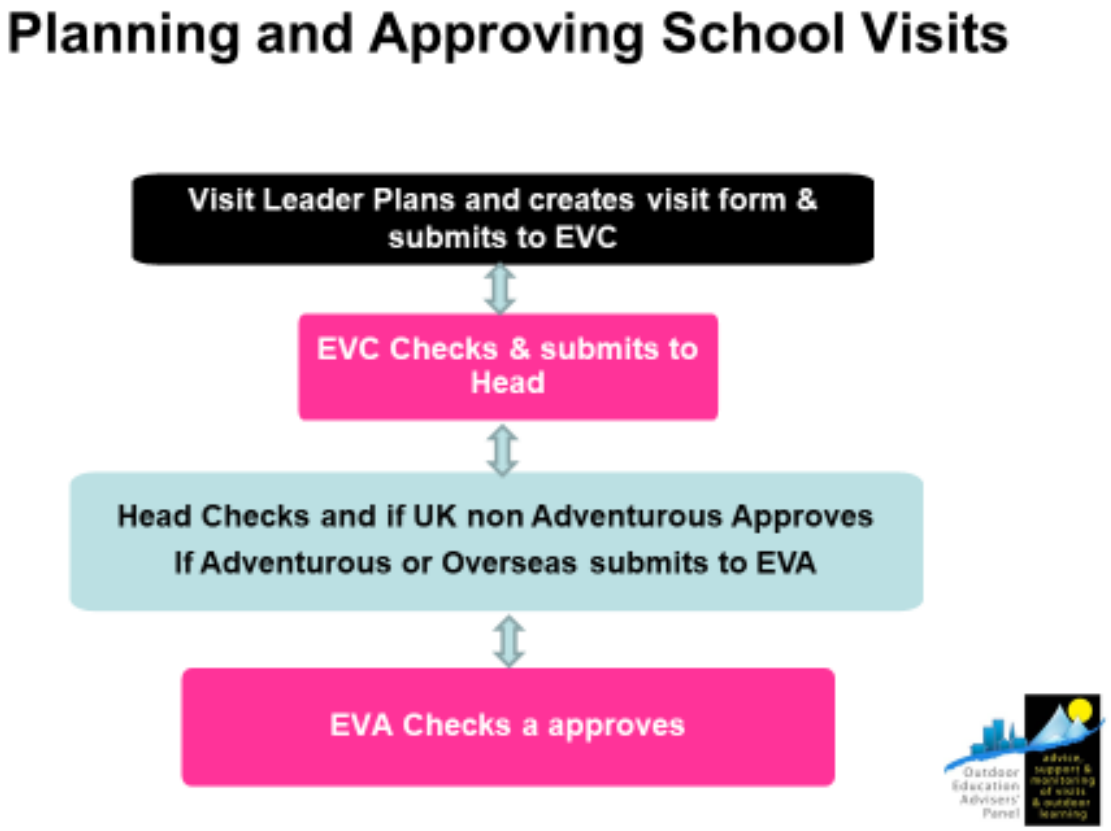
Roles and Responsibilities in effectively managing Educational Visits and Outdoor Learning

- **Visit leader and accompanying staff must be clear about why they are doing activities** (e.g. clear learning outcomes, risk management, evaluation), and be able to demonstrate impact
- **Schools must ensure the competence of EVCs and visit leaders** and be able to evidence their competence (clear approval procedures, induction & training (including the required training of EVC's monitoring, visit records etc).
- **Policies must be clear and robust** and all staff need to be familiar with them (Educational Visits Policy, our employer's policy, National Guidance).
- **We are measured against our employer's policies** – especially if something goes wrong (HSE, legal proceedings).

The Local Authority have duty to provide appropriate information, advice and training and will monitor the effectiveness of Schools / Establishments management and delivery of Educational Visits.

You can access all documents by logging in with your Hwb email address to SharePoint link *https://hwbwave15.sharepoint.com/sites/665/nwoes. or following the link from the document in Resources on Evolve to SharePoint*

Anyone organising an off-site visit must also refer to and follow the relevant guidance (relating to the nature of the visit being planned) as set out in the Outdoor Education Advisers' Panel (OEAP) National Guidance for Educational Visits www.oeapng.info.



Visit Leader

1. The designated person responsible for the Visit and who will have overall responsibility for the safety and conduct of participants and the Visit Leadership Team.
2. Visit Leaders will obtain the Head/EVC's approval for the visit according to school/ educational settings policy.
3. They will obtain LA leader approval if leading any adventurous/ demanding environments visit for which LA approval is required (Please see Page 18 section on LA Approval).

Below gives key requirements for you in your role and responsibilities as a Visit Leader. For further information Visit Leader | (oeapng.info)

Visit Leader Key Requirements

- Must be competent, confident and accountable to lead a visit.
- Visit leader must have the ability to lead to the level demanded by the visit, and has sufficient relevant experience and knowledge of the activities, the group and the environments they will operate in.
- Undertake and complete the planning and preparation of the visit, including the briefing of group members and parents/carers.
- Ensure the ratio of staff to young people is appropriate for the environment/activities and the needs of the group.
- Identify significant hazards and safety measures to reduce risk to a tolerable level and make known to parents, EVC and Head and others the level of residual risk that needs to be managed.
- Have enough information about the young people to assess their suitability for the visit or be satisfied that their suitability has been assessed and confirmed.
- Ensure that all accompanying leaders are familiar with these procedures.
- Make appropriate and adequate preparations for emergencies in conjunction with the EVC.
- Carry out dynamic risk management while the visit takes place and consider stopping the visit if the risk to the health or safety of the young people is unacceptable. Ensure procedures/alternative plans for such an eventuality are in place.

Educational Visit Coordinator

A key element of the policy/procedures is that each school/establishment has a **competent Educational Visit Coordinator (EVC) who has completed the county EVC training course and should attend regular on-line updates at least once every 3 years**. Due to the nature of the role the EVC must be an experienced member of staff:

1. who is part of, or **able to influence, the Senior Management Team**;
2. with **sufficient authority to make a judgement call** about the competence of any other staff member to lead an off-site visit and to approve or decline visits planned by any staff member;
3. The EVC is the **routine contact for dialogue with the LA Educational Visits Adviser**.

Below gives key requirements to you for your role and responsibility. We have kept these to a minimum. For further information Educational Visits Coordinator | (oeapng.info)

Key Requirements of the EVC:

- Ensure that all visits are planned and approved in accordance with this policy;
- Support the Head and Governors with approval decisions;
- Assign competent people to lead or otherwise supervise a visit;
- Carry out occasional monitoring of visit leaders to identify further training needs;
- Work with the visit leader to provide parents/carers with information about the visit and obtain the necessary consent from parent/carers;
- Ensure emergency arrangements and contacts are in place for each visit;
- Keep records of individual visits including what worked well, what didn't and any accident/incident reports.

Headteacher

1. Heads/Managers will ensure that the School Educational Visits Policy and procedures are updated and shared with staff, and that it conforms to and follows the requirements and recommendations of the LA.
2. Ensure that arrangements are in place for the educational objectives of all visits to be inclusive.
3. They will need to ensure that arrangements are in place for the governing body to be made aware of certain visits and ensure that visit arrangements and outcomes are evaluated to inform future visits and staff training needs.
4. Approve visit for **all** educational visits prior to visit date as set out in the table below on page 9:

Below gives key requirements to you for your role and responsibility. We have kept these to a minimum. For further information Head / Manager | (oeapng.info)

Key Requirements of the Headteacher

- Be aware that the appointment of an Educational Visits Coordinator (EVC) is critical to the implementation of this guidance and should be allowed sufficient time to fulfil the role, including attendance at OEAP-approved training. Heads/Managers may choose to designate themselves as EVC.
- Ensure that proper and effective support structures are in place in the event of an emergency or critical incident, including means of contacting the relevant LA Education Officer (Schools) or Principal Youth Officer (Youth Service) or LA emergency planning team and arrange for the reporting of accidents and incidents as required. Records of these should be reviewed regularly and this information used to inform future visits
- Where needed, have access to expert advice from their Education Visit Adviser.
- **The Head (Schools) or Head of establishment (non-schools) has a responsibility to ensure that any changes to their EVC is notified to the Education Visit Advisor so that he or she can take steps to train their replacement as soon as practicable.**

Governors

1. Members of the Governing Body should view their main role as being '**to enable and ensure'** that staff are fully aware of the employer's responsibilities under Health and Safety Law.
2. That the establishment has formally adopted the Education Visit Policy and that they have a robust system to support the implementation of the policy.

Below gives key requirements to you for your role and responsibility. We have kept these to a minimum. For further information Governors, Trustees and Directors | (oeapng.info)

Key Requirements of the Governing Body

- They challenge in order to be clear about of how outdoor learning and visits lead to a wide range of outcomes for children and young people and contribute towards establishment effectiveness.
- They ensure that the Education Visit policy and procedures are fully implemented (including emergency procedures – and it supports the principles of inclusion).
- The involvement of Board/Governing Body in the visit approval process is clear and approval and notification procedures operate effectively.
- Ensure there is a trained EVC who meets the employer's requirements, with a sufficient time allowance to fulfil the role and training to support the planning and delivery of visits and outdoor learning.
- There are monitoring procedures in place, activity is evaluated, good practice is shared and any issues are followed up to comply with statutory and employer's requirements.

Education Visit Advisor

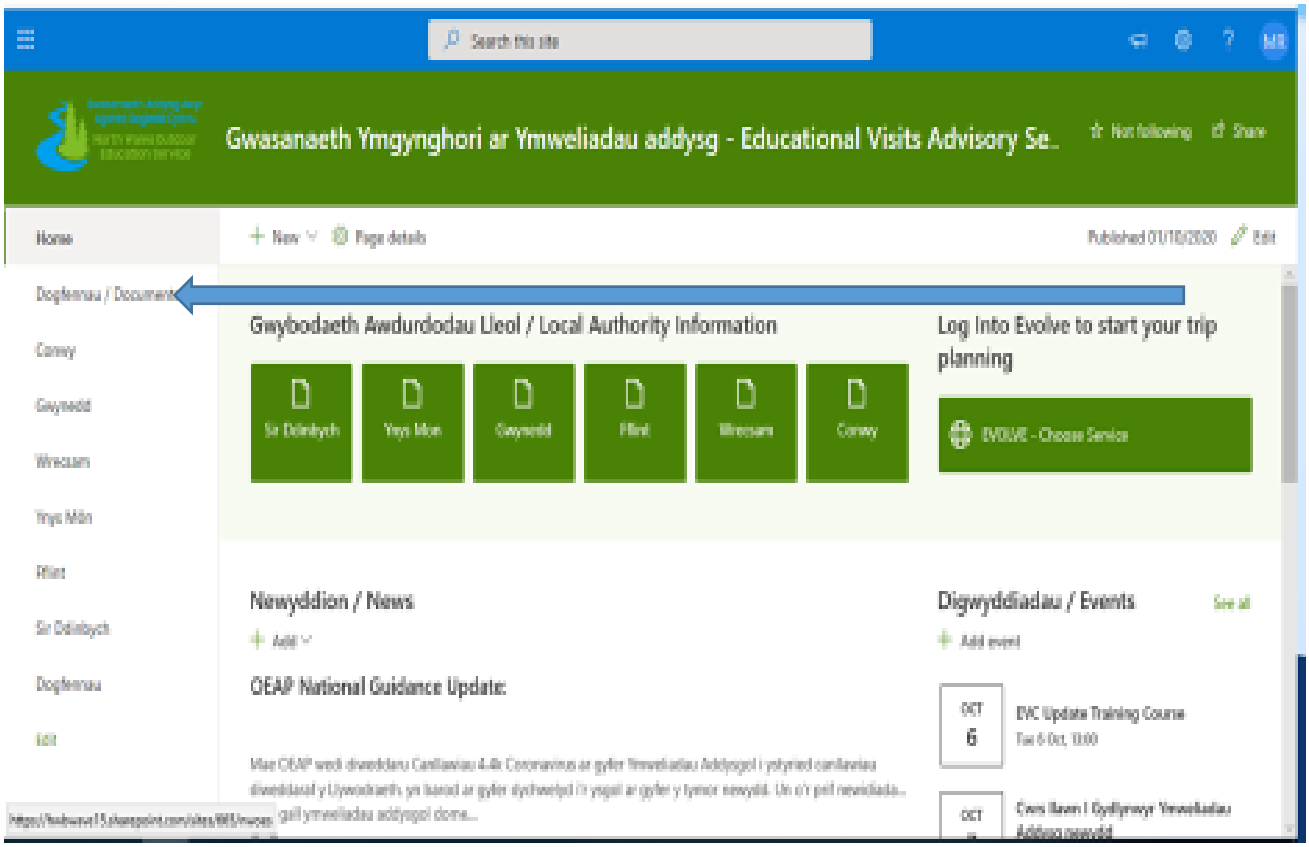
1. The Educational Visits Advisory Service fulfils the statutory functions to support the LA to meet its legal responsibilities and powers with regard to off-site and educational visits delivered to young people by its employees.
2. Provide expert advice on safety and quality of educational visits and on risk management in the context of all educational visits.
3. On behalf of the Local Authority approve (or disallow) visits for which LA approval is required, these include adventure activities, expeditions and overseas visits.
4. Monitor standards of Health and Safety management in off-site activity and educational visits, including observing activities and visits
5. Ensure that adequate and appropriate training is available and taken up by relevant employees.

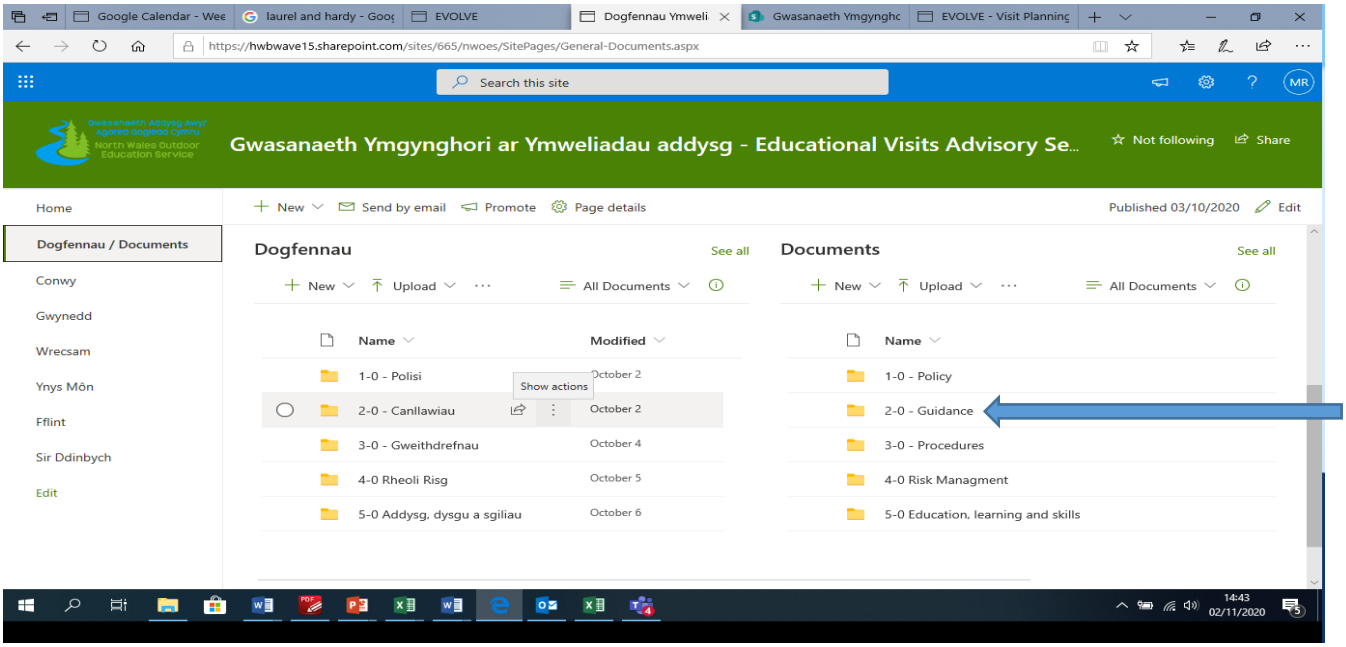
Key Requirement of Education Visits Advisor

- Ensure that EVCs, visit leaders, other school staff and other adults involved in educational visits are assessed as competent in their specific tasks.
- Ensure that LA guidance on Health and Safety of pupils on educational visits is provided to all LA educational establishments and is kept up to date with current best practice, including lessons learned from incidents in Wales and beyond.
- Fulfil the LA's approval role for specified categories of educational visits.
- Inform the LA and Board of Governors of noncompliance or visits that have not been approved by the EVA/LA.
- Verify the competence of LA employees who wish to lead visits in any of the areas or activities for which LA approval is required.
- Offer relevant training, advice and support to all educational establishments on the Health and Safety of pupils on educational visits and other matters relating to safety and quality in Outdoor Education.

Approval and notification requirements for visits

All visits must be approved as set out below. **LA approval decision for visits will be given via the Evolve system. Visit MUST NOT PROCEED UNTIL approval has been given. Visit submitted outside of the timescale set out in the table below run the risk of not being approved. Details on specific procedures for the types of Visit and relevant forms can be found on https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx**





Visit type	Planning and approval required
Routine visits (as defined in Educational visits procedures document)	**Planning** ***VISIT PLANNED USING LOCAL AREA VISIT PLANNING FORM ON EVOLVE. -*** These are visits that involve no more than an everyday level of risk and are covered by establishment procedures and policy. Such visits should require minimal planning or preparation beyond what is needed to make best use of the learning opportunity. In a school context, **they are simply lessons in a different 'classroom'**. They are based on generic risk management that is embedded in this Policy in the Risk Assessment section, with visit-specific risk management of anything that is out of the normal. Schools to amend the template in the Policy as required. **Approval** Heads approval for a member of staff to lead routine visits
Non-routine visits	**PLANNING** ***VISIT PLANNED USING THE VISIT FORM ON THE EVOLVE SYSTEM - BY VISIT LEADER / SUBMITTED BY EVC*** These are visits requiring additional planning**, and some level of visit-specific risk assessment**. A visit moves into this category because one or more aspects cannot be managed adequately by existing procedures and policy. This may be due to distance from the establishment, the nature of the activities, the environment or venue(s), the nature of the particular group, the need for specialist leader competencies, or any combination of these **Approval** • By the Head on the EVOLVE system **before the visit takes place** using their PIN number • **Visits that have not been approved by the Head on the EVOLVE system MUST NOT TAKE PLACE.**
A visit involving any of the following elements: • **Demanding environments** - including Field Studies and Forest School Activities (as defined in table 4 in the Educational visits procedures document) • **Adventure activities** (as defined in table 4 in the Educational visits procedures document)	**Planning** Visit planned using the EVOLVE system / Submitted by EVC **Approval** • Approved by the Head on the EVOLVE system using their PIN number **at least 14 days before visit start date.** • **LA approval required** –EVOLVE automatically applies for this after the Head approves the visit. • **Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE**
A visit involving an overnight stay	**Planning** – the selection of overnight stay should be inclusive for the age, and additional support needs of the group and support the learning objectives of the visit, and be cost-effective. Visits planned using the Visit form on the EVOLVE System/ checked and submitted by the EVC Approval • For domestic residential non adventurous - Approval by the head on the EVOLVE system using their Pin number • For **residential and adventurous provision** – Approval by the head on the EVOLVE system using their **Pin number at least 14 days before visit *START DATE*.** • **LA approval required** –EVOLVE automatically applies for this after the Head approves the visit. • **Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE**
Overseas visits and expeditions organised through an independent provider or by the school *(i.e. skiing, sports tours, cultural/ foreign language*	**Planning * (Please see additional notes below)** Initial approval before booking using the **Outline Approval for Overseas Visits form OE1** (available on EVOLVE forms section) submitted to the LA Following initial approval granted, Visit must be planned by the Visit Leader using the EVOLVE system / Submitted by the EVC **Approval**

visits and expeditions involving trekking or other adventure activities)	LA Approval is in two stages: • Initial approval for the planning phase must be requested at least **3 months prior to visit.** • Head approval on the EVOLVE system **at least 42 days** before the visit • **LA final Approval at least 28 days before the visit** – Evolve automatically applies for this after the Head approves the visit using their pin. • **Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE.**
Duke of Edinburgh Award expedition	**Planning (Please refer to additional notes below)** Visit planned using the EVOLVE system **Approval** • Approved by the Head on the EVOLVE system using their PIN number.**at least 14 days before visit start date.** • LA approval required –EVOLVE automatically applies for this after the Head approves the visit • **Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE.**

Example Adventurous Activities taking place in Demanding Environments – (Including Field Studies, Forest School type activities and Amusement Parks eg Alton Towers, Greenwood) - if not sure contact your EVA

Adventure Sports

- Abseiling
- Artificial wall climbing
- Bouldering
- Canoeing
- Caving
- Caving - Artificial
- Coasteering
- Ghyll scrambling
- Gorge walking
- Hill walking
- Horse riding
- Ice climbing
- Kayaking
- Kit Surfing
- Mine exploration
- Mountain Biking
- Mountaineering
- Orienteering
- Pony trekking
- Pot-holing
- Rock climbing
- Sail boarding
- Sailing
- Sand yachting
- Sea level traversing
- Sit on Top Kayaking
- Snowsports
- Stand Up Paddle Boarding
- Surfing
- Via Ferrata
- Wave Skiing
- Weaselling
- Whitewater Rafting
- Whitewater Tubing
- Wild camping
- Windsurfing
- Yachting

Games and Sports

- Athletics & Other Sports
- Archery
- Bell-boating
- Clay Pigeon Shooting
- Cycling
- Dragon boating
- Paintball
- Parachuting
- Paragliding
- Rowing
- Shooting
- Survival Skills
- Swimming - pool, sea, natural waters
- Swimming pools in hotels, hostels or campsites

Motorised Activities

- 4x4 Driving
- Go-karting
- Hovercraft
- Jet Ski
- Powered safety/rescue craft
- Quad Biking
- Segway
- Speedboats and Ribs
- Towed water sports / water skiing

Adventure Activities

- Assault Course
-
- Standing Camps
- Crate Stacking
- Dog sledging
- Hang Gliding
- High ropes courses
- Improvised rafting
- Jacobs Ladder
- Leap of Faith
- Low ropes courses
- Mountain Boarding
- Rock hopping
- Sledging
- Snorkel and aqua lung activities
- Team Building
- Zip wires
- Zorbing

Environmental Studies

- Bushcraft
- Field Studies
- Forest Schools
- River studies
- Coastal studies
- Urban studies
- Upland studies
- Wetland studies
- Studies using boats on canals, rivers and lakes
- Studies in quarries and at other rock exposures (hard hat areas)
- Expeditions
- Studies in caves and mines

DofE Award groups / Expedition groups

It is best practice to have a lead Expedition / Visit leader who holds the overview of the whole expedition and an appropriately competent deputy. Schools need to ensure that staff involved in remote lone working during expeditions are competent and aware of the safety implications including emergency procedure and relevant issues.

Leaders planning a DofE Award expedition or unaccompanied expeditions should read the Guidance for unaccompanied Expeditions:

https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx

This document is intended to set a benchmark for good practice for all involved and to ensure that the Expedition meets the requirements of the Local Authority.

Planning of Overseas Visits

Overseas visits require a longer planning, preparation period please read OEAP National Guidance Advice found OEAP NG7r Overseas Visits Take particular note of the advice given above about cancellation terms and conditions, and insurance. Liaise closely with your travel provider about the situation and consider the alternatives should your visit no longer be able to proceed.

Overseas visits fall into two broad types:

- Complete packages arranged and delivered by an external provider.
- Visits led by the establishment's own staff, or may involve input from a variety of partners and providers in the UK and overseas, but the overall delivery is co-ordinated by the establishment rather than by an external provider.
- In either case **it is essential that an initial LA approval must be obtained before booking confirmation**. **Initial LA approval MUST be sought by completing and sending the Overseas Visit Approval form OE1 to the Education Visit Adviser before booking.**

- **Initial approval for the planning phase must be requested at least 3 months prior to visit.**
- ***HEAD MUST* approve Visits planning n the EVOLVE system *AT LEAST 42* days before the visit.**
- **Final LA approval for the visit on the EVOLVE system at least 28 days before the visit start date.**

Overseas Expeditions

Please refer to the Guidance on Overseas Expeditions which can be found here:

https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx .

There are no UK statutory standards regulating Overseas Expedition providers, but the following are relevant:

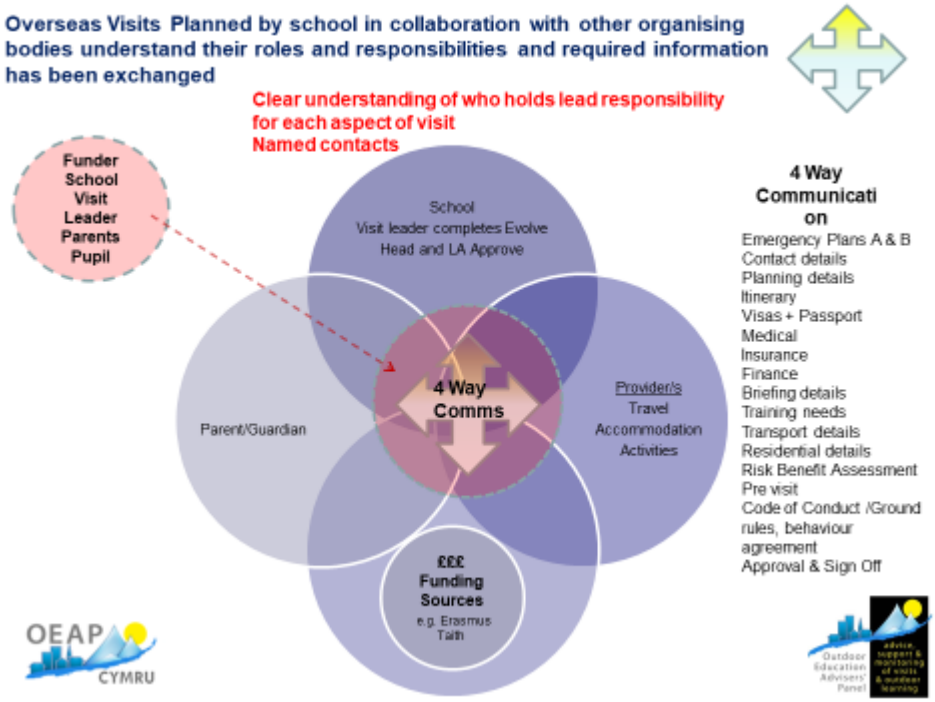
- The **Learning Outside the Classroom (LOtC) Quality Badge for Overseas Expeditions** gives assurance of both quality and safety, and is evidence that the provider claims compliance with British Standard BS 8848:2014. It does not involve any inspection of overseas work.

- **British Standard BS 8848: 2014** "a specification for the provision of visits, fieldwork, expeditions, and adventurous activities outside the United Kingdom" is a non-statutory standard against which providers can declare their conformity following self-assessment or assessment by an external body (there is no regulation of the assessing bodies). Any provider claiming to conform to BS8848 who was found not to provide what is required by the standard would be in breach of contract.

- The school / Education Establishment MUST provide parents with full information about the visit so that they can make informed decisions when consenting to the arrangements, including any "Plan B" alternatives. A pre-visit parental briefing session is good practice. It will provide an opportunity for parents to ask questions.

Overseas Visits Planned and led by the establishment's own staff - Checklist

Visits led by the establishment's own staff, often funded through Erasmus or Taith which may involve input from a variety of partners and providers in the UK and overseas, but the overall delivery is co-ordinated by the establishment rather than by an external provider.



Planning Check list:

- **Planning details** – OE1 Form completed to gain LA Pre Approval
- **Briefing details** – parents and pupils
- **Code of Conduct /Ground rules, behaviour agreement**
- **Finance and funding** - are the whole trip costs covered or are there additional costs
- **Pre visit** – these MUST be undertaken to any new destination
- **Contact details – UK and in country**
- **Itinerary –** ensure all aspects of the trip are covered
- **Risk Benefit Assessment** – covering all aspects of the itinerary
- **Residential details – hotels/hostels/home stays (DBS equivalent checks for host families or statements from host school**
- **Activity Providers** – checked Provider Statement
- **Training needs** – for school staff and pupils
- **Transport details** – coach/plane/ferry etc
- **Visas + Passport** - in date
- **Emergency Plans A & B**
- **Medical** – full disclosure to school and insurance company of any notifiable condition
- **Insurance –** ensure this covers pupils or staff unable to travel back with group due to illness or injury
- **Approval & Sign Off**

Summary of Procedures

Communicable Diseases Considerations for Educational Visits

Within the advice, it is recognised that COVID-19 has not gone away and will remain with us globally. For this reason, it remains important for schools and settings to consider what they can do to reduce the spread of the virus, and protect their learners and staff, including any additional protections for those who are more vulnerable

You should be familiar with Welsh Government advice and National Guidance documents relevant to your role, as the normal principles of good practice still apply.

Schools: coronavirus | GOV.WALES

OEAP National Guidance - https://oeapng.info/download/4835/

Managing the Financial Risks

You must ensure that you have authority from your employer before you enter into any contract on their behalf. If you do enter into a contract without such authority, you may risk disciplinary action or be personally liable for any costs involved.

All contractual agreements should be between the establishment organising the visit and the provider. You should not allow providers to agree contracts or waivers directly with participants or parents. Details given in advertisements, brochures, websites etc. do not necessarily form part of a contract.

You should check what is actually included in any contract that you agree., You should check what is included in the terms and conditions of your contract with the Provider to ensure that both schools and parents are clear about any financial consequences of cancellation. See document OEAP NG doc **3.2i "Contracts and Waivers"**.

Terms and Conditions:

When considering whether to agree a contract, you should make sure that you fully understand any relevant terms and conditions. You can often find these on a provider's website while you are in the process of selecting a provider. You should pay particular attention to any terms and conditions regarding:

- The timing and amount of deposits and payments, which are often linked to cancellations terms and conditions
- Where a provider's terms and conditions are not clear, or are not written in plain language, it may be better to look for a different provider.
- If there is anything you do not understand you should take advice or ask the provider for written clarification. If you are not happy with any of the terms and conditions, you should discuss these with the provider – they may be willing to negotiate changes.

Cancellation:

You should be clear about what will happen in the event of postponement, cancellation or curtailment by you, by the other party, or by any of the participants.

If your ability to pay for a visit depends upon payments from parents or participants, it is advisable to ensure that the payment and cancellation terms that you have agreed with them match your commitment to any providers.

You should also check that you have suitable insurance to cover cancellation or curtailment in the event of factors such as sickness or adverse weather, and inform participants or parents of any details of the insurance cover that is relevant to them.

Sometimes external factors such as a volcanic eruption, an epidemic, or a change in government travel advice mean that an event cannot go ahead as planned. You should check the terms and conditions, and your insurance policy, about what would happen in these circumstances.

Insurance

Refer to OEAP National Guidance https://oeapng.info/download/1150/ and contact your County Insurance Department so any specialist advice especially if traveling overseas

Public Liability Insurance held by ANY Provider MUST be at a minimum of £10m – please check this before submitting any Evolve forms.

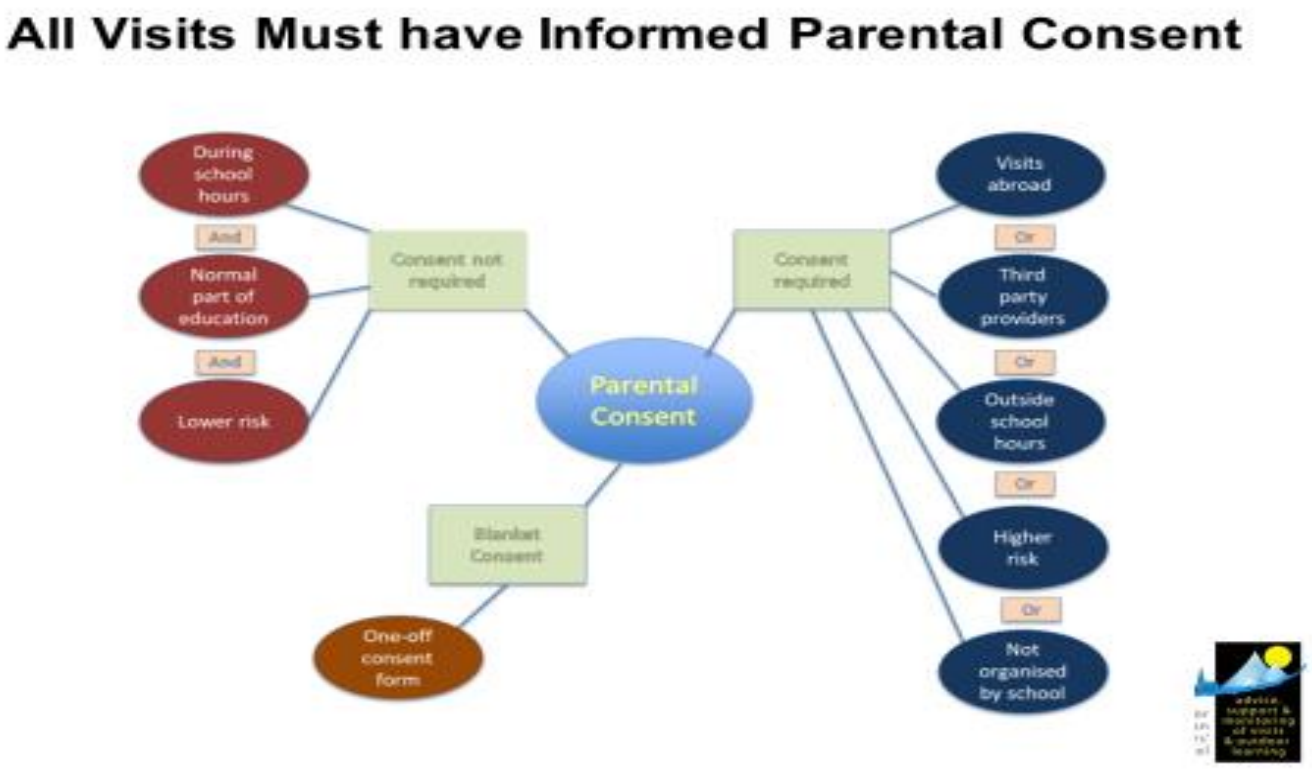
Establishments organising off-site visits away from their local area should have travel insurance which covers the planned activities. Your policy should cover:

- Personal accident;
- Cancellation and curtailment; personal liability; personal effects and money; medical expenses and repatriation. It may be available as part of, or as a supplement to broader insurance policies such as those negotiated by employers.

Care should be taken to ensure that the cover is not invalidated by circumstances that are possible when travelling with young people and you should consider the potential effects of an epidemic such as coronavirus when checking the cover provided by a policy. For example, will the insurance cover the cost of cancellation, curtailment or delay due to changes in government guidance or virus control measures (such as members of the group being isolated at home or in a hotel and prevented from travelling)?

Where the available cover is inadequate, consideration should be given to taking out additional insurance, or extensions to the policy. You are not obliged to take out insurance offered by a tour operator as part of a package. It should be compared with other available insurance. If a provider includes travel insurance in the price but you do not need it, you should ask them to remove it. **Please contact your LA Finance department for information regarding Insurance.**

Parent / Carer consent



Consent is required for all offsite and educational visits. Anyone organising an off-site visit should:

- Provide parents with sufficient information to make an informed decision about the participation of their child. Such information may be given in a variety of ways, as the information needed by parents will depend on the nature and complexity of the visit this to include any remote supervision .

- For routine visits **those listed on your Routine Visit Consent Form**, blanket consent is obtained.

- For non-routine visits i.e. **Overnight/adventurous etc**. consent is obtained for each visit (or series of repeated visits) using a **Non-routine Visit Parental Consent Form or Adventure Activities Consent form.** An example of a non-routine visit parental consent form can be obtained from the EVOLVE system by clicking on resources and then 'forms'.

- With appropriate security measures in place, parents can give consent electronically - e.g. by email, text, website or apps. Online systems that provide the option for visit-specific e-consent should have the facility for parents to confirm that they have been fully informed, and when and by whom the consent was given. Systems that use a hyperlink or attachment facility should enable the direct connection between consent and information about the visit.

- Where it is not possible for parents to update information electronically, as part of the consent process, it would be sensible to include a statement informing the school of any changes to my child's medical condition or individual needs (including any emotional wellbeing or mental health issues which may affect their participation in the visit), agreement to medical treatment and any changes to emergency contact numbers.

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

Inclusion

The overarching principle is that all pupils should be included in all education activities and experiences. The law requires that 'reasonable adjustments' are to be made to include pupils with additional support needs. This might include amendments to the programme, additional staffing etc. The Health and Safety of all pupils and staff on visits must also be considered.

When a visit or activity is being planned, all reasonably practicable measures must be taken to include all young people. Every reasonable effort should be made to find a venue and activities that are both suitable and accessible and that enable the whole group to participate fully and be actively involved. The principles of inclusion should be promoted and addressed in policy and practice, ensuring:

- An entitlement to participate.
- Accessibility through adaptation or modification, including the provision of auxiliary aids and services.
- Integration through participation with peers.

Sometimes it may not be possible to make reasonable adjustments to include a young person in a specific visit or activity, nor to provide the whole group with a suitable alternative, perhaps because of a severe disability. It is not necessary to deprive the rest of the group of worthwhile opportunities, if it is genuinely impossible to find a suitable way of including everyone, or after putting in additional support the Risk management plan still deems that pupils and staff may still be at risk.

Consideration must be given to the provision of a suitable alternative. The burden of proof is on the establishment, to show that what happened was for a reason other than unfair discrimination.

- Any adjustments that are made in order to include a disabled young person should not impinge unduly on the planned purpose of the activity.
- A decision to exclude a young person should not be taken lightly, and only after consultation with those who have responsibility for the young person, including (as appropriate) the head, EVC, Visit leader, Support staff, Parents, any third party provider, Education Visits Advisor and possibly their GP.

Behaviour

Exclusion for Behaviour is not one of the protected characteristics defined by the Equality Act.
It may therefore be acceptable to exclude someone from an activity or visit if their potential behaviour presents a significant, unmanageable and unacceptable risk to the health, safety or welfare of either themselves or others, or to the successful completion of the activity or visit.

However, if the behaviour is associated with a protected characteristic, great care should be taken to ensure that unfair or illegal discrimination does not take place. Where there is some doubt about including or excluding someone on the grounds of their behaviour, you should consider:

- addressing the issue at the earliest stage of planning
- involving all interested parties
- establishing a behaviour management plan with agreed action points that may enable inclusion on the visit
- establishing behaviour targets and timescales to be met to either allow inclusion or trigger a decision to exclude
- providing an additional adult, such as a parent or support worker, with a specific brief to manage behaviour issues
- ensuring that what is expected of staff is reasonable and within their competence
- recording this process

If someone is excluded because of their behaviour, alternative ways of achieving the same learning outcomes should be considered. Because outdoor learning and off-site visits are enjoyable, it can be tempting to use exclusion from them as a punishment for behaviour not connected to them.

However, this could give the wrong message about the educational worth of such activities. For example, if a school would not exclude pupils from an indoor maths lesson as a punishment for misbehaviour elsewhere, to exclude them from a visit as a punishment could suggest that the visit is less important but more enjoyable than the maths lesson.

Transport

The County does not approve transport Providers but it hires companies for the morning and evening school run. Many schools use the same companies for transporting pupils to offsite activities.

The below Transport Provider statement should be used to confirm that other comes you might use comply with regulations

https://oeapng.info/search-results/?download_search=Transport+Provider+Statement+

School staff driving Mini Buses (including Nine Seater vehicles)

Staff must comply with County regulations and guidance for minibus driving

For all but the shortest journey's there should be two school staff on any minibus. Both being able to drive on longer journeys

You must ensure you have the correct licence to drive a minibus and check with your county on MIDAS requirements https://ctauk.org/training/midas/ . Transport, Health and Safety, and Insurance departments can provide answers to specific questions.

Overnight driving or driving into the late night by school staff is to be avoided in all but essential cases.

- The risk of a fatigue related incident is increased by driving after working long days .
- There can be challenges with gaining access to services , accommodation, assistance is more difficult.

The exception to this is where an external professional company is employed to provide transport and are working within strict Department for Transport guidelines.

Further guidance can be found on OEAP National Guidance https://oeapng.info/search-results/?download_search=Transport

Charging for Activities

Schools and Education Establishments must take account of the law relating to charging for school activities, as set out in the Education Act 1996. Schools and local authorities must not charge for:

- Education provided during school hours
- Education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- Transport provided in connection with any educational visit of this type.
- Supply teachers to cover for teachers who are away from school on a visit

Schools **may** charge for optional extras, which include, education provided outside of school time that is not:

a) Part of the Curriculum.
b) Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
c) Part of religious education.
d) Board and lodging for a pupil on a **residential visit**, except to parents in receipt of certain benefits (broadly equivalent to those that qualify children for Free School Meals).
e) Extended day services offered to pupils (e.g. activity clubs).
f) Schools must inform parents on low incomes and in receipt of relevant benefits of the support available to them when they ask for contributions.

Using External Provider – pre-booking checks

Schools / Educational Establishments may use external providers to support, enhance or supplement their own resources to maximise the outcomes from a visit. You should consider how your establishments and providers work together, and in particular on the roles and responsibilities of establishment staff and provider staff.

A 'provider' means any person or organisation external to your establishment contracted to organise and/or lead all or part of a visit or activity. **As part of visit planning, any external providers should be assessed as suitable to meet the establishment's and group's needs and requirements, and relevant safety standards**.

- To reduce bureaucracy for both leaders and providers, you should take advantage of established national approval schemes. https://oeapng.info/downloads/download-info/4-4h-preliminary-visits-and-provider-assurances
- Check that any provider offers good value for money by comparing with other similar providers. Remember that there is no substitute for first hand, up to date information gained by a pre visit by staff.
- When using a specialist venue or activity provider please apply the following guidance before signing any booking form or contract:

Council for Learning Outside the Classroom

LOtC Quality Badge If the provider has the **LOtC Quality Badge** (Learning Outside the Classroom Quality Badge accreditation). The Quality Badge providers have pledged to engage in an ongoing process to sustain high-quality learning outside the classroom and who have demonstrated that they meet six quality indicators;

1. has a process in place to assist users to plan the learning experience effectively;
2. provides accurate information about its offer;
3. provides activities, experience or resources which meet learner needs;

4. reviews the experience and acts on feedback;
5. meets the needs of the users;
6. has safety management processes in place to manage risk effectively.

Providers that hold the LOtC Quality Badge are not required to provide schools with additional information on their Safety Management Systems or complete the Provider form

Providers who are not LOtC holders will need to complete the Providers Form (which can be downloaded from the EVOLVE system's Forms section) https://oeapng.info/downloads/download-info/8p-provider-questionnaire

- **Check that this has been satisfactorily completed by the provider before you book and/or upload the form onto Evolve.** This requires them to confirm that they have risk assessments in place for all activities/services that they provide and that these are available to view at the premises on request.
- Please **note that there is no need to obtain copies of the provider's risk assessments**.
- Seek specialist advice on any concerns arising from the provider's responses by contacting your LA Education Visits Adviser.

Note

Urdd centres – Planning a Visit

Glan Llyn (Instructor led activities) – Holds the LOtC Quality Badge currently , so no need for an independent provider questionnaire . Requires a school risk assessment for times the school staff are supervising pupils eg travel, out of activity time, meals, overnight, illness .

Llangrannog – (Instructor led activities) – Not a LOtC Quality Badge holder, so requires an Independent Provider Questionnaire (updated once a year). Requires a risk assessment for any staff led activities and times on the trip that staff supervise pupils e.g. travel, out of activity time, meals over night, activities on the way down.

Cardiff – (Mainly activity booking only)- – Not a LOtC Quality Badge holder so requires an Independent Provider Questionnaire for the centre and for each Adventurous activity you have booked. eg Voyager Rib in the Bay, Big Pit. The Urdd hold some of these for the current year so worth checking. Majority of activities are staff led , so requires a detailed risk assessment of how staff will manage activities as well as out of activity time eg travel, out of activity time, meals over night

*For all the above, include your plan if a pupil or member of staff is ill and has to return home

Approval of Visit Leaders

Schools should have clear processes for approving people to lead visits or activities. This should ensure that leaders are **accountable, confident and competent** to lead the specific visits or activities for which they are approved.

- Being **accountable** means that the leader has been engaged through an appropriate recruitment process, which includes vetting and induction into the establishment's policies and procedures.
- They should understand the chain of accountability, what is expected of them, and the establishment's policies and procedures.
- Being **confident** includes leaders having the ability to take charge of a situation while being aware of, and understanding, their abilities, as well as their limitations.
- Being **competent** means that the leader has demonstrated the ability to operate effectively, and has sufficient relevant experience and knowledge of the activities, the group, and the environments in which the visit will take place. Competence is a combination of skills, knowledge, awareness, judgement, training and experience. It is not necessarily related to age or position within the establishment.

Relevant experience is not necessarily gained by repeating the same thing several times, but by

experiencing a range of different activities and environments. Approval should never be assumed, and should involve professional judgement as well as evidence of technical competence.

The Head/Manager or Educational Visits Coordinator (EVC) (when the responsibility is delegated) should make a judgement about the suitability of that person to lead that group on that visit/activity in that environment.

Local Authority Leader Approval

Who needs LA leader approval?
Any school staff or volunteers who wish to lead any activity or visits in any of the demanding environments including Field Studies) or adventurous activitiesmust first be confirmed as technically competent to lead the activity by the Education Visits Adviser.
https://oeapng.info/downloads/download-info/6h-faqs-adventure-activity-qualifications

Details on activities in demanding environments / adventure activities can be found in the operational procedures (section 3.0) on **https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx**

LA Leader Approval Requests
The Person requiring approval **MUST** make a Leader Approval Request via their own EVOLVE account, these cannot be made by another person (EVC). To do this:

- EVOLVE Home Page
- Click the Blue Icon with two white Person
- Click on Awards and Training bottom left
- Click the Blue + button next to LA Leader Approval requests and complete the two sections:
    a. Details of the activity you are applying for
    b. A summary of your recent experience
    c. click continue
- Then Click on Blue + button Next to My Awards – browse your files and upload all relevant qualifications including an in date first aid certificate – click continue

Your Head will then approve your request and then the LA. Approval lasts for 3 years after which you will need to resubmit in the same way.

Approval is normally given only if the following conditions are met:

- The leader has completed a training course in the relevant NGB leadership award where one exists (or has undergone other appropriate training)
- The technical adviser has made a practical assessment of the leader and can confirm that they are operating at the standard of the relevant NGB leadership award or for a suitable level for site-specific approval to be given. (**To arrange technical adviser approval the EVC must identify an appropriate technical adviser who is willing to make a signed statement of competence for the visit leader)**

Depending on depth of experience and technical skill, leaders may be given approval to lead either:

- the activity/activities at specific, named venue(s) at any time for the duration of the approval period;

or

- the activity/activities at all venues that are within the remit of their competence at any time for the duration of the approval period.

Joint visits or collaborative visits

Joint visits planned with or by another establishment or organisation e.g. School, Youth Service, URDD, and Sports Officers

Any visit or activity involving young people from your school/establishment, or where young people have

been recruited through your school/establishment should be treated as one of your own visits **even if another school/establishment or external provider is taking the lead role in organising the visit**. Examples include:

- Sports fixtures/tours where your school/establishment has made young people/parents aware of the opportunity but where the tour is being staffed by other adults
- Collaborative visits with another school/establishment
- DofE Expeditions where young people from your establishment are joining another establishment's expedition
- Transition days organised by a Secondary school for primary school yr6 pupils – the Secondary school takes the lead.

For these visits, the young person's EVC and Head **must be able to evidence that they have**:

- Ensured that all aspects of planning for the visit meet the County requirements for visit planning and approval (another school/establishment may carry out this planning and approval if they are taking the lead role but if this is the case, the visit plan must include all young people and staff attending the visit from all schools/establishments involved and you must view and approve the visit plan)
- Been sufficiently involved in planning for the visit to ensure that the risk management and pastoral care arrangements (including an appropriate level of 24/7 supervision) are appropriate for the young person/people attending from their establishment
- Checked that the planned activities are appropriate for the young people from their establishment
- Ensured that parents are made aware of the arrangements for supervision and the activities planned and have given their consent to this
- Satisfied themselves that any activities being provided are being delivered by a suitably competent and insured activity provider or leader
- Satisfied themselves that the staff leading the visit are competent to do so e.g. confirmation by another school / establishment Head
- Ensured that the supervisory staff for the visit are made aware of any relevant additional needs **(including medical/dietary/behavioural)** for the young people taking part from their establishment
- Ensured that appropriate support will be provided by the visit leaders to manage any additional needs effectively
- Ensured that they can be contacted in the event of an incident, accident or other emergency

Collaborative Provision involves young people undertaking part of their education away from their home establishment, at sites run by other providers, for example by colleges, employers or training providers. See OEAP National Guidance https://oeapng.info/download/1210/

Providers may want to involve young people in outdoor learning, or off-site visits. Before any provider is used to deliver collaborative provision, the home establishment should ensure that the provider is appropriately vetted and that a contract or service level agreement (SLA) is in place, which clearly lays down the minimum required operating standards. This contract or SLA should include the arrangements for any outdoor learning or off-site visits. It should require providers to either comply with the policies and procedures for outdoor learning and off-site visits used by the home establishment, or to demonstrate that their policies and procedures covering this area are equally robust.

Responsibilities of the Home Establishment

The home establishment should ensure that:

- They have a robust policy that sets out the operational requirements for collaborative working which includes clear arrangements for the hand-over of responsibility for supervision;
- They have appointed a named co-ordinator to take oversight and responsibility for the collaborative arrangements;
- The establishment's policy for collaborative provision is shared with the provider, and that the

provider understands the requirements of this policy;
- If the provider does not comply with the same policy and procedures for outdoor learning and off-site visits, the home establishment should have a copy of the provider's policy and procedures and understand how these operate;
- There is a contract or service level agreement with the provider;
- There is effective two-way communication to ensure both the provider and home establishment are kept updated on specific health and safety, medical, special educational needs, disability and welfare issues;
- Parents are fully informed of the nature of provision (including any transport arrangements), and appropriate consents are obtained;
- Quality assurance procedures are agreed with the provider, including reporting procedures, and these are subject to on-going review;
- Transport arrangements are properly risk-assessed and subject to on-going review, informing parents as appropriate.

For all collaborative visits, the young person's EVC and Head must be able to evidence that they have:

- Ensured that each participating school should be sufficiently involved in planning for the visit to ensure that the risk management and pastoral care arrangements, including appropriate level of 24/7 supervision for their young people.
- Checked that the planned activities are appropriate for the young people from their establishment
- Ensured that parents are made aware of the arrangements for supervision and the activities planned and have given their consent to this.
- Ensured that the supervisory staff for the visit are made aware of any relevant additional needs **(including medical/dietary/behavioural)** for the young people taking part from their establishment
- Ensured that appropriate support will be provided by the visit leaders to manage any additional needs effectively.
- Ensured that they can be contacted in the event of an incident, accident or other emergency.

Guidance of the Management of cross County collaborative visits

Please read and follow the specific guidance on Cross County Collaborative Visits and Regional visits e.g., Ski Courses and Regional Sports Teams which can be found on SharePoint to ensure that best current practice is followed on collaborative visit.

https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx

ADD Use of Sorting Clubs to deliver activities ADD – commercial or not

Blanket approval for Educational Visits

Blanket approval may be given by:

- Heads for staff to run routine visits
- The LA for those staff who have gained LA leader approval

For visits that have been given blanket approval, the visit leader and EVC must ensure that relevant information is left with the school/establishment emergency contact including details of the venue, activity, group, transport, start/finish times and other relevant information for each visit.

Educational Visit and the threat of terrorist attacks or Civil Unrest

See OEAP National Guidance https://oeapng.info/download/3939/

Leaders should be mindful of the ongoing possibility of terrorism-related incidents, both within the UK and overseas, it's important to consider how to minimise risk and to ensure that in the event of an incident all participants know what action to take. We advise to exercise caution in public places. For up to date guidance please read the Guidance document which can be found on SharePoint:

https://hwbwave15.sharepoint.com/sites/665/nwoes/SitePages/General-Documents.aspx

Media Considerations

Electronic devices can on occasion, be of benefit. However, electronic devices can also be a hindrance. It is strongly recommended that there is control over indiscriminate and potentially damaging use of mobile phones and social media by groups on educational visits. The safeguarding of all participants is paramount and guidance for participants and parents needs to reflect the importance of this. This is especially important when dealing with the unlikely and unfortunate event of an incident / accident as this may impede the support of dealing with an emergency.

Record keeping/ Monitoring

Visits planned on EVOLVE

The EVOLVE system acts as a record for any visit planned and approved on the system.
Schools/establishments therefore only need to retain the following details for any particular visit:

- List of participants
- Parental consent forms (**NOTE: these can be destroyed 3 months after the visit if no accidents or incidents have been reported**)

Where an accident or incident has been reported the school/establishment should:

- Retain the parental consent form for the pupil(s)/young person(s) involved.
- If there has been an accident/incident on a visit, schools/establishments must ensure that the LA is notified according to LA procedures. The LA will keep accident/incident records until the young person reaches age 21 (or for 3 years in the case of an adult).
- Schools/ establishments therefore do not need to retain records of accident/incidents reported to the LA unless they wish to do so for their own purposes.
- If a visit leader or school/ establishment receives notification of a claim they should not respond directly but should pass the details to the LA claims manager/insurance section.

In addition, schools/establishments should archive in the school/ establishment records a copy of their:

1. Educational visits policy – dated so that the version current at the time of any visit can be traced;
2. Standard risk management procedures dated as current at the time of the visit;
3. Records of staff competence and training (perhaps as part of the appraisal/performance management records). This information should be kept for 5 years after which it may be destroyed.

Monitoring

Internal monitoring by the Head/EVC
The Head/EVC must monitor visit leaders from time to time to ensure compliance with school/establishment policy.
Monitoring by the Head/EVC should include:

- scrutiny of standards of visit planning and organisation as part of the visit approval process
- occasional observation of visit leadership

Following any observation of visit leadership it is good practice to provide the visit leader with verbal and written feedback and recommendations for further training if necessary. A copy of the observation report should be given to the visit leader and another copy kept on file by the school/establishment.

Monitoring by the LA

The LA will monitor schools/establishments on a 5 year cycle to ensure compliance with LA guidance. The LA will contact EVCs to notify them of an upcoming monitoring visit.

Incident Management

Emergency action flowchart for Visit Leaders and School Base Emergency Contacts

- This section sets out the action to be taken, in the event of an Emergency /Critical incident on an educational visit.
- Schools/ Establishments are provided with emergency action flowcharts and this must be carried by all visit leaders taking part in any offsite activity or visit.
- All staff on a visit must have all accompanying staff phone numbers and the school Emergency contacts on their phone
- ALL school EMERGENCY CONTACTS MUST be 24 hours even for a day visit in case of late return or incident

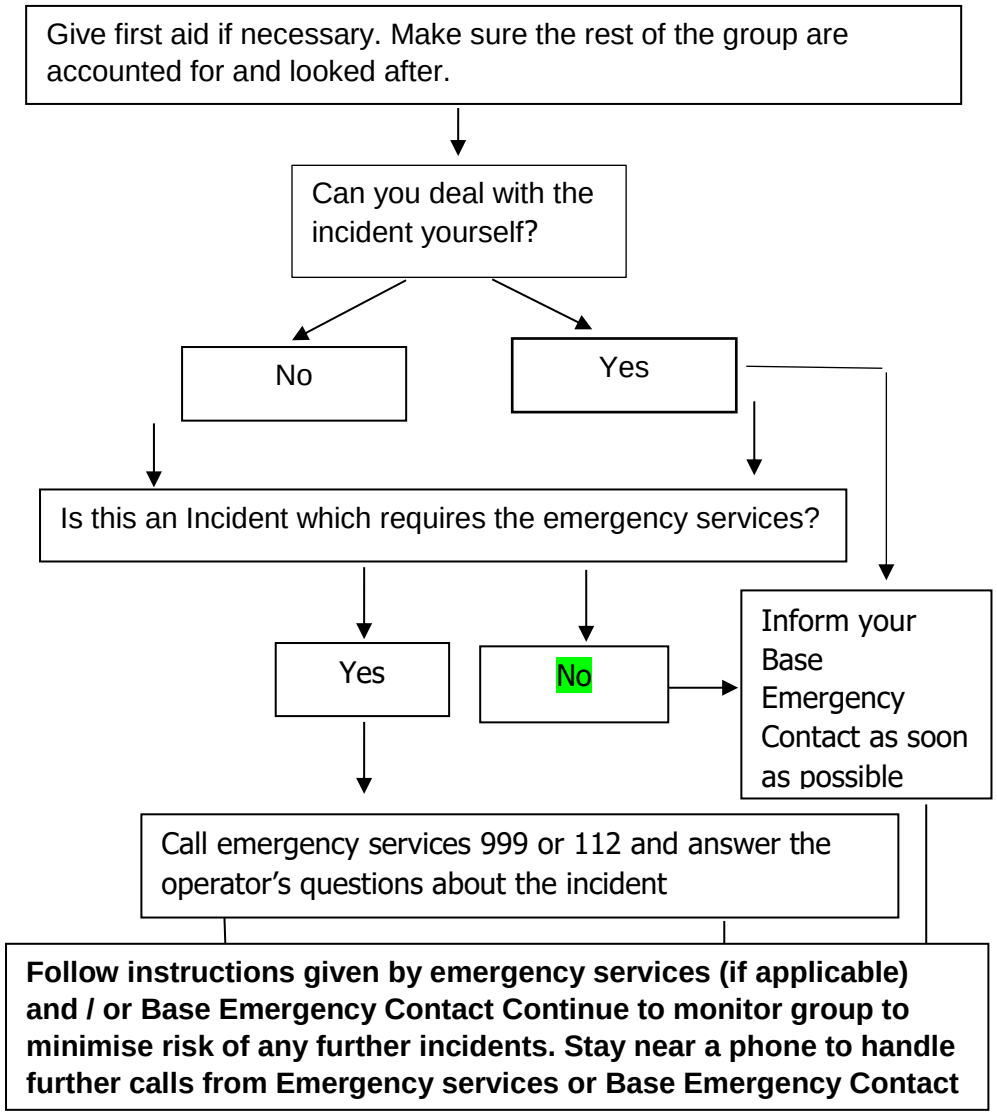
Definitions

1. Incident: a situation dealt with by the Visit Leader, who remains in control and can cope.
2. Emergency: an incident that overwhelms the coping strategies of the Visit Leader so that they refer to the Emergency Contact for help and may require the emergency services.
3. Critical Incident: an incident that meets the definition and is probably overwhelming the coping strategies of both the Visit Leader and the school's Visit Emergency Plan.

Emergency action flowchart for Visit Leaders

This flowchart must be completed by your establishment and carried by all visit leaders taking part in the visit.

In the event of an emergency - Do not speak to the media – Direct all media enquiries to Local Authority (LA) press officer



Emergency Contact Crib Card

1. School/establishment Office Number: 01244 830080
2. Base Emergency Contact

Name: Karen Burrows Tel: 01244 830080
Name: Rebecca Morgan Tel: 01244 830080

In the event of a Critical Incident or serious incident that can't be dealt with by yourself and where your Base Emergency Contact is not contactable contact the LA:

(Office hours)
Name: Mike Rosser Tel: 01492 643083
Name: Vicky Barlow Tel: 01352 704019
Out of office hours
Name: Mike Rosser Tel: 07568 408695
Name: Vicky Barlow Tel: 07775 706342

Emergency Procedures: LEADER / TEACHER INCAPACITATION

USE COMMON SENSE in terms of looking after yourself and group
PRIORITY IS TO KEEP GROUP SAFE AND WARM AND TO AWAIT FURTHER HELP –School safety procedures will kick in if a group is late back – help will arrive.

What to do

MAY NEED TO MOVE TO A SAFE AREA and out of immediate / further danger.
USE KIT TO KEEP GROUP WARM / SAFE
ADMINISTERING 1ST AID – may have to move if safe to do so.

PHONING FOR ASSISTANCE –

Use Leaders phone to ring:
School Base contact: 01244 830080 and/or **Emergency Services (999 or 112 if no signal)**

GIVE AS MUCH INFORMATION AS POSSIBLE:

- Location and details of the incident
- Numbers injured & name of instructor
- Action taken - NEED EMERGENCY SERVICES?

DO SUMMON HELP FROM OTHER GROUPS AT THE VENUE IF SAFE TO DO SO.

School/establishment office and the nominated Base Emergency Contact for each visit

Record information on *Educational Visits: initial incident notes.*

Do not speak to the media – direct all enquiries to County Press Officer

Is the incident serious? If unsure assume yes.

Serious = **involving serious injury, missing persons requiring assistance at the location, or evacuation**

YES

NO

Log telephone calls, action taken and timings and keep phone manned until incident is resolved.

Can the school/establishment handle this internally?

NO

YES

Call for external assistance from Emergency Services if required (if not already called by Visit Leader): 999 or 112

Arrange assistance as required by staff at the scene of the incident if possible e.g. transport / evacuation.

ASAP inform the LA that this is a **Critical Incident**:

Office hours –

Name: Vicky Barlow Tel: 01352 704109

Out of office hours

Name: Vicky Barlow Tel: 07775 706342

Continue to man the phone and coordinate support until the incident is resolved.

Follow-up

Complete LA incident/accident report form & send to LA.

Gather written statements from staff / adults / young people involved.

Head / EVC to assess incident (with LA officers if it was a critical incident), identify and implement action to avoid a repeat incident.

Inform staff and Education Visit Advisor and LA of any identified and implemented actions.

Educational Visits: initial incident notes

This form can be used by the Base Emergency Contact (or LA call handler) to take rough notes during the period that they are handling an emergency call. The Head must ultimately ensure that the LA incident/accident reporting procedures are completed as soon as possible after the incident.

Name and role of person making the emergency call _____

Contact number(s) for person making call _____

Name and number of Base Emergency Contact (if different from above)
_____

Name of group's school/establishment_____

Number in group and age range _____

Name(s) of any lost or injured individuals(s)
1.
2.
3.
4.

Time and date of incident_____ Location of incident_____

Activity taking place at the time _____

Vehicles involved (if applicable)_____

Description of incident and action taken (continue on separate sheets as necessary)

Form completed by_____ Date:_____

Risk management procedures

This section sets out the standard risk management procedures that are followed by staff of this school/establishment when leading off site visits.

- You **must** amend the risk management procedures in this section to reflect the way that **your** visit leaders manage routine off site visits.

- You must review your standard operating procedures to ensure that they include the measures, including public heath advice that you need to take to reduce the risks from **Communicable Diseases**
- It is important that it reflects actual practice on visits run by your school/establishment **– if it's written down then all will be expected to comply**.

- Once completed, this is the standard risk assessment for all routine off site visits run by your school/establishment and the template for all other visits.

- **All non-routine visits must** have a written risk assessment for risks identified for that visit including the **Risk Assessment for times when school staff are supervising pupils eg** Travel and activity supervision
-

If using an Independent Provider or on Residential Visits include

a) Out of activity time
b) Meals
c) Overnight supervision
d) Staff or pupil illness
    a. Isolation
    b. Returning home – parent pick up
    c. Replacement staff?

- **For Joint Visits** - **those involving one or more schools then all participating schools** must agree and sign the **Risk Management Agreement Plan** for **the visit (**please see below **Risk Management Form for Joint visits**)**.** These visits might include residential visits to Glan Llyn, Ski courses, Sporting Events etc.

Template Risk management form: All off site visits – Routine and Non Routine

- You **must** amend the risk management procedures in this section to reflect the way that **your** visit leaders manage routine off site visits.
- Date of last Review By_____

Significant hazards and harm which may occur	**Who might be harmed?**	**Safety measures:** *Measures that are in place and/or will be taken to reduce the risk to a tolerable level*
Crossing roads/walking along pavements	Pupils	• Brief children of conduct expected of them when walking/crossing roads • Ensure staff wearing hi-viz vests, are placed at front, middle and rear of children. • Pupils to walk in pairs or single file. • Members of staff to choose safe place to cross roads (if not using recognized pedestrian crossing) • 2 members of staff wearing hi-viz vests to stand in road with children walking between.
Weather conditions	Pupils/staff	• Check weather forecast prior to visit • Brief pupils/parents of possible weather conditions prior to visit • Ensure appropriate clothing/footwear is worn or taken bearing in mind Summer and Winter conditions • ***Ensure First Aid kit is carried by visit leader*** • ***Advise parents to pack additional food/water*** • Check with parents that it is OK to put sun cream on children • Take spare clothes for children not suitably prepared • Ensure emergency shelter is taken if in demanding environment
Scientific démonstrations at science venues	Pupils	• School/establishment staff to ensure that pupils follow instructions of qualified staff at venue and to adhere to rules regarding proximity
Trips, slips and falls	Pupils/staff	• Ensure appropriate footwear is worn and shoelaces tied • Brief pupils/staff of possible areas where trips, slips and falls may occur • Ensure First Aid kit is carried by visit leader • Ensure any medical conditions of pupils are disclosed prior to visit

Transport to and from venues	Pupils/staff	• Ensure recognised LA bus company is used and necessary checks carried out • Ensure seat belts are worn at all times and are checked by visit leader • ***If using establishment own minibus adhere to LA policies and procedures*** • ***Additional Transport risk assessment in place*** • ***Staff familiar with emergency exits on transport***
Stranger danger	Pupils	• Ensure children are made aware not to walk off with an unknown adult unless given specific instruction by visit leader. • Regular head counts • Supervised at all times, including appropriate supervision when toileting
Beach/coastal visits - washed into sea caught by rising tide	Staff and pupils	• Check tide times before embarking on trip • Check weather forecast for day of visit • Brief pupils and staff not to go near water's edge
Accident/emergency	Pupils & Staff	• Follow emergency procedure guidelines carried by visit leader • Ensure suitable staff helper (in addition to visit leader) understands emergency procedure • Brief children of what to do in an emergency and how to summon help
Getting lost/separated from group (outdoor venues)	Pupils	• Regular headcounts • Ensure pupils are to stay in small groups • Ensure staff accompany pupils at all times • Brief pupils to stay put if lost or separated and to shout for attention • Ensure all pupils know name of visit leader, staff and school/establishment name
Getting lost/separated from group (indoor venues)	Pupils	• Regular headcounts • Ensure pupils are to stay in small groups • Ensure staff accompany pupils at all times • Brief pupils to stay at venue if lost or separated never to leave the premises • Brief children to make their way to reception • Ensure all pupils know name of visit leader, staff and school/establishment name
Medical Conditions	Pupils and Staff	• Ensure medical conditions are disclosed prior to visit • Ensure consent is given for staff member to administer medicine if required • Ensure medicines, epi pens, inhalers, etc. are carried by visit leader • Ensure at least one staff member/adult volunteer knows how to administer medicine if required.

Walking in local countryside	Pupils	• Brief pupils and helpers of proposed route • Brief pupils of appropriate behaviour • Ensure member of staff at front, middle and rear of pupils • Ensure correct clothing and footwear is used
Absconding Students		• Identify which student/s / Staff member/s have absconded • Identify when was the last time you have seen them • Consider if they are late or if they have purposely absconded • Contact school for advice • School will either call the emergency contact or advise the staff on the visit to do so. • Review if the person/s have friends on the visit and if they have the person/s person's telephone number so that an attempt can be made to contact them directly, if needed. • Headteacher to be kept informed by the EVC • EVC / Headteacher to consider if this is an emergency. If so, follow DCC protocols • Post event, review and communicate with all parties
Farm Visits Machinery, vehicles, risk of allergy, contamination, bites, kicks, etc.	Pupils and staff	• Brief pupils to stay out of way of machinery/vehicles and to follow supervision by farm staff • Ensure parents have informed staff prior to visit of possible allergies • Ensure medicines are carried by visit leader (if required) • Brief children not to touch animals unless safe to do so • Ensure pupils/staff are made aware of farm rules, reinforced by farm staff • Ensure all eating is done in hygienic locations • Ensure children wash hands before eating • Make sure First Aid kit is carried
Castle visits High walls – falls Steep, dark stairs - falls	Pupils and staff	• Visit leader knows venue and specific areas of risk in the castle (following recce) • Brief other staff • Supervise pupils appropriately

Non-Route Activities and Visits Sample Assessments Templates

Template Risk management form: Residential trips

Add the details as required for your trip site eg single or shared site with other schools, Centre site eg forest, water, urban, city
Accommodation hostel/hotel/tents
Date completed By_____

Significant hazards and harm which may occur	**Who might be harmed?**	**Safety measures:** *Measures that are in place and/or will be taken to reduce the risk to a tolerable level*
Transport to and from venues	Pupils/staff	• Ensure suitable bus company is used • Schools staff have bus company and driver contact details • Ensure seat belts are worn at all times and are checked by visit leader. • Staff to ensure first aid kit to be on bus before leaving.
Meal times	Pupils	• Ensure children are made aware of the rules of the venue, all members of staff to supervise. • Children are reminded of the importance of hygiene before meal times including handwashing. • Dietary requirements sent to venue beforehand, school staff to also be aware of any requirements.
Out of activity time	Pupils	• Children are aware of the rules at the venue and reminded of the need for exemplary behaviour at all times. • All children to know where members of staff are at all times. • Staff are accessible to children at all times. • Staff to check on the children on a regular basis to ensure behaviour standards are met.
Overnight	)upils	• Children to be given clear instructions of when they are expected to go to sleep. • Members of staff to stay up for a period of time after lights out to ensure that all children are asleep. • All children to be aware of how to contact a member of staff if they are needed overnight. • Staff to check on each room before going to sleep. • Staff to follow procedure of the venue in terms of locking doors before going to sleep. • Children are reminded the need to stay in their rooms until instructed in the morning by a member of staff and to only leave in a case of an emergency.
Illness - Child		• Child to be cared for by a member of staff at all times.

		• Contact numbers for parents to be kept in a central place for all members of staff to access. • Parents to be contacted if members of staff feel there is a need. • Staff member to bring car in case of emergency – Business insured.
Illness – Staff		• Ensure enough members of staff are available in terms of ratios. • Member of staff to bring a car with them with business insurance. • School contact to be contactable throughout the trip.
Additional Needs / Medical issues / Behaviour		•
Emergency Procedures		• See Emergency Procedures flow chart in the Schools Visit Policy – A copy should be available to all staff on the visit • ……Emergency Contact **Mobile** Number
Roles and Responsibilities		• Provider responsibilities …….. • School Staff resbonsibilities…….

Template Risk management form: Day Visits		Add the details as required for your trip site eg single or shared site with other schools, Centre site eg forest, water, urban, city Date completed By_____
Significant hazards and harm which may occur	**Who might be harmed?**	**Safety Measures:** *Measures that are in place and/or will be taken to reduce the risk to a tolerable level*
Weather Conditions	Students / Staff	• Check weather forecast prior to visit • Brief students/parents of possible weather conditions prior to visit • Ensure appropriate clothing/footwear/sunscreen/lotions are worn or taken bearing in mind Summer/Winter conditions • Ensure emergency shelter is taken if in demanding environment
Trips, slips and falls	Students / Staff	• Ensure appropriated footwear is worn and shoelaces tied • Brief students/staff of possible areas where trips, slips and falls may occur • ENSURE FIRST AID KIT is carried by visit leader • Ensure any medical conditions of students are disclosed prior to visit
Transport to and from venues	Students / Staff	• Ensure recognised Local Authority bus company is used • Ensure head count is taken when getting on transport and on leaving transport • Ensure seat belts are worn at all times and are checked by visit leader • Ensure staff are placed at strategic points throughout the transport • Staff to ensure behaviour of students (distraction to driver/other road users) CCTV installed on all coaches to deter and/or review incidents
Getting lost/separated from group (outdoor venues)	Students / Staff	• Ensure regular head counts are taken • Ensure students are informed to stay in small groups • Ensure staff accompany students at all Brief students to stay put if lost or separated and shout for help • Ensure students follow/listen carefully to staff of venue for activities safety procedures (for those with medical conditions staff are to ensure that they fully understand

		what is expected) •

Risk Management Form for Joint visits

This form must be completed jointly and signed by the visit leader of all participating school(s) and shared with all leaders. This form should then be scanned and attached to the EVOLVE visit form.

Participating schools: Name of participating schools
Date risk assessment completed:
Completed by (name, school & signature):
Date of visit :

Significant hazards and harm which may occur	**Who might be harmed?**	**Safety measures:** *Measures that are in place and/or will be taken to reduce the risk to a tolerable level*
Transport to and from venues: • Road traffic accidents • Behavioural issues	Pupils Staff	• Ensure recognised LA bus company is used • Ensure seat belts are worn at all times by staff and pupils and are checked by school visit leader • Visit leader to have available information re pupils and staff in case of an emergency en route - first aid kit / sick kit. • Expectations of behaviour to be communicated to pupils at the beginning of the journey - e.g. pupils remain seated. • School staff supervise the pupils in their care to ensure they behave appropriately during the journey.
Accident/emergency: • To pupil • To member of staff	Pupils Staff	• Follow **provider** and school's own emergency procedures in • the event of an incident. • Ensure all staff understand emergency procedures. • Brief children of what to do in an emergency and how to summon help. • Ensure County accident / incident form is completed. • If an adult emergency, ensure enough supervisory cover remains throughout the visit.
Medical conditions (staff and pupils) & behavioural issues	Pupils Staff	• Ensure all consent forms are completed correctly prior to the visit and consent is given for staff member to administer medicine if required. • Ensure medical conditions of staff and pupils are disclosed prior to the visit and known to organising provider staff).

		• IEBPs /Personal Risk Assessment must be brought and shared with supervisory staff as and when appropriate • Ensure medicines, epi pens, inhalers, etc. supplied are stored safely and available to use in emergency. • Inhalers to be accessible to pupils during activity sessions • Ensure at least one staff member/adult volunteer knows how to administer medicine if required.
Time outside of Centre staff-led activities (including before/between/after activities, mealtimes and overnight): • Behavioural issues • Stranger danger	Pupils Staff	• Pupils given guidelines re expected behaviour around the centre between activities. • School's own behaviour policy to be implemented • Ultimate responsibility with staff from the individual schools. • Pupils are reminded of the rules / boundaries regularly. • School staff to be responsible for their pupils during free time and meal times.
Town/Resort visit: • Road traffic accidents • Stranger danger • Getting lost • Behavioral issues	Pupils Staff	• Brief children of conduct expected of them • Brief children on specific risks in town e.g. road traffic (and safe crossing point), stranger danger • Ensure staff are placed at front, middle and rear of children when walking as a group • Regular headcounts • Ensure pupils stay in small groups • Ensure pupils are accompanied by an adult at all times during the visit • Brief children on action to take if they get lost or separated from their group • Ensure that buses are up to standard, seatbelts are working and have a certificate of “road use”. Draw driver’s attention to any defects/ problems. • Train breakdown – discuss with train driver options available to the passengers and discuss with staff on train where possible.
Centre staff-led activities • Behavioural issues • Emergency or accident to pupil or staff member	Pupils Staff	• Inform supervisory staff of any issues regarding medical or behaviour. • Staff to report any incident or accident to manager of Centre and follow accident / emergency procedures.
		•

Space for Risk Assessments of Routine Visits