

## NORTH LINCOLNSHIRE COUNCIL

### CHILDREN, FAMILIES AND CULTURE CABINET MEMBER

## UPDATED EDUCATIONAL AND OFF-SITE VISITS POLICY AND GUIDANCE

### 1. OBJECT AND KEY POINTS IN THIS REPORT

- 1.1 To seek approval to publish and circulate the updated Educational and Off-Sites Visits Policy and supporting practice guidance.
- 1.2 The 'Educational *Off-Sites Visits Policy*' describes key principals the local authority (LA) will follow when managing the educational and off-sites visits function. The supplementary guidance supports staff implementation of the policy to ensure trips continue to be undertaken safely.
- 1.3 The policy and practice guidance supports the local authority to meet its statutory duties to its employees as required under the Health and Safety at Work Act 1974.

### 2. BACKGROUND INFORMATION

- 2.1 School and recreational visits are an important feature of a child's learning and education. Visits provide the opportunity of new learning environments and can help children to develop a range of new skills and experiences such as team working, confidence building and increased self-esteem. North Lincolnshire Schools and academies run a number of activities ranging from overseas skiing trips to local nature walks
- 2.2 The most significant updates to the Educational and Off-Site Visits guidance document include:
  - Guidance on school staff signing waivers and disclaimers
  - Updated advice from Department for Education (DfE) regarding charging for visits
  - Update to supervision ratios for residential trips, that a minimum of one member of staff should always attend
  - Update to first aid guidance that a trained first aider should attend residential visits and visits which include adventurous activities

- 2.3 The Educational and Off-Site Visits guidance document is mandatory for establishments where the LA is the employer. Additionally, North Lincolnshire Council offers professional advice and guidance to schools and academies through a service level agreement where the LA is not the employer. Organisations that purchase the service level agreements are required to adopt the NLC Educational and Off-Site Visits Guidance document.
- 2.4 The Department for Education promote outdoor education stating that; 'Children should be able to experience a wide range of activities, Health and Safety measures should help them to do this safely, not stop them.' (DfE 2014)

### **3. OPTIONS FOR CONSIDERATION**

- 3.1 That the Cabinet Member considers approving that the updated *Educational and Off-Sites Visits Policy and Guidance* is published and circulated to schools, academies and relevant internal services with effect from January 2019.

### **4. ANALYSIS OF OPTIONS**

- 4.1 The *Educational and Off-Sites Visits Policy* is a vital document that describes how the LA enables establishments to plan and undertake visits safely and in line with the latest national guidance.
- 4.2 The policy applies to local authority services, all community maintained schools and to academies and educational establishments where the visits SLA is bought from the LA. For establishments where the LA is the employer the guidance is mandatory, which means it has been adopted by the governing board of each school. Where an establishment is accessing the LA educational visits service but the LA is not the employer, the guidance must also be adopted by the governing board.
- 4.3 If the updated policy was not approved and the practice guidance not implemented, establishments would not benefit from the most up to date and relevant guidance for planning and running educational visits and the local authority would not be adopting best practice policy.

### **5. FINANCIAL AND OTHER RESOURCE IMPLICATIONS (e.g. LEGAL, HR, PROPERTY, IT, COMMUNICATIONS etc.)**

- 5.1 N/A

### **6. OTHER RELEVANT IMPLICATIONS (e.g. CRIME AND DISORDER, EQUALITIES, COUNCIL PLAN, ENVIRONMENTAL, RISK etc.)**

- 6.1 N/A

### **7. OUTCOME OF INTEGRATED IMPACT ASSESSMENT (IF APPLICABLE)**

- 7.1 An integrated impact assessment has been completed and no issues were identified.

7.2 **Statutory:** The *Educational and Off-site Visits Policy* supports the council to meet its statutory duties under the Health and Safety at Work Act 1974.

## **8. OUTCOMES OF CONSULTATION AND CONFLICTS OF INTERESTS DECLARED**

8.1 N/A

## **9. RECOMMENDATIONS**

9.1 That the Cabinet Member approves the publication and circulation of the updated Educational and Off-Site Visits policy and guidance to schools, academies and local authority services.

DIRECTOR: OPERATIONS

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Date: 29<sup>th</sup> October 2019

### **Background Papers used in the preparation of this report:**

1. Health and Safety at Work Act 1974
2. DfE Health and safety: advice on legal duties and powers (2014)
3. Outdoor Education Advisers Panel – National Guidance (<http://oeapng.info/>)
4. North Lincolnshire Council - Educational and Off-Site Visits Policy and Guidance (2019)



**North Lincolnshire Council**

**Educational and Off-Site  
Visits Policy**

Review Date:  
*August 2020*

# North Lincolnshire Council Educational Visits Policy

## 1.0 Introduction

1.1 North Lincolnshire Council (NLC) recognises the value of off-site visits and adventurous activities and fully supports and encourages those that are well planned and managed effectively. This policy sets out what the local authority (LA) will do to enable staff to assess and undertake educational visits safely.

## 2.0 Scope

2.1 This policy will apply when considering educational visit submissions from establishments where the local authority is the employer or establishments where the LA is providing the service under a SLA (see section 6 for differences regarding approvals).

## 3.0 Safety

3.1 The health, safety and welfare of children, learners, volunteers and employees is of paramount importance when arranging or leading a visit. No visit will be approved by the LA where it can be demonstrated that either:

- the 'Educational and Off-Site Visits Guidance' has not been followed and/or
- there is an unacceptable risk of harm.

3.2 The LA has a duty of care to look after their own and others health and safety under the Health and Safety at Work act 1974.

3.3 The LA, establishment staff and others also have a duty under the common law to take care of pupils in the same way that a prudent parent would do so.

## 4.0 Advice and guidance

4.1 The LA has an important role to play in helping establishments plan and undertake visits safely. In order to facilitate this, the LA will:

- Have a designated Educational Visits Officer (EVO) function which will offer advice and guidance on planning and undertaking educational visits.
- Facilitate the EVO to attend relevant training (i.e. Outdoor Educational Advisers Panel), regional / national networking (may be virtual) and maintain a record of continuing professional development.
- Have in place a plan for dealing with emergencies.
- Provide guidance for staff to follow when planning and leading an educational visit.
- Provide additional advice and updates to establishments directly, where appropriate, regarding best practice.

## 5.0 Providing Training for Staff

5.1 The LA will provide training opportunities for establishment Educational Visits Co-ordinators (EVC). EVC's must undertake the Outdoor Education Advisory Panel certificated course.

- 5.2 The LA will provide training and support users to access the educational visits recording system (currently EVOLVE).
- 5.3 The LA will monitor attendance and notify the head teacher / manager when training has not been accessed.

## **6.0 Approvals and recommendations:**

- 6.1 The process for approving visits will depend on two factors: A) whether the visit is considered high or low risk and B) who is the employer (e.g. academy or maintained school/LA service). These are described below:

### **6.1.1 For maintained schools where the LA is the employer:**

- Details of all visits must be entered on the LA recording system (EVOLVE).
- The head teacher will have delegated powers to approve low risk visits (Category A). The LA will have an overview of low risk visits and may comment/make recommendations (where appropriate) to head teachers.
- The LA will be responsible for approving higher risk visits (Category B - adventurous, residential and overseas activities).
- It is a legal requirement that employees follow their employer's guidance. The Governing Board/Management Committee will be provided with a copy of the 'Educational Visits Guidance' for adoption and implementation.
- Advice and recommendations will be sent to schools via the Evolve system.

### **For maintained schools where the LA is not the employer, but the Governing Board adopt the LA guidance:**

- Details of all visits must be entered on the LA recording system (EVOLVE).
- The head teacher will have delegated powers to approve low risk visits (Category A). The LA will have an overview of low risk visits and may comment/make recommendations (where appropriate) to head teachers.
- The LA will make recommendations for approving higher risk visits (Category B - adventurous, residential and overseas activities).
- It is a legal requirement that employees follow their employer's guidance. The Governing Board/Foundation Trust will be provided with a copy of the 'LA Educational Visits Guidance' for adoption and implementation. Overall responsibility remains with the Governing Board/Foundation.
- Advice and recommendations will be sent to schools via the Evolve system.

### **6.2.1 For academies where the LA is not the employer, but the Educational Visits service of the LA has been purchased:**

- Details of all visits must be entered on the LA recording system (EVOLVE).
- The head teacher will have delegated powers to approve low risk visits (Category A). The LA will have an overview of low risk visits and may comment/make recommendations (where appropriate) to head teachers.
- The LA will make recommendations for approving higher risk visits (Category B - adventurous, residential and overseas activities). Overall responsibility remains with the academy.

- Where an establishment uses the LA's Educational Visits SLA, the school or academy will be required to adopt and implement the 'LA Educational Visits Guidance' and any other relevant / subsequent documents.
- Academies will be responsible for checking their employer's insurance arrangements.
- Advice and recommendations will be sent to academies via the Evolve system.

#### **For LA services where the LA is the employer:**

- Details of all visits must be entered on the LA recording system (EVOLVE).
- The service manager will have delegated powers to approve low risk visits (Category A). The EVO will have an overview of low risk visits and may comment/make recommendations (where appropriate) to service managers.
- The EVO will be responsible for approving higher risk visits (Category B - adventurous, residential and overseas activities).
- It is a legal requirement that employees follow their employer's guidance.
- Advice and recommendations will be sent to services via the Evolve system.

### **7.0 Quality Assurance:**

- 7.1 The LA encourages establishments to use providers that hold relevant quality badges/ accreditations (i.e. Learning Outside the Classroom (LOTC) quality badge). Some adventurous activity providers are required to hold Adventurous Activities Licensing Authority (AALA) accreditation. When a provider does not hold an LOTC badge, establishments should complete the 'LA Provider Statement' to check that the provider meets the LA's minimum standards.

Where practical, establishments should undertake a preliminary visit to a new venue/provider to gather information and assess the educational benefits of a visit.

Providers of all adventurous activities must hold a minimum public liability insurance of £10m.

### **8.0 Monitoring:**

- 8.1 The LA will periodically audit a sample of educational visit records, venues and providers.
- The LA will keep a record of site checks/ monitoring visits completed.
  - The LA will support establishments with monitoring/ evaluating visits.
  - The LA will monitor accidents and near misses recorded by establishments. Where appropriate, the LA will follow up the resulting actions and support establishments to undertake post incident investigations.

#### **References:**

1. Outdoor Education Advisers Panel– National Guidance (<http://oeapng.info/>)
2. Learning Outside the Classroom Quality Badge – LOTC (<http://lotcqualitybadge.org.uk/home>)
3. Adventure Activities Licensing Authority – AALA (<http://www.hse.gov.uk/aala/index.htm>)



**North Lincolnshire Council**

**Educational and Off-Site  
Visits Guidance**

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This document is a revision of the 'Educational Visits Policy 2009'. This policy 'NLC Educational & off-site visits policy' is based on National Guidance and incorporates locally agreed arrangements for assessing and approving visits. This policy has been based on a template produced by a group of OEAP members led by C Atkins (consultant outdoor education adviser & Edufocus employee). Please note that this document has been designed to be used electronically so that all of the links and references can be accessed; for a list of the documents used please see appendix A.

## **Importance of Off-site Visits and Adventurous Activities**

North Lincolnshire Council (NLC) recognises the value of off-site visits and adventurous activities and fully supports and encourages those that are well planned and managed effectively. NLC promotes such positive learning experiences and encourages children and young people to take advantage of the fantastic opportunities provided by our various establishments and services. Supporting Off-site visits and Adventurous Activities is a key driver in engaging, inspiring and enthusing young people, enabling learning and development through real life experiences and helping all our young people to realise their potential.

## **Contact Numbers**

Emergency Call Centre (Out Of Hours)	01724 276444
Educational Visits Officer	01724 297022
Access Manager	01724 297893/ 07717 587689
NLC Insurance	01724 296073
NLC Public Relations	01724 296353

## **1 About this guidance**

### **1.1 Employer Guidance**

This guidance, '*NLC Educational & Off-site Visits policy & framework*', is the employer guidance for staff employed by NLC and all non-NLC staff whose employer has adopted this guidance.

In the event of an incident, staff will be asked if they adhered to this guidance. This guidance is based on recognised good practice and underpinned by National Guidance. OEAP/NG documents referred to in this document can be found at <http://oeapng.info/>

### **1.2 Purpose**

This document provides concise and supportive guidance for the planning and management of off-site visits and adventurous activities. It supports a common sense and proportionate approach to health and safety and risk management in line with the Government's drive to reduce wasteful bureaucracy whilst promoting the safety and wellbeing of all participants.

### **1.3 Status**

It is a legal requirement that employees follow their employer's guidance. Therefore Schools maintained by the Local Authority, Youth Centres and Projects maintained by the Local Authority, LA Pupil Referral Units, Duke of Edinburgh's Award activities, Activities organised or led by NLC staff or volunteers, whilst acting on behalf of NLC must adhere to this document.

For voluntary aided schools, academies and free schools, the employer is welcome to use this document along with NLC's systems and processes for approval and monitoring, although they must make it very clear should they choose to do so.

This guidance recognises and refers to the **OEAP National Guidance for Off-Site Visits** as the current National Guidance for Off-site Visits and Outdoor Learning.

### **1.4 The Local Authority/Employer**

The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety on educational visits with the employer.

For community schools, community special schools, voluntary controlled schools, LA pupil referral units, and youth service groups, the employer is the local authority. These establishments **must** adhere to this guidance document.

For voluntary aided schools, foundation schools, academies and free schools, the employer is usually the governing/trust/managing body. Although welcome to do so, these establishments are not obliged to use the guidance of the LA. If using LA guidance, this should be clearly stated. If not using LA guidance, establishments are advised to ensure that the guidance and systems in place meet or exceed the standards set by the LA.

Where the LA is the employer, the Governors should not normally be expected to approve visits, although they should have an overview of the visits that take place and should confirm that appropriate policies and procedures are in place.

Where the Governing body is the employer, the governors' responsibilities will be the same as those of the LA. In this case, the establishment's educational visits policy should make it clear if the establishment is following LA guidance.

Please also refer to the following OEAP documents:

- **Requirements and Recommendations for Employers**

- **Requirements and Recommendations for Establishments**
- **Underpinning Legal Framework and Duty of Care**
- **Member of a Management Board or Governing Body Responsibilities**

This guidance applies to all NLC employees (or any employer that has adopted this guidance) whose work involves, supervising, facilitating or oversee young people undertaking experiences beyond the boundary of their normal operational base and adventurous activities. This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

As an employer, NLC is required to ensure that its employees are provided with:

- appropriate guidance relating to Off-Site Visits and Adventurous Activities
- access to advice, support and further training to support the guidance and ensure that it is understood (e.g. EVC training)
- Suitable systems and processes that encourage good practice, as well as monitoring a range of visits.

## **2 National Guidance**

This guidance recognises and is underpinned by the following National Guidance outlined in Sections 2.1 and 2.2 .

### **2.1 DfE Advice on Health and Safety for Schools**

The **DfE Advice on Health and Safety for Schools (Feb 2014)** is eleven pages of general health and safety advice for schools, including advice on Educational Visits.

### **2.2 OEAP NG – National Guidance for Off-site Visits and Outdoor Learning**

This is web based guidance that replaces HASPEV (Health & Safety of Pupils on Educational Visits) and is now the recognised National Guidance for Off-site Visits, endorsed by a number of bodies including the NAHT (National Association of Head Teachers) and the NUT (National Union of Teachers).

There is a wealth of information and guidance on the OEAPNG website which is designed to support staff, managers, governors, employers and parents in the provision of high quality Off-site visits and Outdoor Learning.

**It is strongly recommended that all staff involved in leading, managing and overseeing Off-site visits familiarise themselves with the OEAPNG website so that the relevant guidance can be accessed when needed.**

## **3 Roles and responsibilities of Educational visits**

All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place. Visit 'Specific Guidance for Your Role' on the OEAPNG (National Guidance) website for more information and advice.

### **3.1 Educational Visits Coordinator (EVC)**

All establishments must appoint an Educational Visits Coordinator (EVC) who will support the Head of Establishment and help to fulfil the health and safety obligations for Off-Site Visits and Adventurous Activities. In small establishments the EVC may also be the Head or manager.

The EVC should:

- Liaise with the LA to ensure compliance with the current policy & procedures
- Be specifically competent, ideally with practical experience in leading and managing a range of visits similar to those typically run by the establishment. Commonly, but not exclusively, such competence will be identified in a person from the senior management of the establishment.
- Attend full NLC EVC training, and thereafter attend EVC update training at least once every 3 years. Training records will be held on EVOLVE.
- Support the head of establishment in ensuring that competent staff are assigned to lead and accompany visits, as providing support for approvals and other decisions.
- Oversee the management of the EVOLVE website for the establishment and ensure that all staff leading or accompanying visits have their own EVOLVE account.
- Ensure that staff leading and accompanying visits receive appropriate training and support.

For a full list of EVC responsibilities and further information refer to the OEAP National Guidance website. In particular EVCs should be familiar with the following OEAP documents:

- **EVC Responsibilities**
- **EVC Checklist**
- **Requirements and Recommendations for Establishments**

### **3.2 Visit Leader**

The key requirements for Visit/Activity Leaders are that they must be accountable, confident and competent to lead the visit/activity as they will have overall responsibility for the group. It is highly desirable that the Visit Leader should have prior experience of the type of visit to be arranged. Other adult supervisors should be fully involved from the planning stage, detailing their roles and responsibilities. The visit leader & support staff will be required to complete 'ongoing' risk assessments for the duration of the visit.

The following OEAP documents may be of particular interest and can be found in the 'Essential Guidance' section on the OEAPNG website.

- **Visit or Activity Leader Responsibilities**
- **Visit Leader Checklist**
- **Group Management and Supervision**
- **Good Practice Basics**
- **Ratios and Effective Supervision**

### **3.3 Support Staff**

Support staff/assistant leader is used to describe those members of the school's employed staff whose post normally involves the supervision of pupils. Support staff should be involved at the planning stage & be competent/ confident to take over should the visit leader be incapacitated.

The following OEAP documents may be of particular interest and can be found in the 'essential guidance' section on the OEAPNG website.

- **Assistant Leader Responsibilities**

### **3.4 Head/ Manger**

Head/managers should ensure their establishment follows the requirements and recommendations of their employer's guidance.

Head/ Managers should appoint a named EVC, they may choose to designate themselves as EVC/Head of establishment. The Head/Manager is responsible for approval of all category A (low level) visits unless this has been delegated. Head/ Managers should also ensure that there is an establishment policy that outlines expectations of how various visits and activities will be managed.

**All Heads/Managers should be familiar with the ‘Specific guidance for your role’ (for Head/Manager) which can be found by accessing the OEAPNG website.**

The following OEAP documents may be of particular interest and can be found in the ‘essential guidance’ section on the OEAPNG website.

- **Requirements and Recommendations for Establishments**
- **Requirements and Recommendations for Employers**
- **Head teacher responsibilities**
- **Head or Manager’s Checklist**
- **Writing an establishment visit policy**

### **3.5 Governors/Management**

Members of a management board or governing body should view their main role as being to ‘enable and ensure’ whilst having regard to their duty of care. They should have an overarching view of educational visits; ensuring that arrangements are in place to manage visits and that these are maintained.

The following OEAP documents may be of particular interest and can be found in the ‘essential guidance’ section on the OEAPNG website.

- **Requirements and Recommendations for Establishments**
- **Requirements and Recommendations for Employers**
- **Member of a Management Board or Governing Body Responsibilities**
- **Management Board and Governor Check List**

### **3.6 Employers**

An employer must ensure that its employees are provided with appropriate guidance and training and must ensure that this has been understood.

Employers must ensure that emergency procedures are in place & that systems are in place to monitor educational visits arranged by North Lincolnshire schools.

The following OEAP documents may be of particular interest and can be found in the ‘Essential guidance’ section on the OEAPNG website.

- **Requirements and Recommendations for Employers**
- **Requirements and Recommendations for Establishments**
- **Underpinning Framework and Duty of Care**

### **3.7 Parents/ Guardians**

The term ‘parent’ refers to parents, legal guardians or others who have legal responsibility for a visit participant. Parents should expect to be able to make an informed decision about whether their child should take part in an activity, whether this takes place outside of normal school hours or involves adventurous activities, the school will provide full details.

The following OEAP document may be of particular interest and can be found in the ‘essential guidance’ section on the OEAPNG website.

- **Guidance for those in a position of Parental Authority**

## **4 Competence to Lead**

The competence of the visit leader is the single most important factor in keeping the group safe.

The EVC and/or Head of Establishment must therefore consider the following when assessing the competence of a member of staff to lead a visit:

- What experience has the leader in leading or accompanying similar or other visits? (Check Visit History on EVOLVE).
- Is the leader competent in planning and managing visits?
- What are the leader's reasons for undertaking the visit?
- Is the leader an employee of the local authority?
- Does the leader have the ability to manage the pastoral welfare of participants?
- Does the leader exhibit sound decision making abilities?
- What experience has the leader of the participants they intend to supervise? (SEN/ Medical needs)
- What experience has the leader of the environment and geographical area chosen?
- Does the leader possess appropriate qualifications?
- If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- If leading adventurous activities, has the leader been 'approved' by the LA and updated their ALF on EVOLVE?
- Is the leader aware of all relevant guidelines and able to act on these?

Refer to OEAP document:

- **Assessment of Competence.**

## **5 Reducing Bureaucracy**

NLC is committed to reducing unnecessary bureaucracy therefore planning and recording for Off-site Visits and Adventurous Activities should be proportionate to the level of risk involved.

Local, routine, low risk visits are likely to require minimal planning whereas an expedition abroad will need considerable and detailed planning over an extended period of time.

- Establishment procedures should not involve any duplication of paperwork/administration
- Simple visits should be quick and easy to organise
- Paperwork and procedures must not be perceived as a barrier by staff

Refer to the following documents:

- **Writing Policies to Reduce Bureaucracy**
- **School trips and outdoor learning activities: Tackling the health and safety myths (HSE)**

## **6 EVOLVE visits website**

NLC uses the web-based system 'EVOLVE' to facilitate the efficient planning, management, approval, and evaluation of visits. All staff that lead or accompany visits should have their own EVOLVE account, which is set up by their establishment's Educational Visits Coordinator (EVC), so that they have access to visit planning details and relevant guidance.

As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including: search and report facilities, downloadable resources and information, staff records and visit history, etc.

This guidance is written to work hand in hand with the EVOLVE web-based system.

EVOLVE: <http://www.northlincsvisits.org.uk>

Please contact your EVC in the first instance or the NLC Educational Visits Officer for further support and training on the EVOLVE system.

## **7 Approval and notification**

Different categories of visits will require either *Approval* by or *Notification* to the Local Authority (LA). For visits where approval is not required by the LA then the approval is delegated to the Head/Manager, and notification sent to the LA.

**ALL** visits must be approved by the LA/Employer **or** the Head/Manager in advance of the visit in accordance with this guidance. The approval and notification process within the establishment should be clearly detailed in the Establishment's Off-site Visits Policy.

### **7.1 Categories of visits**

All visits must be placed in to either category A or category B so that proportionate planning can be put in place for the visit relative to the complexity and the level of risk involved.

Category A visits – routine, low level visits which include day trips, community visits, or low level/non-hazardous activities held over one day only.

Category B visits – visits and activities that are regarded as a having a higher level of risk than Category A, including adventurous activities, residential and overseas visits.

### **7.2 Approval Times Required**

Where possible, visits should be submitted for approval in good time. Staff should be aware that EVCs, Heads/Managers and the LA have other responsibilities as well as visit approvals and that staff should not place undue pressure on colleagues or the LA with regard to visit approvals. The amount of time required to process and approve a visit will depend on the level of complexity. Time must be allowed to consider each visit in detail and request further information or clarification where necessary so that informed decisions and judgements can be made by those responsible for approving visits.

To ensure that visits can be managed effectively the following lead in times should be adhered to:

**Cat A Visits** It is recommended that category A visits should be submitted to the EVC by the Visit Leader **7 days** prior to the visit date. Establishments may wish to amend this to reflect their circumstances.

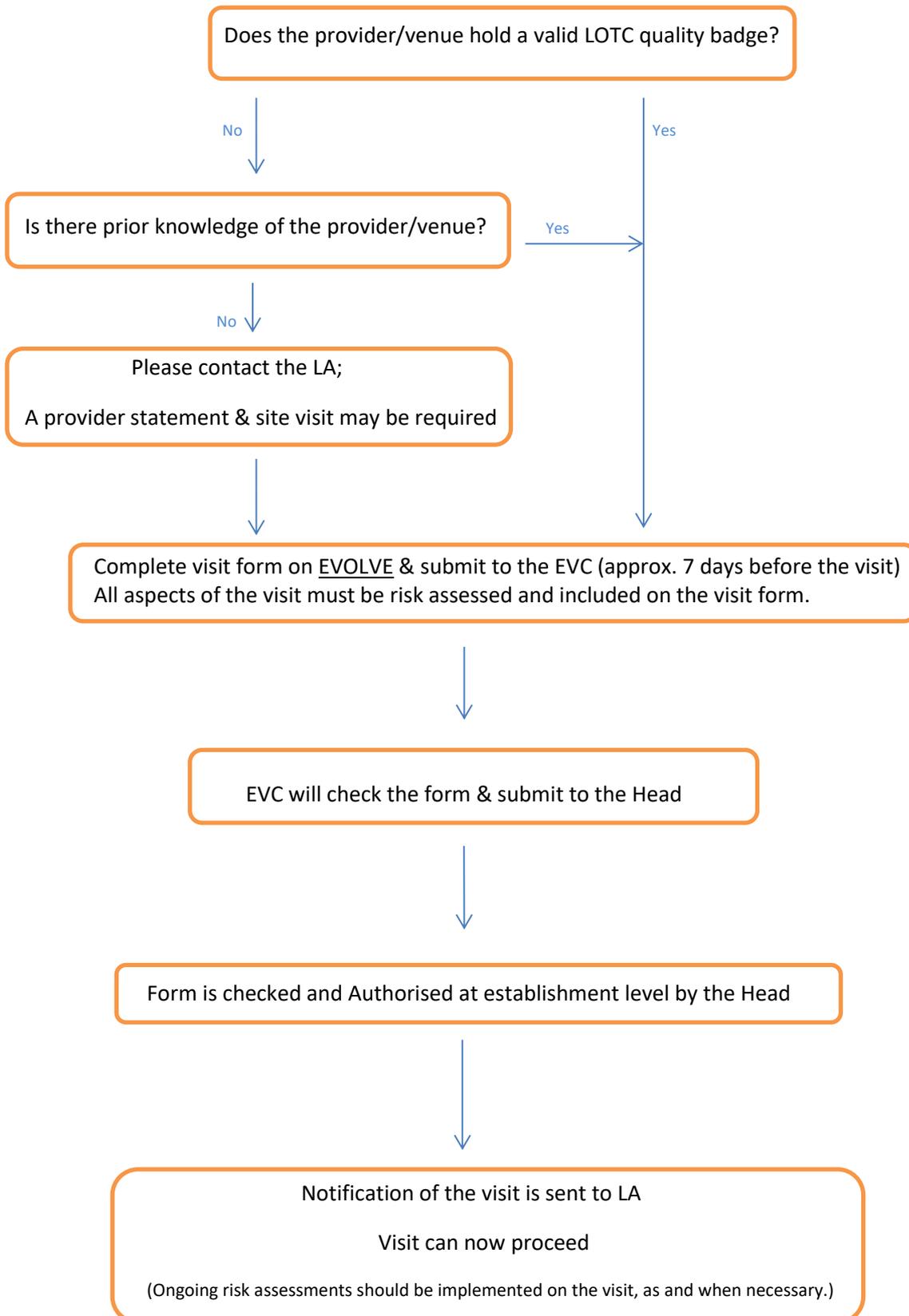
**Cat B Visits** It is recommended that category B visits should be submitted to the EVC by the Visit Leader (via EVOLVE) **at least 4 weeks** prior to the visit date.

The visit should then be Authorised by the Head/Manager and submitted to the Local Authority for approval **at least 3 weeks** prior to the visit date.

On the following pages you will find the approval system for both category A & B visits.

Some flexibility will be required to accommodate a degree of spontaneity and pupil/young people led activities, especially with category A visits. Although Off-site Visits should normally be part of a planned programme, where opportunities arise at short notice, please contact your EVC/EVO as visit approval can often be fast-tracked so that young people don't miss out on such opportunities.

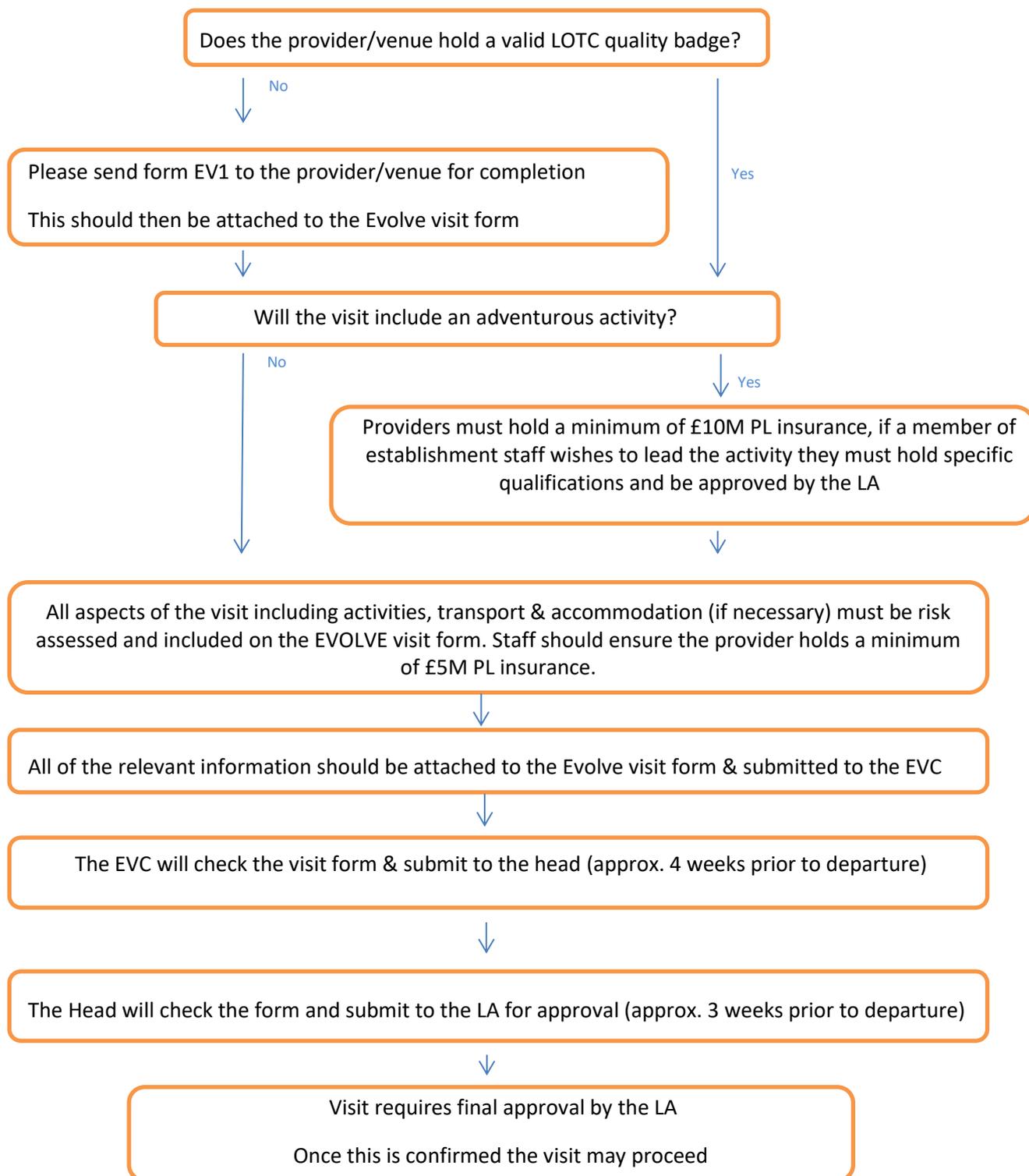
## Process for Category A approval



# Process for Category B approval

(Overseas, Residential & Adventurous visit types)

If overseas/expedition or highly adventurous, has initial approval been granted from Head, Gobs & LA?



## **8 Planning**

### **8.1 Planning visits using the EVOLVE system**

Educational visits have an important part to play in the life of an education establishment and an essential part of the delivery of the curriculum therefore planning should reflect your establishment's procedures, employer's requirements, legal requirements and good practice. Sufficient time should be allocated to the planning stage.

EVOLVE provides a means of recording planning during the planning phase, and enables the EVC and Head/Manager to monitor, contribute and support the activity. It is important for all staff associated with the visit to be involved at the planning stage in order to be fully informed on all arrangements including generic, specific and ongoing risk assessments. The degree and complexity of a particular plan will need to reflect the nature of the given activity.

The extent of planning required is related to the complexity of the visit. See the following documents for further information:

- **Visit Leader Checklist**
- **Good Practice Basics**
- **Planning basics**
- **The Radar Model**
- **Learning Outcomes mind map**

Many aspects of planning will normally already be in place in the form of existing policies and guidance, LA policy, etc. These, in conjunction with the EVOLVE Visit Form may be sufficient for a particular visit, as it is not necessary to repeat generic policies on EVOLVE. For more complex (Category B) visits additional documents and risk assessments can be attached to the EVOLVE visits form.

### **8.2 Learning Outcomes / Purpose of visit**

Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved. Up to four intended outcomes may be recorded on EVOLVE during the planning process, for subsequent evaluation.

Work that takes place outside the classroom can provide a very powerful means of developing learning in all curriculum areas, and can make a positive impact in helping to raise attainment, attendance and behaviour. Learning Outside the Classroom can also provide opportunities for development in other areas, including:

- Environmental
- Cross curricular
- Emotional & spiritual
- Relationships
- Communication
- Independence
- Resilience
- Self confidence
- Teamwork

Appropriate preparatory work should take place in advance of the visit. This, in conjunction with activity that will take place during the visit, should feed into any follow up work.

Refer to OEAP documents:

- **Rigorous Evaluation of LOtC meeting Ofsted expectations**
- **Planning Basics for Outdoor Learning, Off Site Visits and Learning Outside the Classroom**
- **Learning Outcomes Mind Map**

### 8.3 Staffing, ratios, effective supervision and remote supervision

#### Early Years Groups

Ratios for Early Years are specified and must be adhered to; see **Statutory Framework for the Early Years Foundation Stage**.

#### All Establishments

On all visits there must be effective supervision that has been approved by the EVC and Head of establishment. Support staff/ teaching assistants should not be used without a teacher where the visit is a category B unless they have technical qualification or they have been trained/ assessed using recognised routes. The visit leader retains a duty of care for the group at all times, unless the responsibility for providing care & supervision has been formally handed over to an appropriately selected third party provider for a specific period. Anyone taking part in activities must abide by any specific guidelines for that activity.

Mixed groups of any size on visits of an extended nature should preferably include at least one male and one female supervisor. It is highly desirable for mixed groups to have mixed staffing for all activities. In the case of single gender groups, at least one of the accompanying adults should normally be of that same gender. The minimum requirement for trips abroad is 1:10 with all groups having a minimum of 2 staff, there should always be enough staff to cover an emergency. All residential visits should be accompanied by a minimum of 2 staff.

For all visits the visit leader, EVC and Head of establishment will make a professional judgement regarding the number and suitability of staffing on an individual visit basis after consideration of the following factors:

- the type, level, and duration of activity
- the nature and requirements of individuals within the group, including those with additional needs
- the experience and competence of staff and other adults
- the venue, time of year and prevailing/predicted conditions
- the contingency, or 'Plan B' options

The National Guidance does not prescribe specific numbers for supervision, although the ratios below are recommended as a minimum starting point for consideration at each key stage:

- Under 5years old – 1:4
- Key Stage 1 – 1:6
- Key Stage 2 – 1:10
- Key Stage 3 - 1:15
- Key Stage 4+ – 1:15

A visit must not go ahead where either the visit leader, EVC, or Head teacher is not satisfied that an appropriate level of supervision exists. **The above figures are a minimum requirement and it is advised that visit leaders use the following factors when establishing the correct numbers for their group;**

- **Staffing** (Including competence, experience, ratios, effective supervision)
- **Activity** (Programme, activities to be undertaken. Who will lead? Adventurous?)
- **Group** (Additional needs: learning, behaviour, disabilities, medical. Challenging group?)
- **Environment** (Venue, accommodation, weather, water levels, crowds, other users, culture)
- **Distance** (Including transport arrangements, support systems, residential visits, visits abroad)

It is recognised that plans can vary therefore it may be necessary to make changes to plans. Visit leaders, EVCs and Heads/Managers often find it helpful to have 'a starting point for consideration'. Where departure from the starting point results in fewer staff, the justification should be recorded as a note on EVOLVE.

In the case of young people with SEN advice about higher levels of supervision may need to be sought from the SENCO/ EVC or EVO.

Refer to OEAP documents:

- **Ratios and effective supervision**
- **Underpinning Legal Framework and Duty of Care**

Staff that are assigned to support the special needs of an individual, cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits, as there may be a conflict of responsibility in respect of their child. All accompanying adults/ additional attendees should be listed on Evolve with a role/ purpose on the trip; there may be implications regarding overall ratios, please contact the LA to discuss.

Staff and volunteers who work *frequently* or *intensively* with, or have regular access to young people or vulnerable adults, must undergo a DBS check as part of their recruitment process. For the purpose of this guidance:

- *'frequently'* is defined as 'once a week or more'
- *'intensively'* is defined as 'four or more days in a month, or overnight'

Where remote supervision is used the group must be trained and competent to undertake the route safely, they must be aware of the route and have completed route cards (copies to be left at base). Each young person must have written instructions setting out emergency procedures and be aware of who holds first aid/ emergency equipment and know what to do in the event of an accident.

Refer to OEAP documents:

- **Group management and supervision**
- **Vetting and CRB Checks**

## 8.4 Parental Consent

Where a visit is part of a planned curriculum in normal curriculum time, then parental consent is not necessary although it is recommended good practice to ensure that parents are informed. To help reduce paperwork, comply with best practice and maintain parental confidence we strongly recommend that establishments adopt the following criteria:

- **Regular, routine off-site visits/activities in normal curriculum/programme time**  
Regular, routine off-site visits/activities in normal curriculum/programme time do not require parental consent, however, most schools continue to seek blanket/termly consent for Category A visits (regular, routine off-site visits/activities).
- **Regular, routine off-site visits/activities out of normal curriculum/programme time**  
Consent is required where Category A visits take place out of normal curriculum/programme time. It is recommended that individual visit consent is obtained depending on the nature of the visit and the procedures outlined in the establishment's visits policy.
- **Other visits**  
For other visits (including residential, adventurous, those involving significant distance from base and activities for which a charge is made) consent should be obtained on an individual visit basis. Information provided to parents prior to granting consent should include full details of the activities and any other significant information.

- **All visits - establishments should send parents information about each visit or activity before it takes place.** This may be a useful opportunity to remind them if they have given consent and to give them an opportunity to withdraw it.

All establishments must have systems in place to gather and update any relevant personal, medical and emergency contact details. Such systems should be separate from blanket consent forms as such information is likely to change and need updating over time. Any such information that is relevant to visits/activities must be made available to visit leaders. Relevant information may still be requested on one-off consent forms to ensure that visit leaders have up to date information.

Refer to OEAP document:

- **Consent**

## **9 Charging**

Establishments should familiarise themselves with the latest DfE Advice regarding charging for educational visits. DfE advice states that establishments must not charge for:

- Education provided during school hours
- Education provided outside school hours if it is part of the National Curriculum/syllabus for a prescribed examination/part of religious education
- Transport provided in connection with any educational visit of this type

The DfE advice can be viewed at:

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/706830/Charging\\_for\\_school\\_activities.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/706830/Charging_for_school_activities.pdf)

Each establishment should have their own charging policy in place, which details what they may or may not charge parents/carers for. Restrictions on charging do not prohibit establishments from seeking voluntary contributions in support of a trip or activity, but it must be made clear to parents that there is no obligation to contribute and students must not be treated differently according to whether or not their parents have made a contribution.

## **10 What information is required and how to manage it**

NLC establishments must use the EVOLVE System to record visits and visit planning. This should be detailed in the establishment's Off-site Visits Policy. Systems should also be manageable and proportionate. (See section 5 – Reducing bureaucracy)

An adequate risk assessment must be in place for all visits and adventurous activities. Planning and recording for visits and adventurous activities should be proportionate to the level of risk involved. Local, routine, low risk visits are likely to require minimal planning whereas an expedition abroad will need considerable and detailed planning over an extended period of time.

See sections on:

- **Risk management**

### **10.1 Category A Visits - Information required and how to manage it**

It is recommended that category A visits (local, routine, low risk) are managed in the following way:

- All category A visits must be entered onto EVOLVE
- One-off 'annual consent' or 'regular/routine consent' – ensuring that parental consent is in place for category A visits

- Generic risk assessments/ standard operating procedures (included within establishments Off-site Visits Policy and uploaded on to EVOLVE or attached to the visit form)
- Event-specific Risk Assessments may be required to record any additional significant issues (e.g. relating to variables such as the group or the weather). These can be attached to the visit form with any supporting documents e.g. medical register/ letter to parents.
- Visit Leader holds the following:
  - List of staff and young people on visit
  - 24hr Emergency Contact details
  - First Aid kit
  - Visit leader emergency action card
  - Any other relevant documentation/items (e.g. medication/ contact details where appropriate)
- Emergency contact (at the base) holds the following:
  - List of staff and young people on visit
  - Visit Leader contact details while on the visit
  - Base contact emergency action card
  - Any other relevant documentation (e.g. medical/ contact details where appropriate)

All the relevant information must be held on EVOLVE. This may be done in one of the following ways:

- Entering the information on the EVOLVE Visit Form
- Adding a note to the EVOLVE Visit Form
- Attaching documents to the EVOLVE Visit Form

## **10.2 Category B Visits - Information required and how to manage it**

All Category B visits must be entered on EVOLVE.

Please note that the questionnaire completed when adding a visit on the EVOLVE website and the associated one page summary that is seen when a visit is viewed on EVOLVE are referred to as the 'Visit Form'.

For category B visits all relevant documentation should be recorded electronically and attached to the associated EVOLVE Visit Form. All of the documentation will be retained on EVOLVE for the required period of time. Establishments should review their procedures in the light of the updated guidance and, in the interests of reducing paper work, any duplication should be avoided.

All relevant information must be included. The following (where applicable) must be attached to the EVOLVE Visit Form:

- Itinerary
- Generic Risk Assessment
- Event-specific Risk Assessment/s (as required)
- Information provided to parents/pupils (permission letters/information leaflet/evenings)
- Completed provider form EV1(as required) with certificate of provider's PL insurance (see section 23)
- Medical needs/ SEN register
- Any other relevant information

In addition:

- Group list, First Aid kit, visit leader emergency action card and mobile phone must be taken on every visit along with medical information and contact details where appropriate.
- The Emergency Contact back at base should hold a Group list including all contact details, the base contact emergency action card and have 24/7 access to all Visit details and documentation.

## **11 Retention of documents**

Due to the time limits on civil claims of negligence, records of an accident should be retained until the young person reaches 25 years of age. In the case of an adult, documents should be retained for 7 years following the accident. The EVOLVE website fulfils these retention requirements. School held records must meet the same retention requirements.

Consent /medical/emergency contact forms should be shredded after the visit unless there has been an incident on the visit, in which case the forms for the whole group are subject to the same retention requirements as the planning documentation.

## **12 GDPR**

Any records containing personal details must be processed in compliance with the Data Protection 1998 and the EU General Data Protection Regulation (GDPR). When personal data (such as medical information) are taken on a visit, they must be kept secure irrespective of how the data is shared or carried.

## **13 Safety during the visit**

All Risks will be minimised if due attention is paid to planning, preparation and supervision. The Risk Assessments carried out in the planning stages will help identify issues that may need attention, along with ongoing risk assessments taking place on the visit.

Prior to the visit, staff must ensure that all participants understand what is expected of them. This includes any 'rules' that will be in place. These should be re-emphasised as appropriate during the visit.

Monitoring of the visit must be on-going, and this contributes towards both enjoyment and safety.

It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (e.g. Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

Following the visit, the visit leader should record any issues as a note on EVOLVE, for both reference and to inform future visits. Any significant issues should be reported directly to the provider and reported to the EVO at the earliest convenience. For further information on safety see the following documents:

- **Visit or Activity Leader Responsibilities**
- **Visit Leader Checklist**
- **Good Practice Basics**
- **Planning basics**

## **14 Waivers and Disclaimers**

These documents should **not** be signed by staff upon request by activity providers. If staff are requested to complete a waiver or disclaimer please forward a copy to the LA. NLC Insurance will be asked to comment on the content and advise whether or not they should be signed. Please note that an Acceptance of Risk is a different document; please contact the LA for further information.

## **15 Risk Management**

### **15.1 Risk management - what is required?**

Employers have a legal duty to manage risk and ensure that proportionate (suitable and sufficient) risk management systems are in place. Staff should have access to appropriate guidance, training and resources specific to the risk management of off-site visits.

Carrying out a 'pre-visit' during the risk benefit assessment period will allow time to evaluate the risks and determine the suitability of the venue. This is also an opportunity to discuss details with the provider.

An adequate risk assessment is required which identifies any significant risks and the control measures required to reduce these risks to an acceptable level. All risks do not need to be eliminated; indeed low level residual risks are to be expected. Exposure to well managed risk helps children and young people learn important life skills including how to manage risk for themselves. This is endorsed by HSE in 'Principles of Sensible Risk Management'.

It is not always necessary to produce a separate risk assessment for every visit. It is likely that routine, low risk visits will be covered by the LA's generic risk assessment templates, once amended & adapted for your school, whereas more complex visits will require an additional event-specific risk assessment. Additional consideration will need to be given to all of the factors for any participant identified as having SEN; an additional risk assessment may be required.

Risk assessments should be:

- Proportionate to the complexity of the visit and the level of risk
- Focused on significant risks
- Carried out by the staff team involved in the visit
- Shared - Relevant information should be shared with those involved, including young people
- Reviewed annually (or after an incident)
- Recorded – the format should be consistent across the establishment

Risk assessments must be carried out for all aspects of each visit; these should be comprehensive but not complex. The starting point of any risk assessment should be the consideration of the benefits and learning outcomes of the visit/ activity. It is important to ensure there is a sensible balance between the benefits and any risks involved.

### **15.2 Three Types of Risk Assessment**

#### **Generic Risk Assessment**

Risk Assessments have been developed between the LA and schools over a number of years, these generic templates should be adapted to suit particular circumstances & attached to the EVOLVE visit form. It is likely that for many Category A Visits the establishment's Generic Risk Assessments will be sufficient, providing there are no additional needs/risks that need to be considered.

#### **Specific Risk Assessment**

This considers any additional significant issues that are not covered by the Generic Risk Assessment. E.g. SEN, Medical conditions that may require additional support, Adventurous Activities not covered by the providers Risk Assessment.

#### **On-going Risk Assessment**

This is what the staff do on a visit to keep the group safe – '*active risk management*'. It involves continuously assessing situations as they unfold and adjusting your response to effectively manage any

issues/risks that may arise. This is not a written risk assessment, although it may indicate that risk assessments need amending in light of certain events. All staff are responsible for carrying out effective on-going risk assessments based on competence, experience and common sense. Staff teams must be suitably competent and experienced so they are able to effectively manage any situation they are likely to encounter on the visit. (This indicates the importance of shared knowledge between all staff/ who will do what?)

### **15.3 Making effective use of risk assessments**

NLC generic risk assessment templates are available on EVOLVE, these are to be used as a starting point, to be amended/ adapted to the particular activity or event. All staff should be familiar with these and their Establishment's Off-site Visits Policy.

#### **Category A Visits**

It is expected that category A visits will be managed using NLC's generic risk assessment which should be included on the EVOLVE visit form. There are occasions where a specific risk assessment may be required alongside for visits where there are additional significant issues to consider, or where the visit is being undertaken for the first time. Additional factors may be; a group with unusually challenging behaviour; extreme weather; an inexperienced leader; an event-specific risk assessment may be required to cover any additional issues

#### **Category B Visits**

For more complex visits (category B) a generic risk assessment from the establishment or the Local Authority may be used as a starting point/prompt sheet with any additional, significant issues specific to the visit being recorded along with control measures on the event-specific risk assessment. There is no need to repeat any issues already covered adequately on the generic risk assessment.

### **15.4 Risk assessment forms**

It is recommended that the NLC Risk Assessment form (GRA01) is used for recording risk assessments for Off-site Visits. Where alternative formats are used establishments should review them to ensure that they are fit for purpose, simple and easy to use. There is no requirement to record risk assessments in a particular format, however, each establishment should have a set format which is used for all Off-site Visits. This makes it much easier to share risk assessments with staff and also makes it much easier for the EVC and the Head/Manager to monitor visit planning. (See Appendix B – GRA01)

### **15.5 External Provider Risk Assessments**

The visit leader should ensure that all aspects of the visit which are the responsibility of our staff have been assessed and managed appropriately. Those aspects that are the responsibility of an external provider should be risk assessed by the provider. When considering whether there are any significant risks that need managing it is recommended that staff use the following model:

#### **STAGED:**

<b>Staffing</b>	(Including competence, experience, ratios, effective supervision)
<b>Timings</b>	(Timings, itinerary, downtime)
<b>Activities</b>	(Programme, activities to be undertaken. Who will lead? Adventurous?)
<b>Group</b>	(Additional needs: learning, behaviour, disabilities, medical. Challenging group?)
<b>Environment</b>	(Venue, accommodation, weather, water levels, crowds, other users, culture)
<b>Distance from base</b>	(Including transport arrangements, support systems, residential visits, visits abroad)

Using these variables will enable staff to manage the risks sensibly and get the best experience for the group.

## **15.6 Reviewing risk assessments**

Risk assessments should be reviewed and updated in response to any issues that may arise. Where there have been no issues reported, risk assessments should be reviewed on an annual basis with the review date recorded. Any lessons learned should inform future planning across the establishment. Systems should be in place for sharing any relevant information with colleagues and with the Local Authority where appropriate so that colleagues from other establishments can also benefit. This can be done through the EVOLVE system or by contacting the EVO.

## **15.7 Risk management checklist for EVCs and Heads/Managers**

- Are all staff given training on risk management and risk assessment for Off-site visits?
- Is such training kept up to date (and included in the school induction programme)?
- Is Off-site visit planning, including risk assessments, monitored by the EVC and Head/Manager with appropriate rigour?
- Is there a requirement that the visit leader involves other staff (and young people where appropriate) in the planning and preparation of the visit, including the risk management and the recording of risk-benefit assessments?
- Is there a standardised format for recording risk assessments?
- Are staff encouraged to only record significant risks? (Avoid eliminating low-level residual risks that may provide children/young people the opportunity to learn life skills.)
- Are risk assessments proportionate, up to date, simple and easy to use?
- Is the bureaucracy minimised by having generic risk assessments in place which are included in the Establishment Visits Policy as well as making good use of any exemplar risk assessments?
- Are all adults and young people briefed regarding the risk management plan prior to the visit taking place?

For further information on Risk Assessments and Risk Management see the following documents:

- **Risk Management**
- **Principles of Sensible Risk Management (HSE)**

## **16 Plan B**

Alternative arrangements (Plan B) should be included within the planning process where appropriate, for example, where weather conditions or water levels might be critical, or where an overcrowded venue might necessitate an alternative option. Your provider/venue may be able to support the group in the case of bad weather, check with provider during the planning stage/ preliminary visit.

## **17 Emergency & Critical incident Procedures**

All risks will be minimised if due attention is paid to planning, preparation and supervision. Risk Assessments carried out in the planning stages will help identify issues that may need attention, along with ongoing risk assessments taking place on the visit. If abroad know where and how to contact the local emergency services & the British embassy/ consulate. (Further details available at: [www.british-consulate.org](http://www.british-consulate.org).)

All establishments should have an agreed emergency action plan, this should be comprehensive, detailing the roles & responsibilities required to respond to an incident. It should explain the roles to be filled rather than assigning named staff to the role, guidance for each role should allow any suitable staff to pick up the task and be effective. The plan should include the 24-hour base contact details, lines of communication to be used (i.e.

mobile telephones carried by staff) how to manage the media, parent support, arranging transport etc. These details are explained in the *NLC Educational and Off-Site Visits Emergency Plan*.

All relevant emergency drills should be practiced (fire, evacuation etc.) Safety issues must be discussed with all supervisors, and arrangements explained to pupils. Staff involved in a visit must be aware of and adhere to their establishment's policy on emergency procedures. Visit Leaders should hold, or ensure other members of staff hold, up to date competence in first aid and other lifesaving competencies relevant to the activity. A stocked first aid kit should also be carried.

The emergency/incident plan should include contact details for all of the people who may be needed when a situation arises. NLC contact details can be found below; these are also available on page 5 of this document.

**Primarily please call [01724 297022](tel:01724 297022) (During office hours)  
If unavailable please call [01724 276444](tel:01724 276444) (24 hour call centre)**

Staff involved in a visit must be aware of and adhere to their establishment's policy on emergency procedures and follow the action card relevant to their role. The LA Educational Visits emergency plan will provide support re; Media interest, Insurance, family/community support, returning the group to base and dispatching a travelling team if necessary.

Please familiarise yourself with 'Off-site visit emergencies: The establishment role' which can be found by accessing the OEAPNG website. This guidance covers key points such as:

- Deciding when to activate the critical incident plan
- Developing an off site visits emergency plan for your establishment
- Ensuring that the plan is understood by all involved and that a member of staff is nominated to regularly review/ update details
- Media management
- Responding to a critical incident

## **18 Evaluating visits**

Visits should be evaluated with the outcomes informing future planning. All stakeholders should be considered when carrying out evaluations. There is the opportunity to use the evaluation tool on EVOLVE which enables staff to comment on the learning outcomes identified on the EVOLVE visit form.

## **19 Pre-visits**

A pre-visit is recommended wherever possible and in some instances may be considered essential. Where a pre-visit is not practicable it may still be possible to manage visits effectively. It may also be acceptable to manage visits without a pre-visit if a Tour Operator is providing a guide or has someone in place who can offer support, advice and local knowledge.

A pre-visit can promote the provision of a high quality learning experience allowing staff to focus on the young people and their learning rather than having to focus on issues such as where to cross the road or where to eat lunch if it's raining.

By gathering information and seeing things on the ground, a pre-visit can help to ensure that factors such as the venue, activity and the provider are appropriate and that the provision meets the needs of the group.

## **20 Choosing an External Provider/ Tour Operator**

When choosing a new provider first-hand experience or word of mouth is often the best approach, information can also be sought from websites such as Kaddi/ provider leaflets/ liaising with other establishments or staff may wish to contact the Educational Visits Officer for advice. As a minimum, providers should hold £5M public liability insurance; where providers are leading an 'adventurous activity' they must hold £10M public liability (See section 23 – Insurance).

An 'External Provider' is defined as where there is an element of instruction, staffing, or guiding, for example:

- Activity Centre
- Ski Company
- Educational Tour Operator
- Overseas Expedition Provider
- Climbing Wall where instruction is provided by climbing wall staff
- Freelance instructor of adventurous activities
- Youth Hostel (where instruction is provided)
- Voluntary organisation (e.g. Scout Association), where instruction is provided

For the purposes of LA approval, an External Provider is NOT a:

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc.
- Campsite
- Museums, galleries, etc.
- Tourist attractions
- Theme Parks
- Farms
- Coach, Train, or Airline company
- Swimming Pool
- Climbing Wall where instruction is provided by a member of your establishment's own establishment staff with an approved Activity Leader Form (ALF) (adventurous)
- 'Volunteer' instructor of adventurous activities (Contact LA)

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Head of establishment. The LA does not 'approve' external providers or tour operators, although we recommend the use of ABTA/ ATOL registered travel agents. Establishments may find it useful to 'Search by External Provider' on EVOLVE, and liaise with other LA establishments that have used a particular provider. Establishments should consider the requirements under 'best value' when selecting an external provider. Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

**To confirm that all aspects of the operation of the external provider are satisfactory, the establishment must ensure that either:**

- a) The Provider holds an LOtC Quality Badge; search for badge holders at [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)  
**or**
- b) An external Provider Form (EV1) has been satisfactorily completed by the provider

Note: If a Provider holds an **AALA licence** (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

## **21 Learning Outside the Classroom (LOtC) Quality Badge**

Where possible providers holding the LOtC Quality Badge should be used. Selecting a badged provider should ensure good quality provision and good safety management systems. Details of the badge and a list of holders can be found at [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk).

Where providers do not hold the LOtC quality badge, the External Provider Form (EV1) should be sent to the provider at the time of making a provisional booking, no deposits should be committed prior to its satisfactory completion and return. The Establishment should complete the top of the form and send the form to the provider for completion. The satisfactory completion of a Provider Form does not necessarily signify that the service on offer will be appropriate for the young people from your establishment. A pre-visit and recommendation from previous users will help you decide on its suitability. Staff should also request a copy of the provider's Public Liability (PL) insurance certificate, providers that offer 'adventurous activities' must hold a minimum of £10M PL insurance.

The above procedure is **not** sufficient for Overseas Expeditions (i.e. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and **must** be complied with. (See section 29.5 Overseas Expeditions).

## **22 Inclusion**

Under the Equality Act 2010, it is unlawful to discriminate against participants because of one or more of their protected characteristics, without material or substantial justification. You are required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Disability Discrimination Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

The following factors need to be taken into account:

- Is the pupil capable of taking part in, and benefitting from, the activity?
- Can the activity be adapted to enable to pupil to participate at an appropriate level?
- Will additional, or different, resources be necessary?
- Is the pupil able to understand and follow instructions?
- Will additional supervision be necessary?
- Are there higher or additional safety risks that cannot be managed to a reasonable level?

Refer to OEAP documents:

- **Inclusion**
- **Special Educational Needs and Disabilities**

## **23 Transport**

### **General considerations and effective supervision during journeys**

The visit leader must give careful thought to planning transport and care should be taken to assess the maturity and the needs of the group, the competence and experience of the staff, as well as the distance from base. This will ensure that the Visit Leader, EVC and Head/Manager are confident that 'effective supervision' is in place.

Refer to OEAP documents:

- **Transport General Considerations**
- **Transport in minibuses**
- **Transport in private cars**
- **Supervising passengers - minibuses and cars FAQs**

### **23.1 Seat belts and child restraints**

Seat belts must be worn at all times on all vehicles where seat belts would normally be expected, including cars, minibuses, coaches and buses – with the exception of public transport. Establishments should only commission vehicles with appropriate seat belts fitted. The use of child restraints varies depending on the vehicle being used. Please check the latest government guidance –

[www.gov.uk/child-car-seats-the-rules/when-a-child-can-travel-without-a-car-seat](http://www.gov.uk/child-car-seats-the-rules/when-a-child-can-travel-without-a-car-seat)

[www.gov.uk/seat-belts-law](http://www.gov.uk/seat-belts-law)

[www.gov.uk/browse/driving/highway-code-road-safety](http://www.gov.uk/browse/driving/highway-code-road-safety)

### **23.2 Minibuses**

NLC requires that all drivers of minibuses successfully complete training recognised by the Local Authority such as MIDAS with training being kept up to date. Establishments should consider staff maturity/age and any penalty points held before allowing staff to drive the minibus. It is important that drivers also take into consideration the weight of the vehicle, whether the establishment requires a section 19 permit and that the driver either holds a D1 category license or have undergone an additional test to obtain this. For more information please contact the LA.

#### ***Legal Requirements and Supervision***

It is the driver's responsibility to ensure that all relevant legal requirements are met for the vehicle they are driving and that appropriate supervision is in place. The level of supervision should be considered as part of the risk assessment for the journey; the driver should not normally be responsible for supervising the group. It is also the establishment's responsibility as the operator to ensure that all legal requirements are met. Passengers must not obstruct any entrance, exit or gangway & must not distract the driver. For longer journeys it may be necessary to consider whether a second driver is required.

Refer to OEAP document:

- **Transport in minibuses**

#### ***Minibus Policy***

Establishments that own or hire a minibus must have a minibus policy in place that covers:

- roles and responsibilities
- driver requirements
- insurance
- accident/ breakdown procedures
- emergency procedures
- maintenance schedules
- supervision
- operational procedures.
- Section 19 permits

#### ***Driving on a voluntary basis***

Please note that NLC considers staff who agree to drive a minibus during the course of their duties (eg school staff either in or out of school time) are doing so on a voluntary basis unless driving duties are included in their job description or they can be compelled to drive by their employer.

## ***Further Information***

GOV.uk information: **Driving a minibus**

DVLA information leaflet: **DfT/ DVLA Driving a minibus (INF28)**

ROSPA document: **ROSPA Minibus Safety: A Code of Practice**

Useful website: **Community Transport Association UK ([www.ctauk.org](http://www.ctauk.org))**

### **23.3 Coaches/ minibuses with drivers**

NLC schools transport check documentation for a number of providers of home to school transport. These providers will have the message “checked by NLC transport – no action required” appear when input in EVOLVE. For other providers, it is the establishment’s responsibility to ensure that only reputable companies are used and that the vehicles provided appear to be in good order and fit for purpose. Drivers should be competent with DBS checks in place. This is especially important on residential visits when the driver stays with the group.

Refer to OEAP document:

- **Transport General Considerations**

### **23.4 Buses – private hire**

Buses (e.g. double/single decker buses) should be avoided where possible and if used then they should be fitted with seat belts and only used for short, local, urban journeys where speed limits are low. They are **not** suitable for longer journeys or where motorways or faster roads are used.

Staff should also consider the age/ size of the children and young people. Smaller children (e.g. Early Years and Infants in particular) may have faces level with the metal bar/handrail on the back of the seat in front which if lap belts are fitted may present serious issues in the event of an emergency stop or accident.

### **23.5 Public transport**

Public transport can reduce the cost of visits. It can also be a learning experience in itself, especially where young people are involved in planning the journey themselves.

When planning to use public transport staff should contact the company involved to pre-book tickets or if no tickets are needed (e.g. on a bus) to ensure that the transport provider is happy with the intended arrangements and the numbers traveling in the group.

Staff/ pupil ratios may need considering when using public transport to ensure that effective supervision is maintained at all times. A higher staff ratio may be required to manage this mode of transport.

A pre-visit would normally be expected so that the visit leader is familiar with the route and where to get on and off.

Refer to OEAP document:

- **Transport General Considerations**

### **23.6 Use of Private Cars by staff members**

When transporting young people in private cars there are a number of things to take into consideration, including:

The driver must complete a driver declaration form and have a full licence with no more than 3 penalty points. There must be full insurance (including business use) and the vehicle must be well maintained with an up to date MOT. Maximum seating must not be exceeded and appropriate seatbelts/child restraints must be

used, the driver must be aware of their duty of care and ensure that young people are not left unattended in the vehicle. Risk assessments should include consideration on the distance/time of the journey and activity together with the need to supervise students.

It is important that explicit parental consent has been sought to transport young people in this way. Other than in an emergency situation, or where there is a specific job requirement as a day-to-day duty, staff transporting young people should not be put in a position where they are alone with a young person.

We do not recommend that parents/ carers are used to transport other people's children to the visit/ activity, unless this is an independent arrangement.

## **24 First Aid**

**For all visits there should be a responsible adult with a good working knowledge of first aid appropriate to the environment (e.g. urban, remote, water, etc.)**

First aid arrangements for off site visits should simply be an extension of the establishment's risk assessment for first aid provision. Based on the nature of the particular visit, the Visit Leader/EVC/Head should make a professional judgement regarding the level of first aid required. However at all times during a residential visit or adventurous activity, at least one member of the visit team and/ or the activity provider must be a qualified first aider. For residential visits the first aid cover must be available 24/7 and staff must be aware of how to contact the local emergency services.

A first aid kit appropriate to the visit should be carried and there should always be someone who is nominated to deal with first aid issues. All coaches and minibuses are required by law to carry a first aid kit.

All accidents should be recorded (see form EV4 – Accident Record) and reported to relevant staff on the visit and back at base. Near misses should also be recorded to prevent future accidents (see form EV5 – Near Miss record).

Refer to OEAP document:

- **First Aid**

See **DFE publication; Advice on first aid in schools** or **Statutory Framework for the Early Years Foundation Stage** for more information.

## **25 Weather, Clothing & Survival**

Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice. Participants should be adequately clothed appropriate to:

- The time of year, prevailing weather conditions, altitude and exposure to elements
- Likely changes in weather
- The experience and strength of the party
- The nature of the visit and environment

When venturing away from immediate help, leaders should consider the need for:

- Comfort, insulation and shelter for the whole group (including any potential casualties)
- Provision of emergency food and drink
- Torch
- Possible need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas)

It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (e.g. Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

## **26 Insurance**

It is the Head's/Manager's responsibility (on behalf of the employer) to ensure that appropriate insurance cover is in place to cover staff, volunteers and children participating in Educational Visits and any adventurous activities. Establishments will need to check the adequacy of the insurance provided especially where hazardous activities & visits abroad are planned. The relevant types of cover are:-

### **Employer's Liability Insurance**

This policy indemnifies the employer against all claims for compensation for bodily injury suffered by any person employed by it where there is a legal liability. This policy should extend to those persons who are acting in a voluntary capacity.

### **Public Liability Insurance**

This policy indemnifies the employer against all claims for compensation for bodily injury (where there is a legal liability) for persons not in its employ and for the accidental loss of, or damage caused to, property. Employees are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff.

### **Personal Accident Insurance**

Covers employees, volunteers etc. for bodily injury whilst at work arising from an accident or assault, resulting in death or permanent disablement.

### **Combined Personal Accident/Travel Insurance**

Covers personal accident, cancellation & curtailment, personal liability, personal effects & money, medical expenses and repatriation.

### **Tour Operator Insurance Packages**

Not obliged to take out tour operators insurance as part of a package. Particularly check exclusions and limits of indemnity. Check that cover is at least equivalent to that available through employer's standard travel insurance.

## **26.1 Maintained Schools**

For all maintained schools (including those where NLC is not the employer) and NLC services the NLC policy includes provision for the following:-

Employer's Liability Insurance

Public Liability Insurance

Personal Accident Insurance

As an optional extra to the NLC policy schools/services can purchase combined personal accident/travel insurance. This is recommended for travelling abroad and should also be considered for visits that involve a significant financial commitment or complex/high risk elements. Parents should be informed if this cover isn't in place.

## **26.2 Academies**

For **Academies**, the following applies:-

Employer's Liability Insurance – required, employer's policy should be checked to ensure visit is covered

Public Liability Insurance – strongly recommended, employer’s policy should be checked in respect of education visits.

Personal Accident Insurance – need to check employer’s policy and consider the consequences of not having this cover.

Combined Personal Accident/Travel Insurance – recommended for travelling abroad and it should also be considered for visits that involve a significant financial commitment or complex/high risk elements. Parents should be informed if this isn’t in place.

### **26.3 Providers’ Public Liability Insurance**

Providers (individuals or organisations that provide an element of instruction, staffing or guiding) require £5m public liability insurance. Where the visit includes adventurous activities the provider must have £10m public liability insurance. (See section 24 for list of adventurous activities.)

## **27 Adventurous Activities**

Adventurous Activities include activities which are considered to have a higher potential level of risk associated with them and would normally require a specifically competent/ trained/ experienced person to lead the activity (please note that this is not a definitive list). If you are unsure whether or not your activity is adventurous then please contact the EVO for further clarification and advice.

### **Activities regarded as ‘adventurous’ and requiring LA approval include:**

- All activities in ‘open country’
- All other forms of boating (excluding commercial transport)
- Adventurous activity centres
- Activities at water margins (Far Ings Visitor Centre/ fishing)
- Activities with the Armed Forces
- Abseiling
- Air activities (excluding commercial flights)
- Camping
- Canoeing / kayaking
- Coasteering/coastal scrambling/sea level traversing
- Diving
- Duke of Edinburgh Award schemes
- Forest School/ Woodland craft activities
- High level ropes courses/ assault courses
- Horse riding/ Pony Trekking
- Hill walking and Mountaineering/ Open Country walking
- Ice Skating
- Motor sport – all forms
- Off road cycling
- Other activities (e.g. initiative exercises) involving skills inherent in any of the above, where staff and/or young people are considered to be at greater risk than everyday life.
- Paintballing
- Rock climbing (including indoor climbing walls Rafting or improvised rafting)
- River/gorge walking or scrambling
- Swimming (all forms, excluding publicly lifeguarded pools)
- Sailing / windsurfing / kite surfing/ rowing
- Snorkel and aqualung activities
- Shooting and archery
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Underground exploration

- Use of powered safety/rescue craft
- Water skiing

The responsibility for the safety of participants in an adventurous activity will rest with either:

- a) **An external provider** - see section 20 Choosing an External Provider/ Tour Operator  
*or*
- b) **A member of your establishment's staff** - see section 24.1 Approval of establishment staff to lead Adventurous Activities. This person must be specifically approved by the LA to lead the activity, via EVOLVE.

### **27.1 Approval of establishment staff to lead Adventurous Activities**

Staff who wish to **lead** (i.e. supervise or instruct) an adventurous activity, as defined in section 25, must first upload details and scanned copies of all relevant qualifications (e.g. instructor certificates, first aid, etc.) to the 'My Profile' section of their EVOLVE account.

The visit leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (e.g. dates, venues, numbers, etc.). The ALF will then be embedded within the Visit Form for that particular visit. On receipt of a Visit Form (and embedded ALF), the LA will view the proposed activity in the context of the leader's competencies and qualifications.

Where approval is not granted to lead the activity, the Visit Form will be returned to the EVC via EVOLVE, with an attached note. Where this is the case the activity **must not** take place.

Approval will normally be given where the leader of the activity has recent relevant experience, and:

- is appropriately qualified through the relevant National Governing Body, *or*
- has a 'Statement of Competence' from an appropriate 'technical adviser'.

In some cases approval **may** be granted where no qualification is held, but the person concerned is deemed by the LA to have a sufficient level of competence in addition to recent relevant experience.

Adventurous Activities Licensing Authority (AALA) produce a qualification matrix of the qualifications that staff proposing to lead licensable activities must hold, see; **AALA Qualification matrix**

In cases where no National Governing Body exists, the LA will make a decision based on factors which may include: technical advice, the leader's stated competence, observed competence, past experience, and attendance at training courses.

Approval will always be subject to a requirement that the leader must act at all times within the remit of his/her qualifications, and in accordance with National Governing Body Guidelines where these exist. Approval may also be subject to other conditions which will be specified by the LA on the Visit Form.

Where there is insufficient information for the LA to make a decision regarding approval, then the applicant may be asked to provide further information (e.g. evidence of awards, experience, and log book details, etc.). In some cases a meeting with the applicant may be requested by the LA.

## **28 Walking – Adventurous or non-adventurous?**

Walks in parks or on non-remote country paths below 300m are not normally regarded as adventurous and therefore do not require approval by the Local Authority.

### **28.1 Open country activities (when does a simple walk become adventurous?)**

For the purposes of LA approval, 'open-country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the LA if you think this might apply.

Open-country activities are regarded as 'adventurous' and therefore these visits requires LA approval.

There are some issues that need to be covered, such as remote nature of the routes (no ambulance access) and the required level of First Aid. Also the group kit carried by the leader and the possibility of poor weather and poor visibility. Group members clothing and footwear also need considering. Please contact NLC Educational Visits Officer for further details or enter the visit details on EVOLVE as an 'Adventurous' visit led by establishment staff.

Members of staff leading walking groups in fell and mountainous terrain in the UK must have attended Mountain Leader Award (MLA) assessment and be current holders of MLA (summer or winter) or a suitable higher award.

## **28.2 Unaccompanied groups (Remote Supervision)**

For unaccompanied groups i.e. under remote supervision, staff must ensure that all members of the party are trained and competent; all group members must be aware of the route & should have the correct clothing and equipment. Each member of the group should have written instructions, setting out accident procedures, know who holds first aid and emergency equipment and know what to do in the event of an emergency. Group members should not be expected to carry more than they feel comfortable with for the duration of the trip. A group leader should not be responsible for more than 8 young people in this environment.

Refer to OEAP document:

- **Group Management and supervision**

## **29 Swimming**

All swimming activities and venues must be included within the visit plan, and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example, a hotel pool may be available.

Particular consideration should be given to the following factors:

- Unknown locations and hazards, especially overseas.
- Changing environmental conditions.
- Supervisor complacency & lack of transferable knowledge.
- Adherence to local advice.
- Preparation and knowledge of young people, i.e. is it a planned activity?

**Young people must be supervised by a competent adult at all times whilst undertaking swimming activities.**

### **29.1 Swimming pools - lifeguarded (non-adventurous)**

LA Approval is not required but activity must be recorded as a Category A visit on Evolve.

- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.
- For publicly lifeguarded pools abroad, the establishment's staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
- Unless suitably qualified, the establishment's staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.
- For swimming lessons, the LA establishment should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

## 29.2 All other swimming pools – including hotel pools(adventurous)

Establishments should check the lifeguarding position in advance.

LA Approval is not required for this activity if qualified lifeguarding is provided at the pool.

If lifeguarding arrangements are not provided at the pool then the visit leader will bear the full responsibility for ensuring swimming safety, and approval to lead the activity will be required via EVOLVE. (See 25.1 approval of establishment staff to lead adventurous activities.)

The following awards/qualifications apply:

For free swimming activity:

- A valid **RLSS UK National Pool Lifeguard Qualification (NPLQ)**, or equivalent in the country visited

For structured or programmed activity:

- A valid **RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC)** or equivalent.  
*or*
- A valid **RLSS UK Water Safety Management Award (WSMA)**, with appropriate endorsement.

The role of the lifeguard is:

- To directly supervise the pool and the pool users, exercising appropriate levels of control. (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)
- If necessary, brief pool users in advance regarding rules (e.g. no diving, running, etc.)
- To communicate effectively with pool users
- To anticipate problems and prevent accidents
- To intervene to prevent behaviour which is unsafe
- To carry out a rescue from the water
- To give immediate first aid to any casualty

The above must be accomplished in the context of the normal operating procedures and the emergency plan for the pool, which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool.

Staff must be aware of the procedures in the event of an emergency, and who at the venue will provide back up. Staff should also know if they have exclusive use of the pool, as other pool users may increase the supervision role of your lifeguard.

If a young person holds an appropriate qualification then their role should be emergency lifeguard action, and supervision should remain the responsibility of the LA establishment's staff.

## 29.3 Open water swimming e.g. River, lake, sea (adventurous)

LA Approval is required via EVOLVE.

Natural water bathing should always be a robustly planned activity with a fresh look at risk assessing each time it is undertaken. It should never be allowed as an impromptu group activity. The designated lifeguard must be dedicated exclusively to the group, and local advice must always be sought.

For free swimming activity:

- A valid **National Beach Lifeguard Qualification (NBLQ)** or equivalent in the country visited, Note: this is for beach/sea only, not inland water. *or*

For structured or programmed activity:

- A valid **RLSS UK National Rescue Award for Swimming Teachers and Coaches** (NRASTAC) or equivalent
- A valid **RLSS UK Water Safety Management Award (WSMA)**, with appropriate endorsement.

## **30 Activities near or in water**

### **30.1 Water margin activities – activities near/next to water (non-adventurous)**

This section applies to:

**Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow\* water. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment, or water-going craft.**

\* 'shallow' typically means up to the knees of the participants.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

At the outset the establishment must decide whether the activity:

- Falls **within** the definition in bold above - in which case the below guidance applies,
- Exceeds** the definition in bold above - in which case this is a **Water based activities – activities in/on water (adventurous)**.

All staff involved in water-margin activities should be conversant with the guidance contained within **Group Safety at Water Margins** (available on Evolve). This document must be made available to all supervising adults in advance of the visit.

As with all visits, where appropriate there should be an approved alternative 'Plan B' that could be used where conditions dictate (e.g. water levels too high), and for which parental consent has been obtained if necessary. LA approval is not required for water-margin activities, but the leader must have previous relevant experience, and must have been assessed as competent to lead the activity by the EVC and/or Head of Establishment.

### **30.2 Water based activities – activities in/on water (adventurous)**

The following are **not** regarded as adventurous activities for the purposes of LA approval:

- Swimming in publicly lifeguarded pools – see the section on **Swimming pools - lifeguarded (non-adventurous)**
- Water-margin activities as defined in the section - **Water margin activities – activities near/next to water (non-adventurous)**
- Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

With the exception of the above, all other forms of water-based activities are regarded as adventurous activities, and as such require LA approval.

Any establishment staff wishing to lead Water Based activities must be specifically approved by the LA to lead the activity, via EVOLVE/ALF.

In order to participate in water-based activities, participants should normally be water confident (*DFE 2013 – Pupils should be taught to swim competently, confidently and proficiently over a distance of at least 25 meters*). Participants who lack water confidence may still be able to take part subject to consideration of all factors, including the activity itself and supervision arrangements. The level of water confidence of all participants must be known by the activity leader prior to the commencement of water-based activities.

Leaders should have knowledge of the water conditions/hazards (and potential changes) that might be encountered, and prepare accordingly. Local advice must be sought where appropriate, e.g. coastguard, harbour master, other site users, etc.

Personal buoyancy conforming to the appropriate National Governing Body must be worn at all times by all participants in water based activities, except, at the discretion of the activity leader, where the activity:

- takes place in a swimming pool, **or**
- is 'swimming', **or**
- is an activity for which personal buoyancy would not normally be worn by young people.

## **31 Snowsports**

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires LA approval.

### **31.1 Supervision on the slopes**

Young people may only participate in Snowsports when under the direction of a person who is appropriately qualified and competent. This would normally be an instructor employed by the local ski school. Establishments should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.

When considering supervision on the slopes the following points must be taken in to account:

- All participants must receive instruction from qualified instructors. This should be for at least 4 hours a day split between the morning and the afternoon. The instructors must be able to communicate effectively with the group and should have good English.
- Although the instruction will be in the hands of the ski school instructor, the visit leader and the other accompanying staff retain responsibility for monitoring the organisation of the lessons, the quality of instruction and the behaviour and wellbeing of the young people.
- The visit leader or another member of staff on the visit should accompany (ski with) each of the lesson groups. This should include being directly involved in supervising the groups during lunch times/breaks. The visit leader/ EVC and Head should ensure that these staff members are competent skiers.
- Where this is not possible all groups must be effectively monitored on a frequent and regular basis. Where any such alternative arrangements are necessary (except where they are imposed during the visit e.g. due to illness/injury) they should be discussed with the Head and NLC Educational Visits Officer prior to departure.
- Young people must not participate in off-piste activities.
- If there are any problems with lessons or equipment the visit leader or accompanying staff should raise the issue(s) immediately with the instructor, ski school, ski hire shop or tour operator's representative, and report any concerns/issues to LA on return to base.

### **31.2 Helmets**

**All participants including staff must wear a helmet while taking part in Snowsports.** In some countries this is a legal requirement for young people.

### **31.3 Preparation**

A course of ski/snowboard lessons and fitness training is highly recommended prior to the trip, if possible using an indoor snow slope or a dry ski slope. This will help to familiarise the group with the equipment and provide the opportunity to learn some of the basics (or rediscover their ski legs), helping the young people to get the most out of the visit. Good clothing and equipment are fundamental to the safety and enjoyment of a ski course. It is recommended that appropriate spare equipment is carried within each sub-group.

Refer to OEAP document:

- **Snow Sports Visits**

## **32 Other Visits**

### **32.1 Residential Visits**

The LA acknowledges the immense educational benefits that residential visits can potentially bring to children and young people, and fully supports and encourages residential visits that are correctly planned, managed, and conducted.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken. It is essential that young people know where the duty staff are at all times and that all appropriate safety regulations are observed. Fire and emergency procedures for the location must be discussed with the group shortly after arrival. Security of the site should be checked wherever possible on a pre-visit so that it can be included in the risk assessment.

Refer to OEAP document:

- **Residential Visits Mindmap**

### **32.2 Farm Visits**

Before a visit takes place, young people must be briefed about farm hazards in general and specific to the site to be visited. It is important to ensure that all members of the group wear appropriate clothing and footwear. In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

All members of the party must wash their hands thoroughly before handling food and drink and at the conclusion of the visit, before leaving the site. Expectant mothers should not normally be included on farm visits, due to the diseases that farm animals can potentially carry. Parents should be fully informed about the nature of the farm visit to be undertaken.

Refer to Farming & Countryside Education: [www.face-online.org.uk](http://www.face-online.org.uk)

Refer to OEAP document:

- **Farm Visits**

#### **- Horse riding/ Pony Trekking**

These activities carry a range of risks specific to the activity or arising from the environment. Before a commitment is made, visit leaders must be assured that the following criteria are fulfilled. Riding should only be undertaken through a riding school approved by the British Horse Society and/or who are members of the Association of British Riding Schools. Visit leaders must also ensure that all participants wear appropriate clothing and a suitable safety helmet.

### **32.3 Duke of Edinburgh (DofE) Expeditions and Training**

DofE training and expeditions must be entered on EVOLVE like any other visit. On EVOLVE they must be categorised as 'Adventurous led by establishment staff' and will require approval by the Local Authority. (See Staffing, ratios, effective supervision and Remote Supervision and section 25.1 approval of establishment staff to lead adventurous activities).

Refer to OEAP document:

- **DofE Award expeditions**

### **32.4 Overseas visits**

The LA acknowledges the immense educational benefits that overseas visits can potentially bring to young people, and fully supports and encourages overseas visits that are correctly planned, managed, and conducted. Group members should be advised about the dangers of over exertion in the heat and hydration. In warm climates it is important to keep fluid levels high. Parents should be requested to provide suitably factored sun protection creams/ sun hats and glasses.

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken. Establishments arranging to take a group overseas must ensure that appropriate immunisation and vaccination procedures have been carried out (where necessary). Visit leaders should be aware that some diseases are more prevalent in some countries than others.

It is good practice that an explanatory visit to the location should be made. Staffing ratios for visits abroad are difficult to prescribe, as they will vary according to the activity, student's age group and location.

**For all visits** it is essential that consideration is given to the following:

- Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- Transport systems have been assessed as safe for use.
- Medical facilities/ emergencies: Check the location of nearby medical support/ hospitals, European health insurance card (E111). Also consider that proof of parental consent may be requested by medical professionals prior to carrying out treatment.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: **[www.fco.gov.uk](http://www.fco.gov.uk)**. All relevant FCO information should be circulated amongst the staff team.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See **[www.dh.gov.uk](http://www.dh.gov.uk)**

Refer to OEAP document:

- **Overseas visits**

### **32.5 Overseas Expeditions**

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

In addition to considering the benefits of the activity, staff should also ensure that reasonably practicable safety precautions are taken.

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

There are stringent requirements on Overseas Expedition providers, and establishments may therefore need to allow up to 18 months for LA approval to be granted. A 'Note' (for the attention of the LA) should be added to the EVOLVE visit form as soon as possible during the planning stages.

Overseas Expeditions will only be approved by the local authority if the provider either:

- a) Holds an LOTC Quality Badge **[www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)** *or*

- b) Provides a statement of compliance with **Guidance for Overseas Expeditions, Edition 4**.

For providers that do not hold an LOtC Quality Badge, 'Guidance for Overseas Expeditions, Edition 4' should be referred to when the proposal is initiated. This document contains information for both establishments and providers, and includes a checklist of vital aspects that **must** be considered prior to the establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

When planning an expedition and selecting a provider, establishments should particularly consider the educational aims of the venture, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met.

Visit leaders may find it beneficial to attend the one day course entitled 'Overseas Expeditions and Fieldwork: a Course for Teachers and Youth Leaders' organised by the Royal Geographical Society [www.rgs.org/eac](http://www.rgs.org/eac)

Please ensure that the following OEAP documents are also used by all staff planning overseas expeditions:

- **Overseas Expeditions**
- **Overseas Expeditions - Mindmap**

### **32.6 Exchange Visits**

Staying with a host family gives young people both the insight into the culture and a first-hand opportunity to use their language skills in a real context. The success of an exchange visit largely depends on good relations and communications with the partner school. School exchanges differ from other visits abroad in that students will spend most of their time with host families and are therefore, not always under the direct supervision of school staff. Therefore, homestays require careful planning to ensure everyone involved is clear about both their responsibilities and the supervision arrangements. Young people must be appropriately supervised throughout and parents must be able to give, or withhold, consent based on a clear understanding of how the visit will be managed. Visit leaders should ensure that parents understand that an equivalent to DBS checks is likely to be unavailable in countries visited by young people from the UK. It is therefore critical that visit leaders ensure that the overseas host school, or agency, has a vetting procedure in place to assess the suitability of home placements.

Refer to OEAP document:

- **Vetting and DBS checks.**

Home stays may also take place between host families in the UK to provide young people with accommodation during a visit. Where an exchange visit is arranged for the first time, or involves a significant number of new staff, a preliminary visit is recommended.

#### **For exchange visits:**

- Students should be aware of the ground rules agreed between the party leader and host family.
- The LA has adopted the Outdoor Education Advisers' Panel guidance document: **Young People's Exchange Visits** LA establishments are required to adhere to all relevant aspects of this guidance.
- Refer to the British Council (Learning) [www.britishcouncil.org](http://www.britishcouncil.org)

Refer to OEAP document:

- **Exchanges & home-stays**

### **32.7 High level ropes courses/assault courses**

High level ropes courses are classed as a category B visit and therefore require LA approval. Courses must be inspected by European Ropes Course Association (ERCA) certified inspectors. Participants should be briefed about their own and the group's safety, they should comply with all safety instructions at all times. Ratios of instructors to participants need careful consideration. The LA will only approve visits where participants will be connected to the safety line at all times or where trained provider staff are 'aloft' with the group to supervise participants during the use of interlocking devices.

### **32.8 Paintballing**

Paintballing is classed as a category B visit and therefore requires LA approval. In order for paintballing to take place the visit leader must be sure that the site is a fully accredited UKPSF or UKPBA member, they must also comply with the specific code of conduct. The LA will only approve low impact games where students will be wearing full head protection/ masks.

### **32.9 Forest School/ Woodland Craft Activities**

In order for school staff to lead forest school/ Woodland Craft activities, they must be qualified to Level 3 forest school programme leader or Level 3 Bushcraft Award and complete the relevant risk assessments/ handbook; training should include an element of outdoor first aid and food hygiene for cooking on the camp fire. Staff are required to complete a Leader approval request (LAR) on Evolve and include copies of their qualifications before approval will be granted. See section 24.1 - Approval of establishment staff to lead Adventurous Activities. Staff completing pilot schemes must be accompanied by level 3 trained staff.

## **Appendix A - Summary of documents used.**

### **National Guidance documents:**

Assistant leader responsibilities  
Consent  
Duke of Edinburgh award expeditions (D of E)  
EVC checklist  
Exchanges and homestays  
Farm visits  
First aid  
Good practice basics (OEAP)  
Group management and supervision  
Guidance for those in a position of parental authority  
Head or managers checklist  
Head teacher responsibilities  
Inclusion  
Learning outcomes mind map  
Management board and governor checklist  
Member of a management board or governing body responsibilities  
Monitoring  
Overseas expeditions  
Overseas visits  
Planning basics (OEAP)  
Ratios and effective supervision (OEAP)  
Requirements and recommendations for employers  
Requirements and recommendations for establishments  
Residential visits mind map  
Rigorous evaluation of LOTC meeting Ofsted expectations  
Risk management (OEAP)  
Snow sports visits  
Special educational needs and disabilities  
Supervising passengers – minibuses and cars FAQs  
Transport general considerations  
Transport in minibuses  
Transport in private cars  
Underpinning legal framework and duty of care  
Vetting and DBS  
Visit leader checklist (OEPA)  
What information is required and how to manage it

### **Other documents and websites**

Health and safety at work Act 1974  
Department for Education: Advice on health and safety in schools (Feb 2014)  
Statutory framework for the early year's foundation stage  
Learning Outside the Classroom quality badge (LOtC)  
Adventurous Activities licensing Authority (AALA)  
Driver & Vehicle Licensing Authority (DVLA): Quick guide to driving a minibus INF241  
Department for Transport/ Driver & Vehicle Licensing Authority: Driving a minibus INF28  
ROSPA minibus safety: A code of practice 2008  
Principles of sensible risk management (HSE)  
Community transport association UK  
Mountain Leader Training (MLT) awards  
[www.lifesavers.org.uk](http://www.lifesavers.org.uk) – RLSS UK national pool lifeguard qualification

[www.snowsportengland.org.uk](http://www.snowsportengland.org.uk)  
[www.face-online.org.uk](http://www.face-online.org.uk)  
Guidance for overseas expeditions edition 3 (GOE3)  
[www.rgs.org/eac](http://www.rgs.org/eac)  
[www.britishcouncil.org](http://www.britishcouncil.org)

## **Appendix B - NLC Educational Visits risk assessment guidance**

### **Introduction**

The purpose of a risk assessment is to identify hazards and evaluate any associated risks to health and safety arising from the activities. This enables informed decisions to be made to eliminate or minimise the risk of harm to those who may be affected.

The Health and safety at work etc. Act 1974 places responsibilities on the employer to ensure, so far as reasonably practicable, the health, safety and welfare of their employees to others affected by their activities. The management of Health and Safety Work regulations 1999 requires that risk assessments be carried out. Employer responsibilities for risk assessment include identifying the different risks and how these could harm people, and then implementing control measures to reduce these risks. **Risk assessments do not have to be complicated and the level of detail will be proportionate to the risk of the activity.**

The Health and Safety Executive (HSE) promote a five-step approach to risk assessment and this guidance document aims to explain a little more about using this approach to identify hazards and risks, what the different terms mean and how to calculate a risk rating for your activities.

**Ed Visit Leader will:** Undertake risk assessments, identify and implement control measures and effectively communicate the outcomes of risk assessments to the visit leadership team and others as appropriate. Develop and produce safe systems of work identified as part of the risk assessment process and ensure these are effectively communicated to the leadership team and students.

**Visit leadership team will:** Assist with and participate in the process of risk assessment.

### **Risk Assessing – what we need to do**

A risk assessment should be completed by someone who is competent to do so to ensure it is suitable and sufficient; a manager or supervisor would usually do this with input from employees, and review it regularly to ensure it is still relevant.

Work related activities must be assessed and significant risks identified. Suitable control measures must then be put in place to manage and control risk. Any risks remaining should be managed so they are of an acceptable level.

### **Hazard**

A hazard is anything that has the potential to cause harm, in some circumstances even people can create a hazard by their behaviour or other things they do.

### **Risk**

A risk is the likelihood and severity of harm that could be caused by a particular hazard. Risks can be calculated in several ways; they can be classed as high, medium or low level or they can be given a score to help determine the level. The standard template uses a rating calculation to score risks. The way to calculate the risks are given on each blank risk assessment template as a reminder and are also shown on the next page.

Potential Severity Rating (PSR)

PSR	Severity	Guidance
4	Major	Death to one or more people, permanent or life changing disability
3	High	Chronic or terminal occupational disease, physical assault, damage to property, significant financial loss, dangerous occurrence
2	Medium	Significant injury, temporary disability, unconsciousness, acute or short term occupational disease, threat to personal safety, loss of or damage to property
1	Low	Minor injury and harm, intimidation, mild to moderate anxiety, near miss

Potential Likelihood Rating (PLR)

PLR	Likelihood	Guidance
4	Highly likely	Serious failure in or absence of management controls
3	Frequently or Regular	Lack of control or insufficient controls in place
2	Occasional	Lapses could occur if not adequately managed
1	Remotely Possible	Lapses could occur in exceptional circumstances

Considering existing control measures, both hazard ratings (PSR/ PLR) should be determined and then multiplied by each other to identify the **overall** risk rating for the hazard; i.e. the **risk rating number (RRN)**. Where the RRN is high, additional controls may be necessary to reduce this number. Calculating the rating will help with prioritising risk controls for the management and reduction of risk.

PSR X PLR = RRN		
Risk Rating	Score	Priority
RRN	1 -4	Low
RRN	5 – 9	Medium
RRN	10 - 16	High

A risk assessment template is shown below.

## Risk Assessment sample form GRA01

### NORTH LINCS COUNCIL - RISK ASSESSMENT TEMPLATE

Please use the following tables to help calculate the Risk Rating Number (RRN) for each work-related hazard you identify. Further information and examples are given in the guidance document that accompanies the risk assessment template. Useful information about completing risk assessments is also available on [www.hse.gov.uk](http://www.hse.gov.uk)

**Potential Severity Rating (PSR)** – if the hazard were to result in injury or harm, what would be the result of that injury or harm?

PSR	Severity	Guidance
4	Major	Death to one or more people, permanent or life changing disability
3	High	Chronic or terminal occupational disease, physical assault, damage to property, significant financial loss, dangerous occurrence
2	Medium	Significant injury, temporary disability, unconsciousness, acute or short term occupational disease, threat to personal safety, loss of or damage to property
1	Low	Minor injury and harm, intimidation, mild to moderate anxiety, near miss

**Probable Likelihood Rating (PLR)** – the likelihood that the hazard will result in injury or harm.

PLR	Likelihood	Guidance
4	Highly likely	Serious failure in or absence of management controls
3	Frequently or Regular	Lack of control or insufficient controls in place
2	Occasional	Lapses could occur if not adequately managed
1	Remotely Possible	Lapses could occur in exceptional circumstances

**Risk Rating Number (RRN)** – the Risk Rating Number derived from the calculation shown below is used to prioritise the observed risks.

PSR X PLR = RRN		
Risk Rating	Score	Priority
RRN	1 - 4	Low
RRN	5 - 9	Medium
RRN	10 - 16	High

A hazard is anything that can potentially be harmful to a person's life, health, property or to the environment.

Here are some examples of the different hazards that can be work-related, and potential means of exposure.

#### Ergonomic hazards

- Repetition
- Forceful exertion
- Awkward positions
- Contact stress
- Work area design
- Tool or equipment design

#### Chemical hazards

- Inhalation
- Skin contact
- Ingestion
- Absorption
- Injection

#### Psychological hazards

- Occupational stress
- Workplace harassment
- Violence
- Bullying
- Fatigue

#### Physical hazards

- Electricity
- Vibration
- Fire/explosion
- Noise
- Radiation
- Thermal stress
- Pinch points
- Slips/trips/falls
- Struck by object
- Crushing
- Falls from height

#### Biological hazards

- Blood-borne viruses
- Disease producing pathogens
- Zoonoses
- Mould
- Plant and insect poisons
- Tuberculosis (TB)
- Leptospirosis (Weil's Disease)
- Legionella (Legionnaires' Disease)

**Risk Assessment No.**

<b>Premises:</b>	<b>Service Area:</b>	<b>Task / Process / Activity:</b>			
<b>Completed by:</b>	<b>Post:</b>	<b>Date Completed:</b>		<b>Review Due:</b>	

Significant hazard or hazardous circumstances	Persons at Risk	Harm, injury, loss or damage that may occur	Existing controls (Findings)	Initial Risk Rating			Additional Controls Required (Risk Reduction Plan)	Residual Risk Rating			Action Completed by	Date Action completed
				PSR	PLR	RRN		PSR	PLR	RRN		


Risk Assessor's signature:

Date:

Manager's signature:

Date:

## Appendix C – Template forms

- EV1 – External Provider Statement

*To be completed by establishments wishing to use providers that do not hold the Learning Outside the Classroom (LOtC) quality badge (for category B visits in particular). This form should be completed by the provider and returned in advance of the establishment making a commitment.*

- EV2 - Consent form

*General consent form can be adapted and used for a range of activities & age groups*

- EV3 - Consent form (Swimming)

*Consent form for any visit involving water based activities*

- EV4 - Accident Record

*This form or similar should be completed following an accident on a visit*

- EV5 - Near Miss Record

*All near misses should be recorded to reduce the likelihood of accidents/ injuries in the future*

- EV6 - First Aid Record

*Any first aid administered should be recorded & retained along with accident/ near miss records.*

- EV7 – Volunteer Vehicle form

*Establishment staff must ensure that any vehicle being used to transport children is in a road worthy condition, that the vehicle is fully insured & the driver holds a relevant driving license.*

**EV1**

# North Lincolnshire Council

This form is NOT required for providers that hold a valid Learning Outside the Classroom Quality Badge. Details of the badge and a list of holders can be found at [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) Organisers requiring advice on the interpretation of information given by Providers on this form should contact their establishment's EVC.

## **PART 1: To be completed by the Visit Organiser**

Name & address of Establishment (school/service)	
Email (or fax)	
Type of Visit/Activity:	
Name of Visit Organiser	
Name of Provider	
Date(s) of visit	

## **PART 2: To be completed by the Provider**

Please give careful consideration to the following statements and respond with YES, NO or N/A, or give the specific information required. If you have been sent this form but hold a valid Learning Outside the Classroom (LOtC) Quality Badge, you need only complete Section A and the Confirmation.

### **SECTION A to be completed for all types of visit**

<b>1. Learning Outside the Classroom Quality Badge</b>		
1.1	Do you hold a valid Learning Outside the Classroom Quality Badge?	
1.2	If Yes, what is its expiry date?	
<b>2. Insurance</b>		
2.1	Do you hold public liability insurance, which will be current during the proposed visit, and which covers all directly provided and sub-contracted activity?	
2.2	If Yes, what is its indemnity limit?	£    M

### **SECTION B to be completed for all types of visit**

<b>3. Health, Safety and Emergency Policies</b>		
3.1	Do you comply with relevant health and safety regulations, including the Health and Safety at Work etc. Act 1974 and associated Regulations, and have a written health and safety policy and recorded risk assessments, which are available for inspection?	
3.2	Do you have accident & emergency procedures in place, with records available for inspection?	
<b>4. Vehicles</b>		
4.1	Are all vehicles to be used roadworthy, and do they meet the requirements of regulations in the country in which they will be used and EU regulations on passenger seats and seat restraints?	
<b>5. Staffing</b>		
5.1	Do you have a robust recruitment and engagement process to ensure that staff are suitable to work with young people, including enhanced DBS check and barred list check for any staff engaged in regulated activity?	

5.2	Are there regular opportunities for liaison between your staff and establishment staff?	
5.3	Is there sufficient flexibility to make radical changes to the programme if necessary, and will the reasons for any such changes be made known to establishment staff?	
<b>6. Accommodation</b>		
6.1	Does UK accommodation comply with current fire regulation requirements (Regulatory Reform, (Fire Safety) Order 2005)?	
6.2	Have you inspected all overseas accommodation to be used to confirm that it meets legal requirements of the country concerned and that it has fire safety and security arrangements equivalent to those required in the UK, and are records of these inspections available?	
6.3	Are there security arrangements in place to prevent unauthorised persons entering the accommodation?	
6.4	Are separate male and female sleeping accommodation and washing facilities provided?	
6.5	Is staff accommodation sufficiently close to young people's accommodation for adequate supervision?	
<b>7. Sub - Contracting</b>		
7.1	Will you sub-contract any services (e.g. activity instruction, transport, accommodation)?	
7.2	Where any element of provision is subcontracted, do you ensure that each sub-contractor meets the relevant specifications outlined in the other sections of this form, and are records of checks of sub-contractors available for inspection?	

**SECTION C to be completed if the visit includes activities or field studies**

<b>8. Adventure Activities Licensing Authority (AALA) Licence</b> to be completed if any activities are within the scope of the licensing regulations		
8.1	A ALA Reference number: Date of expiry:	
8.2	Does the Licence held cover all planned activities, which are in the scope of AALA licensing?	
<b>9. Activity Management</b> to be completed about all activities		
9.1	Do you have a policy for staff recruitment, training and assessment, which ensures that all staff with a responsibility for participants are competent to undertake their duties?	
9.2	Do you maintain a written code of practice for activities, which is consistent with relevant National Governing Body guidelines and, if abroad, the relevant regulations of the country concerned?	
9.3	Do you confirm staff competence by appropriate National Governing Body qualifications for the activities to be undertaken, or have staff had their competence confirmed by an appropriately qualified and experienced technical adviser?	
9.4	Where there is no National Governing Body for an activity, are operating procedures, staff training & assessment requirements explained in a code of practice?	
9.5	Will participants at all times have access to a person with a current first aid qualification, and are staff practised & competent in accident & emergency procedures?	
9.6	Is there a clear definition of responsibilities between your staff and visiting staff about supervision and welfare of participants?	
9.7	Is all equipment used in activities suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks as necessary?	

**SECTION D to be completed by Tour Operators**

<b>10. Tour Operators</b>		
10.1	If you are a Tour Operator, do you comply with the Package Holidays and Package Tours Regulations 1992 and The Foreign Package Holidays (Tour Operators and Travel Agents) Order 2001, including bonding to safeguard	

	customers' monies? Please provide ATOL, ABTA or other bonding body names and numbers below.	
Details of any bonding (ATOL, ABTA etc)		

**SECTION E – EXPEDITIONS to be completed for overseas expeditions**

<b>11. Expeditions</b>		
11.1	Do you agree to provide sufficient written information and assurances specific to the expedition, as required by the establishment and its employing body?	

**SECTION F – ACCREDITATION**

<b>12. Details of any accreditations held by the Provider</b>

**CONFIRMATION**

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

Signed: .....

Date: .....

Name: .....

Position in organisation: .....

Name of Provider: .....

Address of Provider: .....

.....

Tel: ..... Fax: .....

Email: .....

Website: .....

**Thank you for completing this form. Please return it to the Organiser at the establishment named above.**

EV2

# North Lincolnshire Council

## Parent Consent Form - Sample

Name of Establishment:	
Name of child:	Year Group:

### Details of the visit

Visit to:	
Departure Date:	Departure Time:
Return Date:	Return time:

### Medical Information

Does your child suffer from any condition requiring medical treatment or medication? Y/N
If yes please give details:
Does your child have any allergies – e.g. medication or specific food such as nuts? Y/N
If yes please give details:
Please state the type of pain/flu relief medication your child may be given if necessary.
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 three months. Y/N
If yes please give details:
Has your child had a tetanus injection in the last 5 years? Y/N
Are there any activities that you do not wish your child to take part in? Y/N
If yes please give details:

**Contact Information**

I may be contacted on the following details		
Name:		Relationship:
Home:	Work:	Mobile:
Home Address:		
If not available on the above, please contact:		
Name:		Relationship:
Home:	Work:	Mobile:

**Doctor details**

Name, Address & Telephone Number of family doctor	
Name of Doctor:	Tel Number:
Address:	

**Declaration**

*During the visit, the participating staff members will have legal responsibility for your child. This means that the staff will have to apply their skills and experience, as teachers & responsible adults, in supervising your child to protect them, so far as is reasonably practicable, against risks to their health and safety, as members of the school group. The staff will operate within the guidelines approved & issued by government departments and other advisory agencies consistent with the realities of any situation that may be encountered.*

I agree to;

- My child taking part in the above visit
- My child taking part in all activities (Please see separate programme)
- The need for my child to behave well & agree to them being sent home early if necessary
- My child receiving emergency medical, dental or surgical treatment, including aesthetic or blood transfusion, as considered necessary by the medical authorities present

I Understand:

- The total cost of the visit will be £.....to be paid in full by .....(date)
- The insurance cover provided

I will:

- Inform the visit organiser as soon as possible of any changes in the details above.

Signature of person with parental responsibility:	
Date:	Full Name:

**Failure to have a signed consent form will result in the child not being able to take part. The party leader should take a copy of this form & a copy retained by the school base contact.**

EV3

# North Lincolnshire Council

## Parent Consent Form (Swimming) – Sample

Name of Establishment:	
Name of child:	Year Group:

### Details of the visit

Visit to:	
Departure Date:	Departure Time:
Return Date:	Return time:

### Water confidence

Is your child able to swim 25 meters? (National Curriculum requirement 'swim competently, confidently and proficiently over a distance of at least 25m')	Y/N
Is your child water confident in a swimming pool?	Y/N
Is your child confident in the sea or in open inland waters?	Y/N
Is your child safety conscious in water?	Y/N

### Contact Information

I may be contacted on the following details		
Name:		Relationship:
Home:	Work:	Mobile:
Home address:		
If not available on the above, please contact		
Name:		Relationship:
Home:	Work:	Mobile:

### Medical details

Does your child suffer from any condition requiring medical treatment or medication?	Y/N
Name of Doctor:	Tel Number:
Address of family doctor:	

- I would like .....(name) to take part in the visit named above & having read the information provided agree to him/her taking part in the activities described.
- I consent to any emergency medical treatment required by him/her during the course of the visit.
- I confirm that my child is on good health and I consider him/her fit to participate.

**I will Inform the visit organiser as soon as possible of any changes in the details above.**

Signature of person with parental responsibility:	
Date:	Full Name:

**Failure to have a signed consent form will result in the child not being able to take part.  
The party leader should take a copy of this form & a copy retained by the school base contact.**

**EV4**

# North Lincolnshire Council

## Accident Record – Sample

Name of Establishment:	
Name of child:	Year Group:
Home address:	
Age:	Gender:

### Person reporting the accident/ incident

Name:
Home Address:
Occupation/ Department:

### Accident/ Incident details:

Date:	Time:
Location:	
Description of events:	
Equipment/ machinery involved:	
Action taken:	
Signature:	Date:
<b>Report to HSE/RIDDOR if applicable.</b>	

EV5

# North Lincolnshire Council

## Near miss log – Sample

Name of Establishment:	
Person/group involved:	Year Group:
Activity:	

### Person reporting the accident/ incident

Name:
Occupation/ Department:

### Accident/ Incident details:

Date:	Time:
Location:	
Description of events:	
Equipment/ machinery involved:	
Action taken:	
Signature:	Date:
Action to be taken in the future:	

**EV6**

# North Lincolnshire Council

## Record of First Aid – Sample

Name of Establishment:	
Name of child:	Year Group:
Age:	Gender:

**Person making the report:**

Name:
Occupation/ Job Title:

**Details of injury:**

Date:	Time:
Location:	
Description of events when injury occurred:	
Equipment/ machinery involved:	
Injury sustained & treatment provided:	
Signature:	Date/time of report:
<b>Don't forget to restock the first aid box.</b>	