



## **Off-site Activities and Educational Visits Policy**

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## 1 Introduction

In 2011 the Department for Education stated that they had reduced the guidance for schools wishing to take students off-site and their amended advice can be found on the DfE website. The DfE consent form for visits has also been included at the end of the policy. The Government's new advice can be obtained from the web link below.

<http://www.education.gov.uk/schools/adminandfinance/healthandsafety/f00191759/departamental-advice-on-health-and-safety-for-schools>

This was further updated in 2018, with advice and guidance as follows:

<https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits>

Whilst welcoming this reduction in principle, in practice there are many staff, senior leaders and governors who have no prior experience of the very specialist guidance that exists to ensure the safety of students in a wide variety of settings. We applaud the 'common sense' approach the government propose but also accept there are staff who need specific knowledge of what is considered safe practice in the many different settings that off-site education can encompass.

This policy document is therefore primarily written to support staff in the continued use of thorough and detailed guidance relating to off-site activities and educational visits. This document attempts to chart a clear course through the regulations for staff to ensure not only that the visit is safe and enjoyable, but also that all the relevant preparations and necessary paperwork have been completed.

## 2 Responsibility

The proprietor delegates responsibility to the Deputy Head for ensuring that all off-site education and visits are thoroughly planned and safely executed, using current advice and guidance from the DfE. At their discretion, the Deputy Head may seek the advice and assistance of others from within, and outside, the school to ensure students' safety and wellbeing.

## 3 Health and safety: Responsibilities and powers

These regulations set out the legal framework under education law, which applies to all educational visits. The proprietor is legally responsible for the health and safety of staff and students on educational visits. They may, however, delegate management of health and safety to key staff. Employees also have significant responsibilities as follows;

- To take reasonable care of their own and others' health and safety
- To cooperate with their employers
- To carry out activities in accordance with training and instructions
- To inform the employer of any serious risks

A teacher has a common law duty of care. This means the following

- A teacher has a duty of care for young people under their supervision
- A higher duty is expected of teachers as a result of their specialised knowledge
- The age of the young person, the nature and location of the activity help to determine the degree of supervision required

The advice contained in this document is intended to contribute to the continued provision of high quality, safe educational experiences for all students at the school. Aspects of good practice are provided and attention is drawn to the important processes of planning and preparation. Management and organisation is examined and the importance of review and evaluation identified. Particular attention needs to be given to the notification/authorisation procedures for certain visits and activities, which need to be provided in writing in advance of the visits and activities taking place. Following the procedures and advice in this document will aid those responsible for providing activities and visits to ensure that provision is as safe as it can be, as well as reassuring parents and others that the welfare of their children is paramount to those planning such activities.

**All staff and any other responsible persons are required to comply with this guidance. Failure to do so could constitute a disciplinary offence and may also breach insurance requirements.**

#### 4 Legal responsibility

The Proprietor is ultimately responsible for the health and safety of all staff and students in the school. These guidelines are one way of discharging their responsibilities in relation to school visits. The Proprietor's day-to-day responsibility is delegated to the Deputy headteacher.

However, the Proprietor is ultimately responsible for both staff and students, and also for any accompanying adults on a school visit. It is important for everyone involved that they are satisfied with the arrangements and that there is a record that they have been approved. Risk assessment for school visits is the key to successful safety planning. It is important to appreciate that risk assessment is an ongoing process, which continues throughout the visit and is not just a paper exercise – neither teachers nor the Proprietor is likely to be found at fault if they have made all necessary preparations and ensured that activities are carried out in accordance with proper procedures. To assist in this process, the role of the Educational Visits Coordinator (see below) should be formally recognised (This role could be dual held by the Deputy Head).

The trip leader is responsible for the planning and organisation (or the coordination, in appropriate cases) of the trip and for taking day-to-day decisions once the trip is in progress. There must always be a designated trip leader, who is a member of the teaching staff.

The accompanying teachers are *in loco parentis* (i.e. they are responsible for taking immediate and appropriate decisions) of the students in their charge at any given time. Recent case law has established that a teacher is unlikely to be held negligent if their decision is one within the reasonable range of options available to a reasonable teacher in the particular circumstances.

Even if other adults accompany the trip, the staff members remain ultimately responsible, in law, for the students. It is therefore essential that adults are properly briefed on their role.

Notice is drawn particularly to the KCSIE 2021 document and in particular the need to ensure the suitability of all adults engaged in regulated activities with young people.

#### 5 Educational Visits Coordinator

It is good practice for all schools to have an Educational Visits Coordinator (EVC) although there is not a legal requirement to have one. This should normally be the Deputy headteacher or Assistant Headteacher. It is not envisaged that schools should need to create or fund a new post, but rather that the EVC function will be recognised formally, thereby helping schools fulfil their health and safety responsibilities in relation to School trips. In particular, the formal recognition of an EVC (where this is not the Head Teacher) should help the Head Teacher to be sure that this delegated aspect of their health and safety responsibilities is being properly fulfilled.

EVCs (whoever is designated) should report through the school's Health & Safety processes on any issues arising from trips being planned or recently taken, and their report should be considered through the normal processes.

##### 5.1 Functions and competencies of Educational Visits Coordinators

The DfE guidance suggests that the EVCs' functions are as follows

- To liaise with the school to ensure that educational visits meet the school's requirements, including those of risk assessment, in approving trips and other decisions
- To assign competent people to lead or otherwise supervise a visit
- To assess the competence of leaders and other adults proposed for a visit. This will commonly be done with reference to accreditations from an awarding body and it may include practical observation or verification of experience
- To identify training needs and ensure that training is in place for leaders and other adults going on a visit. This will commonly involve training such as first aid or hazard awareness.
- To organise thorough induction of leaders and other adults taking students on a specific visit

- To make sure that enhanced DBS disclosures are in place, as necessary
- To work with the group leader to obtain the consent or refusal of parents and to provide full details of the visit beforehand so that parents can provide consent or refuse consent on a fully informed basis
- To organise a school framework/cascade system for emergency arrangements and ensure there is an emergency contact for each visit
- To keep records of individual visits, including reports of accidents and 'near accidents' (sometimes known as 'near misses')
- To review systems and, on occasion, monitor practice

The EVC would therefore have responsibility for ensuring that all staff organising school trips plan these properly and carry out appropriate risk assessments and checks on providers, for example. The monitoring and reviewing process will provide the school with a formal mechanism for demonstrating that it takes on board any lessons from visits where things may not have gone according to plan, to introduce new checks and identify training needs, as appropriate.

The EVC should be competent to carry out all of the above functions, and be fully familiar with HASPEV and its supplements (which will be provided to the group leader when a trip is suggested). The appropriate level of competency will of course depend on the size of the group and the types of visits undertaken. Evidence of competence may be through qualification and/or experience of practical leadership over a substantial period of time.

It may also be appropriate to consider if any additional training will be necessary to ensure that the EVC is fully competent to carry out the role.

## 6 Curriculum links

Every off-site activity and educational visit should have a clear educational purpose and, where possible, be linked to the curriculum and be identifiable in the various National Curriculum documents, where applicable. These purposes should be documented and, if applicable, a copy should accompany Form EV1 (see below). An easy way to show these is to construct a 'spider diagram' showing each relevant curriculum subject and the areas of study included in the visit.

### 6.1 Approval

The Deputy Headteacher **must** formally approve any off-site visit in Type B or C (see below for details) **before** it is advertised to students. Form EV1 is available for this purpose and a copy of this form is shown in Appendix 1. The completed form should be returned in the first instance to the EVC. In due course, a copy of the form, showing the Deputy Headteacher's decision, will be returned to the trip proposer (usually the prospective trip leader).

## 7 Required planning procedures for educational visits and trips

The Deputy Headteacher **must** be notified of all out-of-the-ordinary visits, residential visits, visits abroad (including day visits), and adventurous activities via the EVC, using Form EV1 (see Appendix 1). The completed form, accompanied by the visit aims and objectives, curriculum links, risk assessment and an outline programme of the intended activities, should be sent to the EVC **at least two months** before the intended visit. Should the visit be a school-led adventure activity, additional information is required. In these circumstances, please see the EVC. You are strongly advised to keep a photocopy of the completed form before submitting it. The EVC will arrange for a copy to be filed. Copies of this form are available from the EVC.

Note. Should the visit include voluntary helpers that have not been BBS checked by the School, this should be indicated on Form EV1 by writing '**DBS Form submitted**'.

**Failure to carry out such notification and obtain authorisation may constitute a criminal offence.**

## 7.1 Category of activities and visits

Table 1 summarises the notification and authorisation procedures and policy to bring it in line with DfE procedures.

Visit type	Activity
Type A	Routine local visits, e.g. use of local library, sports fixtures with local schools, other visits to local schools  Community and enterprise projects
Type B (School approval process)	Non-routine visits <b>not involving</b> an overnight stay, travel to foreign countries or adventurous activity (unless provided by LA-approved providers), e.g. Alton Towers, theatre trips, museum visits
Type C	Non-routine visits <b>involving</b> adventurous activities and/or overnight stays, and/or foreign travel, e.g. trips to France, DfE expeditions, water sports, residential stays

Table 1

### Type A visits

Type A visits are routine visits that run two or more times a year. They generally involve only short journeys and involve no greater risk to students than that which they would encounter in a normal day-to-day activity. Each visit follows a similar format, often using the same venue. In order for Type A visits to leave the school, group leaders must ensure the following

- That they are satisfied that the risk posed to staff and students is no greater than those they encounter in day today life
- Procedures for the visit have been agreed and recorded (a copy should be given to the EVC in advance): this includes the completion of two Forms EV1 and relevant sections of the Visit planning checklist
- Appropriate written parental consent has been established for any non-routine curricular visit
- If that visit takes place during school hours, a designated member of staff has a list of the students and staff involved, contact details, details of the activity and an estimated time of return
- If not during School hours, a designated member of staff who would act as the contact in the event of an emergency is identified. This person should be well informed about the visit and have sufficient information to be able to act appropriately in the event of an incident

Off-site sports fixtures represent a special category within Type A visits. For every fixture, details of the venue, student and staff names and the likely return time must be left in reception and with the EVC.

### Type B and C visits

Type B and C visits are non-routine, and carry an increased level of risk. These types of visits require full approval of the EVC; for Type C, they also require approval from the Head Teacher and full SLT agreement. The stages below must be followed for these types of visits to be formally approved. It is advisable to plan well in advance of any intended visit or trip.

### *Stage 1 – Initial approval*

The prospective trip leader submits Form EV1 and Visit planning checklist to the EVC **before any formal bookings or contact with parents**. This should be done no later than **two months** before the planned visit for Type C, and no later than **one month** for Type B.

### *Stage 2 – Planning, risk assessment and finance*

Once initial approval has been given, and a code of the visit is given (e.g. A1234), detailed planning can start.

At this stage, the trip leader makes the necessary provisional bookings, gains parental consent, and plans the details of the visit in accordance with DfE guidance contained in *HASPEV*, any additional DfE guidance updates and the guidance provided by the EVC.

It is important that the trip leader at this stage consults with the EVC regarding planned bookings of transport, activities and charging of students. The EVC will be able to give guidance on appropriate costs (including any supply cover/costs required), and methods of payment collection.

The EVC will require the following information from the trip leader

- Number of students going on the visit
- Number of learning coaches and other staff who are going on the visit
- Number of supply teachers needed to cover staff on the visit
- Destination details
- Date(s) of intended visit
- Cost of accommodation, entrance fee, etc
- Number of coaches/minibuses required (Finance will negotiate costs with suppliers)

### *Stage 3 – School approval: Completion of Form EV2*

Once the visit has been planned in detail and a Form EV2 has been completed and submitted with all other documentation, the EVC will then arrange for approval by the necessary individuals and/or bodies. Other documentation should include the following

- Risk assessments for the journey
- Risk assessments of the activities in which the students will participate
- Safety documentation from the transport providers/tour operators
- A detailed itinerary for the visit, which includes each activity

All appropriate documentation for Type B visits must be with the EVC preferably three weeks before the intended visit or, at the very minimum, seven days before.

### *Stage 4 – Type C visits only*

In the case of Type C visits, the documentation approved by the School is forwarded by the EVC to the Proprietor and the trip will be discussed by the full SLT. Once the Proprietor are satisfied that the visit has been appropriately planned and risks to those involved accounted for, approval will be granted in writing.

All documentation for Type C visits must be submitted no later than two months prior to the proposed date of the visit.

Once the necessary persons and bodies have approved the documentation, the trip is then fully authorised.

**Any visit that has not been approved through this process must not go ahead.**

### **7.3 Calculating costs – including insurance**

In addition to the obvious factors (e.g. travel, accommodation, admission costs), unless the visit is part of a travel package including insurance, the cost of insurance must be included. If the visit or any part of it occurs within school hours, the cost of supply teacher cover also needs to be included. Administration costs, including reprographics, must be included, too. It is also acceptable to include an element of cost as a contingency fund in order to cover incidental expenditure.

The accounts for any one trip will be closed immediately after the trip has taken place. It is therefore imperative that the school is informed of any outstanding debts at this time. Since all off-site visits should be non-profit making, the school considers it to be good practice to make a refund if the remaining balance is £1 or more for a day trip and £5 or more for a residential trip.

For visits that are repeated year after year, it is imperative that costs are recalculated every time the visit is planned, rather than simply increasing the costs by a predetermined percentage.

### **8 Role of the trip leader**

In the light of recent court cases, in terms of health and safety and legal responsibility, the role of the trip leader (referred to as 'group' leader in DfE documentation) and their decisions are sacrosanct. However, although the trip leader carries out delegated tasks on behalf of the School, the employer retains ultimate responsibility. (Further details on the duties of the trip leader are in Appendix 4.)

The trip leader has overall responsibility for the supervision and conduct of the visit, including direct responsibility for the students' health, safety and welfare. The trip leader is the person exercising an enhanced duty of care throughout the venture. In other words, the trip leader is **always in charge** and, where the trip leader's knowledge of the group is superior to that of an activity leader, the trip leader must be willing to challenge or intervene to prompt a change of plan (including stopping an activity) if the safety of the group is compromised.

In the event of a serious behaviour incident shortly before a school visit, the Proprietor, in consultation with the trip leader, will make the decision as to whether or not a student will be allowed to participate. During a school visit, the decision of the trip leader as to whether or not a student participates shall be final. In the event of a serious behaviour incident during the visit, it may become necessary for the student to return home prematurely. Should this be the case, the student's parents should be contacted and requested to collect their child from the visit venue at their own expense. The Proprietor should also be advised of this sanction, without delay. Should a student be excluded from all or part of a school visit, all monies paid in respect of the visit will be forfeited. If a student is excluded before the visit takes place and another student can fill the vacancy, monies will be refunded wherever possible, except for the non-returnable deposits.

With this in mind, the Parent/guardian consent form (for both visits in the UK and abroad) contains an appropriate clause about the authority of the trip leader and sanctions in the event of a serious behaviour incident.

Every educational visit should also have a named deputy leader. The deputy leader must work alongside the trip leader throughout the planning stages, and be conversant with all arrangements made in order that they can deputise in the event of the trip leader becoming ill or unable to lead the visit for other reasons.

### **9 Parental information**

Appendix 1 contains a model letter that should be used to inform parents of the proposed visit.

It is recommended that a parents' evening be held for any residential visit. This allows parents to meet the trip leader and all other accompanying staff, including volunteer helpers. It also provides the ideal opportunity to impart detailed information to parents and allow them the opportunity to ask questions. A record should be kept of any questions asked and answers provided at such a meeting. The EVC will attend such meetings by request.

In order that all essential information is imparted a Parents' evening checklist is included in Appendix 2.

## 10 Staff and student preparation meetings

In addition to parental information evenings, it is important to meet all students for a number of sessions prior to the visit to either convey information or to emphasise expectations. Clearly, the number of meetings will depend on the nature and duration of the visit. A meeting or number of meetings for staff to help to prepare them is strongly recommended. Staff can also be invited to help organise elements of the visit and it is good practice to identify as precisely as possible staff duties and activities for visits. It is advisable that one meeting with staff, usually the first, is spent reviewing this policy and other relevant documents.

## 11 Parent/guardian consent forms

### 11.1 Individual visit

A consent form must be completed by the parents or guardians of every student participating in an off-site visit. Samples of such forms are shown in Appendix 1.

If a student is subject to a care order, foster parents will need to ensure that the Social Services department gives written consent for any proposed trip abroad. If a student is a ward of court, the Proprietor should seek written advice from the court in relation to School journeys and activities abroad well in advance. In both cases, the trip leader should take with them on a copy of the written consent the visit.

**Completed Parent/guardian consent forms must be taken on the visit so that you have the necessary written permission and relevant information in the event of medical treatment being required by a member of the group. Copies should be made for other supervisors, as necessary.**

### 11.2 Frequent off-site visits

For off-site visits that occur frequently within the school academic year (e.g. sports fixtures, off-site education), parents are requested to complete an annual consent form. A copy of the annual Parent/guardian consent form is shown in Appendix 1 of this document. These will be sent out to parents, via students, at the start of the autumn term. They should be returned to the EVC, who will make arrangements for their collation and filing. Group lists of forms returned will be compiled. Copies of these lists will be held in the school reception, the staff common room and other relevant areas. Any member of staff requesting copies of the completed annual Parent/guardian consent forms should see the EVC.

### 11.3 Jehovah's Witness letter of consent

In the case of students who are Jehovah's Witnesses, a letter of consent clearly outlining the medical exclusions to be imposed is included in Appendix 1. The letter should be completed prior to commencement of the visit or activity. The completed letter, along with a copy of the young person's Medical Directive/Release Card, should be attached to the letter of consent and taken on the visit. The letter releases the school and any staff members acting on behalf of the school from any liability for any consequences arising from such exclusions and also in the event that such documentation is not available or information communicated to medical staff.

### 11.4 Roll lists

A list of names, addresses, ages and brief medical history, current medical conditions, allergies and emergency contact numbers should always be carried by the trip leader and smaller group leaders. This can be readily printed on one or two sheets of A4. It is also advisable for all other adults to have copies of this information, although medical information should only be shared insofar as is necessary to enable the adults in question to carry out their responsibilities. Anyone to whom such information is given must understand its confidential nature.

## 12 Student code of conduct

A Student code of conduct for all out of school activities is included in Appendix 1. Parents and students should be asked to complete the code of conduct accordingly.

## 13 Supervision

### 13.1 Duty of care

All adults connected with a visit or activity owe a duty of care in common law to the young people they accompany. Teachers taking a group away from the School have a higher duty of care. The duty of care expected is that of a reasonable, prudent and careful parent applying his or her mind to the specific situation. The duty is continuous during the whole period of the visit and cannot be delegated to anyone else. Because teachers are trained professional people, courts in the UK have tended to expect them to exercise a higher standard of care than that which is expected from the general public.

### 13.2 Responsibility

**The trip leader is responsible overall for the group at all times. They may, however, delegate supervisory roles to other adults in the group.**

When delegating supervisory roles to other adults the trip leader should do the following

- Allocate supervisory responsibility to each adult for named students and ensure that all adults understand that they are responsible to the trip leader for the supervision of the students assigned to them
- Ensure that each adult knows which students they are responsible for
- Ensure that each student knows which adult is responsible for them
- Ensure that each adult has the means to contact the trip leader and/or other supervisors
- Ensure that each adult has knowledge of and clearly understands the School's agreed emergency procedures policy

Supervision can be close or remote, but **is always 24 hours**, including 'staying in other homes' visits, but supervisors are not expected to stay awake for 24 hours each day. In order that each adult supervisor gets quality rest and recuperation, a duty roster should be arranged. It is not expected that staff on duty throughout the night stay awake, but that they are readily contactable. It is essential that everyone involved in the visit understands the supervision arrangements and expectations.

### 13.3 Close supervision

Close supervision occurs when the group remain within sight and contact of the supervisor. Close supervision normally means the following regarding all supervisors

- They will have prior knowledge of the students, including any special educational needs, medical needs and disabilities
- They will carry a list/register of all group members
- They will regularly check that the entire group is present
- They will have appropriate access to first aid
- They will ensure that each student knows what to do if they become separated from the group

### 13.4 Remote supervision

Remote supervision occurs when, as part of planned activities, a group of students work away from the supervisor, but is subject to stated controls as recorded in the risk assessment. Such a situation could involve activities such as the Duke of Edinburgh's Award or Girl Guide expeditions. The supervisor is present, but not necessarily near or in sight. The trip leader still remains responsible for students during this time, even though they are not in direct contact with them. When supervision is remote, the following must take place

- Groups must be sufficiently trained and competent for the level of activity to be undertaken, including how to deal with emergencies
- Students should understand and accept the expected standards of behaviour
- Students will be familiar with the environment or similar environments and have details of rendezvous points and times
- Clear and understandable boundaries must be set

- There must be clear lines of communication between the students, the supervisor and the school
- The students should know the whereabouts of the supervisor and should have a means of contacting them
- A student should never be on their own - it is advisable that they be in a minimum group of at least three students
- The supervisor should monitor the group's progress at appropriate intervals
- The supervisor will be in the activity area and able to reach the group reasonably quickly should the group need support in an emergency
- There should be a recognisable point at which the remote supervision is completed

Remote supervision will apply to the times during home-stay visits when students are with their host families.

### 13.5 Night time

In residential situations, during night time the security of the group is of paramount importance. The trip leader should ensure, as far as is reasonably practicable, the following

- Teachers have sleeping accommodation on the same floor and as near as possible to the students' accommodation
- Child protection arrangements are in place to protect both students and staff (see the Safeguarding Policy for further details)
- Where hotel/hostel reception is not manned 24 hours a day, security arrangements are in force to stop unauthorised visits
- In the absence of 24-hour staffing of reception, external doors should be made secure against intrusion and windows closed as necessary to prevent intrusion
- Where possible, internal doors should be lockable, but staff should have reasonable access to student accommodation at all times
- All staff and students know the emergency procedures/escape routes in the event of a fire or emergency evacuation

### 13.6 Staffing ratios

When considering staffing of an activity or visit, it is essential to recognise that the following guidance represents the **minimum** level of staffing only and in reality will be determined by the risk assessment. Adequate consideration must be given for the maintenance and welfare of the whole party in the event of one or more adults having to leave the group for any length of time. The following points need to be taken into account

- The leader of any off-site visit or activity should be a teacher
- There should always be a minimum of **two** adults with any party engaged in an off-site visit or activity
- The needs of individual students within the group, including those with specific special educational or medical needs
- Adventurous activities will usually require a higher leader: young person ratio. Please refer to Part 2 of the supplements to HASPEV for further advice
- All residential visits should be accompanied by at least **two** adults. Where the group population is of mixed sex then **both male and female** adults should be present - this also applies to home stay visits
- For visits abroad, all groups of young people below sixth-form level should be accompanied by at least **two** members of staff

### 13.7 Consideration to our students special needs

It is unlawful for schools to treat a disabled student less favourably than their non-disabled peers because of their disability. Schools must make reasonable adjustments to ensure that disabled students

are not put at a substantial disadvantage compared with non-disabled students. The duty not to discriminate (without justification) extends to all aspects of school life, and is particularly relevant to school trips.

Where students are identified as having particular special educational needs (SEN), this must be reflected in a higher staffing ratio, which must not be less than that which applies in the school and in most cases will need to be higher. Staff would need to take into account the terms of the Disability Discrimination Act and the Equality Act. **All reasonable steps must be taken to include young people covered by these Acts.**

First, it places a duty on the School to plan in order to ensure that the school is made more accessible to students with disabilities. The plan needs to include improving accessibility in terms of the following

- The environment
- The curriculum
- Information

Second, it places a duty on the school not to discriminate against a disabled student either intentionally or unintentionally where such discrimination can be prevented by taking **reasonable measures**.

All aspects of the Acts need to be considered when planning an off-site visit or activity where disabled and SEN students are involved. The assumption needs to be that disabled and SEN students are to be included in all off-site visits and consideration should be given to the needs and abilities of all students in the relevant class or group when designing the visit, including destination and range of activities. Where a specific individual's inclusion appears to require special adjustments, a risk assessment should be undertaken – first, in terms of the whole visit or activity and second, a risk assessment in relation to the inclusion of the individual student. The risk assessment should include details of any special aids and equipment that the student may need and, in particular, details of any such items to be brought from home or obtained prior to the visit. At this point, a decision should be made as to whether or not the measures required to include the student are reasonable.

Where students have statements of SEN that provide support in the school for access to the curriculum, and where the visit or activity takes place during term time, the level of ancillary support may be used at the same level as provided by the Local Authority for the statement. The school should, however, build the costs of the necessary support beyond this into its planning for the visit or activity, so that it is included in the overall package. In certain circumstances, charity funding may be available for students with physical disabilities. For details, please see the EVC.

For students with mobility difficulties who hold a Blue Badge for parking concessions, it may be beneficial for the Blue Badge to be displayed in the windscreen of the coach. Mention of this at the arrival of a venue may result in priority parking as close as possible to the venue entrance. Similarly, mention of a Blue Badge at a ferry port would usually result in priority loading, such that the coach is parked close to the lifts on the vehicle decks. It may also be of significant benefit for a disabled student to carry some proof of their disability. Regrettably, word of mouth is often not sufficient proof of their disability.

Further guidance can be found in the code of practice for schools, issued by the Disability Rights Commission ([www.drc.org.uk](http://www.drc.org.uk)).

### **13.8 Voluntary helpers, child protection and Criminal Records Bureau checks**

Use of parents, or other voluntary staff or helpers (including non-teaching staff) as supervisors is acceptable.

Recent legislation, namely the Education (Independent School Standards) (England) (Amendment) Regulations 2007, places volunteers in the same category as 'staff'. Accordingly, they must be fully aware of the visit risk assessment, itinerary, special instructions, emergency procedures and any other relevant information.

Should voluntary helpers (including student teachers, parents and partners of staff) be used on off-site visits, it is imperative that appropriate enhanced DBS checks are carried out in accordance with Child Protection legislation and current guidance. DfE guidance *Keeping Children Safe in Education (KCSIE)* aims to prevent people who are barred by the Secretary of State from being directly employed by a local authority, School or college from getting around the ban by doing one of the following

- Working as a volunteer
- Working in a business that is contracted to provide services to academies, schools or students attending them

Checks **must**, therefore, be carried out on any volunteer who

- Accompanies a residential trip
- Has regular, long-term contact with students
- Is likely to be in sole charge of a student under 18 years of age on a one-to-one basis

Irrespective of whether the volunteer has had an enhanced DBS check carried out by another body, the school will carry out a further check.

The Proprietor must be made aware of any prospective voluntary helpers and a copy of the completed form must be filed in at the school reception. Since these checks are quite lengthy, as much notice as possible should be given.

Eventually, both the volunteer and the Proprietor will receive an acknowledgement and, hopefully, approval. The volunteer will also receive a disclosure certificate. The volunteer will be asked to present their disclosure certificate at the school reception, in order that a record of the clearance date and disclosure number can be kept on the central file. Once approval has been obtained, should the same person accompany students again, it should not be necessary to submit another form unless the individual's circumstances have changed.

The trip leader should also gain assurances from any contractors that appropriate enhanced DBS checks have been made for any of their staff who are likely to have access to students as part of their normal duties.

### **13.9 Children accompanying staff**

All staff should be aware of the problems that can arise when their own children accompany a particular visit or activity. In these situations, a conflict of role may occur. Where staff members do take their own children on a visit or activity, the staff member **should not** be included in the staffing ratios unless they are supervising a group at all times which **does not** include their own child.

## **14 Travel**

### **14.1 Hire of buses and coaches**

If coach companies local to the destination are being used, confirmation of insurance cover from the company's insurers and a copy of the operator's licence should be obtained. It is appreciated that this may be difficult outside the UK, and the Proprietor must use discretion in approving arrangements.

DfE guidance states 'Where a road vehicle has seatbelts, students must wear them'. It is now school policy that **all** buses and coaches used by this school for off-site visits have seatbelts fitted to all seats, irrespective of the type of journey or distance travelled, and that these seatbelts are worn.

In order to comply with the latest DfE Risk Assessment guidelines, when hiring a bus or coach, the trip leader should verify the following points

- That all bus/coach drivers employed by the company are legally and physically fit to drive buses/coaches when transporting students, inasmuch as they hold the correct level of driving licence and do not suffer from any known medical condition that would prevent them from driving

- That buses/coaches in which students will travel are legally fit for public transport, inasmuch as they are taxed, insured and have passed an MOT test and other appropriate safety standards
- That all buses/coaches have seatbelts fitted to all seats and are in working order
- That there will be an appropriate number of drivers when travelling on long journeys or when travelling abroad (i.e., two or more drivers for continental journeys, as necessary)
- That coach drivers who are likely to be in a one-to-one situation or accompany and stay with a group on a residential visit are enhanced DBS checked

If a member of staff or other adult is assisting a child to put on a seatbelt, appropriate physical contact with the child must be considered.

With regard to the wearing of seatbelts in Europe, it is school policy that seatbelts be worn, irrespective of the laws for the particular country. Should continental vehicles be used, the trip leader should check that seatbelts are fitted at the time of hiring.

In line with some local authorities, it is recommended that buses, as opposed to coaches, are **not** used for long journeys. A travel time of one hour on local roads (i.e., non-motorway) is considered to be a reasonable maximum use of a bus.

### **14.2 Use of minibuses**

A minibus must not seat more than 16 passengers and must have forward facing seats with seatbelts, which is compulsory by law. It is illegal for students to sit on rear facing or side facing seats.

If self drive minibuses are to be used for the conveyance of students, parents should be informed of the arrangements and should acknowledge these arrangements by signing an appropriate consent form.

It is good practice that a second member of staff is present to manage the students, enabling the driver to concentrate their attention fully on driving. In order to drive a minibus, staff must take a compulsory assessment of their driving and obtain a certificate of competency through the Minibus Driver Awareness Scheme (MiDAS) – a nationally recognised award.

### **14.3 Use of private cars**

#### **Staff/Parent cars**

The use of staff or parents' cars should not be encouraged as organised transport. If the trip is not in school time, it is preferable for parents to be asked to make arrangements for their own children to be taken to the departure point. Where use is unavoidable, the Head Teacher must ensure that staff and/or parents have third-party fire and theft insurance (and for staff, business insurance) and a clean driving licence. Parental consent should be obtained.

Should parents be asked to provide transport for students, it is equally important that they check their insurance cover and the teacher organising the visit ensures that there is sufficient cover for the passengers. Parents **must** also have comprehensive insurance, but usually conveyance of students would be deemed as for social, domestic and pleasure purposes, for which all insurance policies provide cover. When parents are providing transport, their own child **must** be the last one to leave the vehicle.

#### **Students' cars**

These should **not** be used as part of the arrangements. There is no objection to students driving from home to an agreed meeting point.

### **14.3 Bus, coach or minibus use**

The trip leader should ensure the following

- Supervisors have reserved seats that allow them to supervise properly. If a double deck bus or coach is used, there must be at least one supervisor on each deck
- Students are supervised when boarding and alighting. A Head Teacher count should be made on each occasion

- Extra care is taken when alighting from a right hand drive vehicle in a country that drives on the right as it is most likely that some doors will open onto the roadside opposed to the kerb side
- Evacuation procedures, the locations of the first aid kit and fire extinguisher are known and understood by everyone, luggage is securely stored and emergency exits are kept clear

#### 14.4 Air, train or ferry/boat

Air, train and ferry companies will often make available a member of their staff to coordinate the activities of a group while in the departure terminal or station, and make any necessary onboard arrangements.

The trip leader should ensure the following

- When travelling as foot passengers, a base is established in the ferry terminal while awaiting departure, and upon arrival while awaiting delivery of the luggage
- Luggage for the whole group is kept together
- When travelling by vehicle, everyone should know the location of the coach, e.g. vehicle deck number and colour zone
- Whether on foot or by vehicle, students are supervised when boarding and alighting. A head count should be made on each occasion
- A base is established on board the ferry/boat
- The ship's crew is aware that the group is on board. Some ferry companies request that students are readily identifiable, e.g. by means of a badge. However, for personal safety reasons, badges should not bear the students' names
- Emergency procedures are known and understood by everyone, hand luggage is securely stored and gangways are kept clear

#### 15 Staff absence

Should a member of staff be absent from work due to illness, they **must not** participate in any off-site visit.

#### 16 Safety management systems (risk assessment)

This is crucial to the success of the trip; in health and safety terms it is called 'risk assessment'.

**It is impossible to over-emphasise the importance of this process, both before and during the trip.**

Risk assessment and risk management are legal requirements. The aim is to make sure that no one gets hurt or becomes ill. The risk can be minimised by the following

- Supervision (the level and method of)
- Protection (the implemented measures)
- Training (informing adult supervisors and students)

The school is only responsible for risk assessing those parts of the visit that it is organising. If services are being 'bought in' then the provider is legally responsible for risk assessing these parts of the visit. However, the school risk assessment should make note of this. A risk assessment is no more than a careful examination of what could cause harm to people during activities. In this way, you can weigh up whether you have taken enough precautions to prevent harm or if you need to do more. The aim is to take all reasonable steps to make sure that no one gets hurt or becomes ill.

A written risk assessment **must** always be carried out before setting off on a visit or activity, whether residential, day or part-day. This is normally undertaken by the trip leader, for which a pro forma is available from the EVC. A sample of this form is included in Appendix 3 of this document. The trip leader should use only the pro forma accepted by the school so that the format is standardised such that anyone can read and understand the information without confusion. For 'severity' and 'likelihood', the categories to be used are 'low', 'medium' and 'high'.

The risk assessment should include the following

- What are the hazards, and what level of risk do they offer?
- Who is affected by them?
- What safety measures need to be in place to reduce risks to an acceptable level?
- Can the trip leader guarantee that these safety measures will be provided?
- What steps will be taken in an emergency?

The risk assessment should also explicitly cover how SEN and medical needs are to be addressed.

When carrying a risk assessment, ask yourself the following question: 'Would I do it if it was my own child?' Unless the answer is an immediate 'Yes', then don't do it!

A copy of the completed risk assessment **must** be given to and approved by the EVC before the visit or activity commences. If appropriate, a copy should also accompany Forms EV1 and EV2, which are reviewed by the Proprietor.

**The completed risk assessment must be read and understood by all staff accompanying the off-site visit and each member of staff should have a copy of the agreed risk assessment.**

The risk assessment should also be made available to parents and displayed prior to the visit so that participating students have the opportunity to read and understand its content.

The programme of a visit, as set out in the risk assessment, should not generally be deviated from. However, any risk assessment should be ongoing, such that it can take account of, for example, illness of staff or students, changes in weather or availability of activities. This also includes emergency situations. The trip leader and at least one other member of staff should reassess risks while the visit takes place. Ongoing risk assessments normally consist of judgements and decisions as the need arises. They must take account of local expertise on, for example, tides, potential for flooding, volume of traffic, local hazards. Ongoing risk assessments are not usually recorded until after the visit, but **must** be recorded as soon as possible, when a copy should be given to the EVC. This is often referred to as 'Plan B'.

The risk assessment should be made up of the following three levels

- Generic – those elements likely to apply to the activity whatever and wherever it takes place, e.g. transport arrangements, illness, becoming lost
- Visit-/site-specific – those elements which will differ from place to place and group to group, e.g. at a museum, sports fixture, theme park
- Ongoing – to take account of, for example, changes in the weather, illness of a party member or availability of an activity

Samples of completed risk assessments should also be available, by request, from the EVC. Should colleagues need assistance in completing a risk assessment, please see the EVC.

### **16.1 Risk assessment and contractors (providers)**

Contractors (providers) may include tour operators, outdoor education centres, farms, museums, and activity centres – i.e. any services that are paid for. Contractors are responsible for assessing the risks of those parts of the visit appearing in the contract. Assurances should be obtained from contractors that risks have been assessed and that the contractor's staff are competent to instruct/lead students of the group's age and range on the activity. It is good practice to seek details of their safety management systems, i.e. obtain a copy of their risk assessment, and details of any independent, inspection based, external verification. However, the legal responsibility to provide risk assessment for these parts of the visit rests solely with the contractor.

### **16.2 Risk assessment and tour operators**

The trip leader should check that the company shows due diligence in checking, for example, the safety and suitability of accommodation and transport (e.g. students should **not** be expected to share beds and road transport **must** have seatbelts). Details of insurance should also be obtained and checked. Should colleagues need assistance in this please see the EVC.

## 17 Emergency procedures

These procedures are based on those contained in DfE Circular 22/94, and should be used in the event of serious or fatal injury. In any shared responsibility situation, they should be agreed in advance with the centre/other school involved. An emergency is unlikely to occur in circumstances where these procedures can be carried out to the letter, but staff accompanying the party should be familiar with them to the extent that they are able to adapt them to the situation in which they find themselves.

The trip leader (or staff member in charge of small sub-group, if out of contact with the trip leader until they can be contacted) should do the following

- Establish the nature and extent of the emergency
- If there are injuries, immediately establish their extent, so far as possible, and administer appropriate first aid
- Establish the name(s) of the injured and call whichever emergency services are required
- Make sure all other members of the party are accounted for and are safe
- Advise other party staff of the incident and that the emergency procedures are in operation
- Ensure that an adult from the party accompanies casualties to hospital
- Ensure that the remainder of the party are adequately supervised throughout and arrange for their early return to base
- Arrange for one adult to remain at the incident site to liaise with emergency services until the incident is over and members of the party are accounted for
- Control access to telephones until contact is made with the emergency contact point, Proprietor or designated senior member of staff and until they have had time to contact those directly involved. Give full details of the incident, namely the following
  - name
  - nature, date and time of incident
  - location of incident
  - details of injuries
  - names and telephone numbers of those involved
  - action taken so far
  - telephone numbers for future communication

For serious incidents where the media may be involved, try to identify alternative telephone numbers at 'home' and at an 'off-site base', as other lines will quickly become jammed. It is not for the trip leader or other party members to discuss matters with the media; procedures for this are given below. Under no circumstances should the name of any casualty be divulged to the media.

The Proprietor should arrange to contact parents/carers of those involved. For a serious incident, the Proprietor should contact parents of all party members. It is also the Head's responsibility to act as a link between the group involved and the parents.

If it is necessary to talk to the media, the Proprietor should agree who should make the initial statement. A designated person should then act as the ongoing point of contact with the media, to whom all involved should direct questions and requests. This person will need to liaise with the emergency services, perhaps on-site. It is advisable for the Proprietor to designate one of the senior leadership team with responsibility for media liaison, to enable them to concentrate on managing the incident.

The trip leader should write down, as soon as practicable, all relevant details while they are still fresh in the memory of those involved. Other party staff members might also be asked to do the same. A record should be kept of names and addresses of any witnesses. Any associated equipment should be kept in its original condition.

Details of the school's agreed emergency procedures, including key telephone numbers, should also be available on a pocket sized laminated card, and should be carried by every member of staff involved in the off-site activity. It is useful to include on this card the personal mobile phone numbers of off-site staff, so that communication within the group can be maintained

Legal liability should not be discussed or admitted.

All accident forms should be completed and insurers and the Health and Safety Executive (HSE) should be contacted in the event of serious accidents or injuries. The Proprietor or EVC will advise regarding contacting the HSE.

### **17.1 Students' use of mobile phones**

In any emergency situation it is advisable to instruct students **not** to use mobile phones unless they are summoning help, e.g. the emergency services. The wrong information transmitted to the wrong people can cause hysteria, panic and undue distress. All information should be disseminated by the trip leader or the Proprietor, as appropriate.

## **18 Exploratory visits**

An exploratory visit should be made by any learning coach/teacher who is to lead a group abroad, on a residential visit or in a location that is not familiar to them so that they can gain first-hand knowledge of the area and facilities. This knowledge will then inform the risk assessment and pre-planning. Any costs incurred while making an exploratory visit can be included in the total cost of the visit. Some contractors (providers), e.g. school travel specialist companies, may offer a pre-visit for the trip leader free of charge. This can enable the trip leader to gain a direct experience of the venue and environment and assist their appraisal of the contractor's risk assessment. An Accommodation Checklist and an Attraction Checklist are shown in Appendix 2.

If it is not possible for the teacher to visit the site/area beforehand, the trip leader must make every effort to collect all appropriate information. They **must** be able to satisfy both the EVC and the Proprietor that these alternative arrangements are sufficient for a risk assessment to be made.

Should it not be possible for the trip leader to make an exploratory visit, a reconnaissance visit should be made upon arrival at the venue, while the rest of the group remain in a secure place or are supervised by other staff in an activity for which a risk assessment has been made. If using the facilities of a contractor, e.g. school travel specialist company, the trip leader should also arrange a meeting with the local representative or manager in order that both parties can be kept fully informed and any concerns can be raised. Any points discussed should be noted in writing.

## **19 Visits abroad**

In addition to all other advice contained in this document, visits abroad should include at least one adult with the ability to speak and read the language of the visited country.

### **19.1 Individual passports**

All adults **must** hold a valid individual passport. It must be noted, however, that some countries may not allow in a traveller whose passport will expire within a few months of entry. The trip leader should check the passport details of all adults to reduce the risk of anyone being refused entry. Should any student be travelling using an individual passport, similar checks must be made. Details for individual countries can be obtained by contacting the UK embassy or consulate of the relevant country or the UK Passport Agency. Should colleagues need assistance in this matter, please see the EVC

### **19.2 Collective passports**

A collective passport can be held for between five and 50 students of British nationality. Students who do not have British nationality **cannot** be included, nor can adults who do not have British nationality. Both the trip leader and the deputy leader should be named on the document.

A collective passport application can now be made online, and this is recommended by the UK Passport Agency. The collective passport application form can be downloaded at <http://www.passport.gov.uk>

Advisory notes relating to its completion can also be found on the UK Passport Agency website. The completed form can be submitted by email. However, a hard copy, signed by the trip leader and deputy leader, must also be sent, along with the ID cards and accompanying documentation, but submitting an electronic version will speed up the application, especially if alterations have to be made.

ID cards cannot be downloaded and, therefore, still need to be obtained from the Area Passport Agency Office.

A collective passport questionnaire (born in the UK) form is issued by the UK Passport Agency and **must** be submitted with the hard copy of the collective passport application. Should a student have been born outside the UK, a different collective passport questionnaire (born outside the UK) form is required.

The passport supporting letter must now include the total number of students included on the collective passport application.

When arranging collective passports, Care Orders and Wards of Court must be taken into account. The Proprietor should be able to advise you of any students so affected. If a student is subject to a Care Order, foster parents will need to ensure that the Social Services department consents, in writing, to any proposed trip. If a student is subject to a Ward of Court, the Proprietor should seek advice from the court in relation to trips abroad, in writing, well in advance of the proposed trip. For both students subject to Care Orders and those subject to Wards of Court, a copy of the consent should be made available to the trip leader and should be taken on the trip in the event of any immigration problems. A copy must also be submitted when applying for the collective passport.

When participating in an exchange visit, each student should hold a photocopy of the collective passport and their individual ID card in their place of residence.

### **19.3 Visa exemption**

Students who are not nationals of an EU country will need to travel using their own passport and will normally require a visa to travel to another EU country. However, the School can apply for visa exemption on behalf of the students. Details of visa exemption can be obtained from the Home Office or British Council. Should colleagues need assistance in this matter, please see the EVC.

### **19.4 Customs allowances and prohibited items**

*A Customs Guide for Travellers entering the UK* leaflet gives advice about customs allowances when travelling both within and outside the EU. It also details prohibited and restricted goods. The leaflet is available in unlimited quantities via HM Customs and Excise National Advice Service, telephone 0845 010 9000.

### **19.5 Terrorism**

Should you have any concerns about terrorism, up-to-date advice is available from the Foreign and Commonwealth Office on their website, [www.fco.gov.uk/knowbeforeyougo](http://www.fco.gov.uk/knowbeforeyougo)

and from the Home Office on their website, [www.homeoffice.gov.uk](http://www.homeoffice.gov.uk)

It must be remembered, however, that there are often exceptions in insurance policies for claims under terrorism, unless there is specific advice from the Foreign and Commonwealth Office **not** to travel.

### **19.6 Travel advice**

Should you have any concerns about travelling to a particular country, up-to-date travel advice is available from the Foreign and Commonwealth Office on their website, [www.fco.org.uk/knowbeforeyougo](http://www.fco.org.uk/knowbeforeyougo)

Once again, it must be remembered that there are often exceptions in insurance policies for claims under refusal to travel unless there is specific advice from the Foreign and Commonwealth Office **not** to travel.

## 19.7 Exchange visits

Detailed guidance is now available in a document by the Outdoor Education Advisers' Panel entitled *Young People's Exchange Visits*. This document is endorsed by many local authorities and includes detailed advice and procedures including the need for CRB disclosures and reciprocal checks. General advice, however, is that relevant checks need to be carried out on the families hosting the home stay. This means the following

- Enhanced DBS checks for British families. If there is a cost implication, since the measure is to protect British students, it is not unreasonable to pass the cost of such a check to parents as part of the cost of the visit
- A relevant check for reciprocating families in the country to be visited. Where equivalent checks do not exist, in general the head of the receiving establishment will be requested to verify that to the best of their knowledge, hosts are suitable
- If satisfactory evidence cannot be ascertained, or if hosts refuse to supply the information, the visit should **not** continue

## 20 Using activity and adventure centres

Party leaders should have read DfE guidance when planning the visit.

The centre will be responsible for ensuring the safety of the pupils during activities organised and supervised by centre staff. For additional advice, see DfE guidance.

The Activity Centres (Young Persons' Safety) Act 1995 makes provision for the regulation of centres and providers of facilities where children and young persons under the age of 18 engage in adventure activities, including provision for the imposition of requirements to safety. This Act is implemented by the Adventure Activities Licensing Regulations 1996. The Act does not extend beyond Great Britain, so adventure centres abroad, even if provided by a British travel company, are not within the scope of these Regulations.

The Act requires any provider of named adventurous activities (known as 'in scope' activities), covering over 20 main activities under the broad headings of Climbing, Caving, Trekking and Water Sports, to hold a licence. The Adventure Activities Licensing Authority (AALA) provides this licence, on behalf of the DfE, after a satisfactory inspection. The aim of the adventure activities licensing scheme is to give assurance that good safety management is being followed, so that young people can continue to have opportunities to experience exciting and stimulating activities outdoors, while not being exposed to avoidable risks of death and disabling injury.

It is important for any teacher to check whether a provider is licensable and, if so, holds a licence, before arranging to use adventure facilities. An activity provider is required by the terms of the licence to display the licence at the centre or have available the licence for inspection at any reasonable time. Any licence holder referring to the holding of a licence **must** state the adventurous activities covered by the licence and give the telephone number of the Licensing Authority.

To date, over 1000 providers hold licences, but not all providers have to hold licences. Holding a licence simply means that the provider has been inspected and complies with the criteria for the AALA. A list of licensed activity centres can be obtained from AA website, [www.aala.org.uk](http://www.aala.org.uk)

The activity centre licence number, if appropriate, is required for Form EV1.

The trip leader should also check the provider's arrangements for those elements not covered by the licensing scheme, e.g. accommodation, catering, supervision and recreation during the evenings and between adventurous activities. Trip leaders and teachers retain overall responsibility for young people **at all times** during adventurous activities, even when the group is under instruction by a member of the provider's staff.

Everyone, including the students, must have an understanding of the roles and responsibilities of the School staff and the provider's staff. Trip leaders and other responsible adults should intervene if they are concerned that the students' safety may be at risk.

Staff members are strongly advised to only use licensed activity centres. In rare cases, where the use of an unlicensed centre appears to be the only option, a checklist is included in Appendix 2.

Most reputable UK adventure centres that are outside the scope of licensing are members of the British Activities Holiday Association (BAHA), and are subject to their code of practice and inspection. Details of their members can be found on the BAHA website, [www.baha.org.uk](http://www.baha.org.uk).

## 21 Swimming

The following passage is taken from the HASPEV guidance:

**Swimming and paddling or otherwise entering the waters of river, canal, sea or lake should never be allowed as an impromptu activity. The pleas of children to be allowed to bathe – because it is hot weather, for example, or after a kayaking exercise – should be resisted where the bathing has not been prepared for. ‘In water’ activities should take place only when a proper risk assessment has been completed and proper measures put in to control the risks.**

The activities should be formal and supervised.

**It is good practice that, wherever possible, group leaders seek out recognised bathing areas that have official surveillance i.e. qualified lifeguard cover. But, even then, trip leaders should be aware that students might mingle with members of the public and be lost to view. Students should always be in sight and in reasonable reach of their supervisors.**

- A member of the team **must** be suitably qualified in life saving. For outdoor activities, e.g. pond, lake, river, sea, this **must** be a life-saving qualification for open water
- One adult **must** always stay out of the water for better surveillance
- It is recommended that leader: young person ratio of 1:20 should not be exceeded
- Additional measures must be taken if the swimming is in the sea or other natural waters. Paddling in open water is categorised as swimming
- The activities **must** be formal and closely supervised

All participants involved in water activities must be confident in water. The ability to remain calm on sudden immersion is of greater importance than the ability to swim a prescribed distance. A combination of water confidence and proven swimming ability, however, is highly desirable.

Should your visit or activity include swimming or paddling it is vital that you read both Part 3 of the supplements to HASPEV and the leaflet ‘Group Safety at Water Margins’ – copies are available from the EVC.

## 22 Insurance

### 22.1 Travel insurance

Travel insurance must be taken out for all trips lasting more than one day. Where a travel company is used, it may be preferable to take out insurance through the travel company. There is never any need for the school to take out dual insurance.

Details of insurance must be given to parents.

### 22.2 Personal accident

As travel insurance is not usually required for day trips, staff or students who suffer an injury which is not attributable to the negligence of the school or a third party while on such a visit will NOT be covered.

## 23 Finance

All monies collected and spent must be carefully recorded and, after the visit, accounts must be audited. It is therefore imperative that all monies received for educational visits are paid into school accounts. Paying-in slips usually should be available for this purpose.

Receipts should be issued for all monies received. If payment is received by cheque, please write the name and group of the student and name of visit/activity on the back of the cheque before paying it to the school account. Such information will be of immense use in the event of the cheque 'bouncing'. All financial records, including receipt books, must be kept for a minimum of six years.

It is important to point out that, should you agree to collect monies, you are responsible for it while it is in your possession and safekeeping. If any of it is lost or stolen or cannot be accounted for, you will be expected to make good the deficit. Your professional association may also provide some insurance cover in this respect, but such cover is usually very limited.

On no account should monies be held for direct payment for services received in connection with a visit. All outward payments, however small, must be made through the school. However, should petty cash be required for a visit, this can be supplied by the school when at least one week's notice should be given or, for foreign currency, two weeks' notice.

While on a visit, a careful record must be kept of all monies spent using the Petty Cash form, with invoices for each spend.

**To allow the school to recover VAT charges, a VAT receipt bearing the venue VAT number and the amount or rate of VAT paid must be obtained.** Upon return from the visit, the completed Petty Cash form along with invoices, receipts and unused cash, should be returned to the school office.

On no account should teachers put money received for educational visits into their personal bank account, even for a short period.

## 24 First-aid provision

A travelling first-aid kit should be taken and the trip leader should be trained in basic first-aid procedures (see the First Aid Policy). If another accompanying member of staff is trained, the Proprietor may agree that this is adequate.

First-aid provision must be made for all off-site activities, including day, residential and home-stay visits. It is strongly recommended that one competent adult is delegated the responsibility for first aid and this fact should be known to all students and other supervisors. **On residential visits and foreign visits, at least one adult must hold a valid first-aid certificate.** On any kind of visit, the nominated person should have a good working knowledge of first aid appropriate for the level of activity to be undertaken.

In the absence of a parent, a teacher **must** accompany any student requiring medical treatment.

Since there are times when the first-aid kits are in great demand, it is important that they are returned as soon as possible after completion of the off-site visit. On return, the EVC or person responsible for first-aid kits must be made aware of any items used, to enable replenishment of the kit to take place.

## 25 Administration of medicines

In March 2005, the DfE issued the following guidelines for staff regarding the administration of medicines

- All staff are acting voluntarily in administering medicines
- Those employees who volunteer to assist with any form of medical procedure are acting within the scope of their employment. As such, they are indemnified by the school's insurers against any legal action over an allegation of negligence, provided they act responsibly and to the best of their ability within the confines of specified training
- Students who carry their own medication **must not** distribute the medication to any other student
- If a student has a medical care plan (see the Medical Treatment Policy) a copy of this should be taken on the trip by the trip leader

## 26 Reporting of accidents/incidents

All cases of first-aid treatment, to both staff and students, must be recorded. Upon return, the school's Accident Record Book **must** be completed and any completed minor incident record sheets must be passed to the EVC for appropriate filing and any necessary further action.

For staff and adult volunteers, all accidents and incidents, including those without injury, should be reported as soon as possible to the EVC. In certain circumstances, it must also be reported to the HSE by phone and by using Form F2508 'Report of an Injury or Dangerous Occurrence'. This is a legal requirement. Further guidance on when an accident is reportable under RIDDOR can be found at the HSE website, [www.hse.gov.uk/pubns/hse32.htm](http://www.hse.gov.uk/pubns/hse32.htm)

For students, any accident or illness that necessitates medical treatment or absence from school should be reported as soon as possible to the EVC. It may also need to be reported to the HSE under RIDDOR. Again, this is a legal requirement. Further guidance on when an accident is reportable under RIDDOR can be found at [www.hse.gov.uk/riddor](http://www.hse.gov.uk/riddor).

## 27 Records of information

Copies of all letters and information relating to any school visit should be filed with the EVC. This information will be vital to reception staff and/or senior management in the event of any queries from parents or in the event of any kind of emergency. Copies should also be part of the 'information pack' the home emergency contact is provided with, in the event of information being required out of School hours.

In the light of previous tragedies involving groups from other academies/schools, it is clear that we should have detailed information to hand in the school for all participants in an educational visit. For off-site visits during normal school hours the minimum information deposited in Reception **must** be a list of the name and group of each participating student, and a list of participating adults. In the event of an emergency, School staff will be able to obtain contact information from school records. However, for all off-site visits that include time out of normal school hours, completed Forms EV1 and EV2, plus a student contact information sheet should be available. They include the recording of vehicle registration numbers and a column (\*) to indicate whether or not a person is present in the party, hence the reason for updating immediately before departure.

After final completion, a copy of the forms should be left in school Reception or, in the case of departure out of school hours, placed in an envelope and pushed through the letterbox of the main door. A copy of this information should also be left with your local contact.

It is hoped that it will never be necessary to use such information, but it is wise to be prepared. Such information will be destroyed after the group has returned from the visit.

For exchange visits, a list of participating students, along with their hosts' names and addresses, should be left in school Reception. The names of accompanying staff, along with their hosts' names, addresses and telephone numbers, should also be lodged in school Reception. Again, a copy of this information should also be left with your local contact.

## 28 Mobile phones

At the discretion of the trip leader, it is school policy that students are allowed to take mobile phones on educational visits, but they should be used for **emergency purposes only**. However, as in the school, students will be responsible for their own belongings. For personal safety reasons, students should be advised not to carry mobile phones in a prominent and vulnerable position. On trips abroad, the cost implications of making calls from abroad should also be pointed out to students.

Mobile phones, however, can be a vital lifeline on exchange visits. Staff should make arrangements whereby they can be contacted at all times when the group is not under close supervision. Each student should have the contact telephone number and should know an emergency code, e.g. a word or a phrase, to be used to indicate that there is a serious problem and help is needed.

### **29 Serious behaviour incidents and other incidents**

In the event of anything going wrong during an educational visit, including incidents of serious behaviour and near misses, the trip leader should inform the Proprietor as soon as possible by telephone, at the school during school hours and at home out of school hours. If not available the Deputy Head should be contacted. Home telephone numbers for these personnel should be included in information for staff. Key telephone numbers should also be included on the emergency procedure pocket sized laminated card.

### **30 Emergency telephone numbers**

In the event of any problems arising during the visit, such as an earlier or later return to school than published, it is important that a number is available day or night which parents can ring for information. The school telephone number should be used between 08.30 and 17.00 hours, Monday–Friday in term time, but an alternative number should be given for use out of school hours.

### **31 Student photographs**

Sets of student photographs should be provided from the school database upon request when at least two weeks' notice should be given. Such photographs may prove to be very useful for identification purposes, e.g. in the event of a student becoming lost. These are particularly useful when groups of students are going abroad.

### **32 Complaints**

All complaints are best dealt with as and when they arise. However, should the nature of the complaint be serious or such that parents do not receive satisfaction, the best course of action would be to ask parents to put the complaint in writing. The Proprietor **must** see such letters of complaint and copies should be given to the Proprietor and the EVC. All such complaints must be dealt with in accordance with the School's Complaints Procedure.

### **33 Reporting return from an off-site visit**

Upon return, the trip leader should notify both the emergency contact and the Proprietor of a safe return. A short telephone call will fulfil this requirement.

### **34 Evaluation**

Upon return, a review and evaluation should be carried out as soon as possible. A sample of the Visit evaluation form is shown in Appendix 1. A copy of the completed form should be given to the EVC within one week of your return.

Leaders should also ensure that upon completion of a visit or activity a complete file of names, addresses, insurance arrangements, contacts, procedures, etc is kept for at least three years. This information would be required in the event of any future claim arising from any incident that may occur on the visit.

The trip leader, or more usually, the member of staff responsible for petty cash/money during the visit should also complete an audit of monies spent and hand it in, with receipts and monies remaining, to the office as soon as possible.

### **35 Visit planning checklists**

It is important, for your own legal protection, that all procedures above and the appropriate forms are completed at the correct time for all out of school activities. With this in mind, two checklists have been devised – one for day trips and one for residential trips. Samples of the checklists are shown in Appendix 2.

### **36 Policy review**

This policy will be reviewed annually by the EVC, who, in turn, will report to the Proprietor. Its procedures will be monitored and reviewed annually or sooner if necessary, as a result of further guidance from the DfE.

### 37 Useful references

- Child Protection: Preventing Unsuitable People from Working with Children and Young Persons in the Education Service, DFE
- Collective Passport Application Form, UK Passport Agency, [www.passport.gov.uk/](http://www.passport.gov.uk/)
- Collective Passport Questionnaire (Born in the UK), [www.passport.gov.uk/](http://www.passport.gov.uk/)
- Collective Passport Questionnaire (Born outside the UK), [www.passport.gov.uk/](http://www.passport.gov.uk/)
- Education (Independent School Standards)(England)(Amendments) 2007
- European Health Insurance Card Application Pack, Department of Health
- Five Steps to Risk Assessment, Health & Safety Executive  
[www.hse.gov.uk/pubns/indg163.pdf](http://www.hse.gov.uk/pubns/indg163.pdf)
- Group Safety at Water Margins, DFE  
[www.teachernet.gov.uk/visits](http://www.teachernet.gov.uk/visits)
- Guidance on First Aid for Schools, DFE  
[www.teachernet.gov.uk/firstaid](http://www.teachernet.gov.uk/firstaid)
- Health Advice for Travellers, Department of Health
- Health and Safety of Students on Educational Visits (HASPEV) and its Supplements, DFE  
[www.teachernet.gov.uk/visits](http://www.teachernet.gov.uk/visits)
- Health and Safety: Responsibilities and Powers, DFE  
[www.teachernet.gov.uk/responsibilities](http://www.teachernet.gov.uk/responsibilities)
- Planning an Educational Visit, Chris Lowe, The School Travel Forum  
[www.educationaltravel.org.uk](http://www.educationaltravel.org.uk)
- Supporting Students with Medical Needs: A Good Practice Guide, DFE  
[www.teachernet.gov.uk/medical](http://www.teachernet.gov.uk/medical)

**New Direction School**

**Forms and checklists**

1. Initial approval checklist
2. Form EV1
3. Form EV2
4. Parents' letter of information template
5. Visit planning checklist
6. Parent/guardian consent form – single activities
7. Parent/guardian consent form – annual
8. Jehovah's Witness letter of consent
9. Student code of conduct
10. Visit evaluation form
11. Risk assessment form
12. Petty cash form
13. Student contact information

## New Direction School

### 1 Initial approval checklist

Some fundamental judgements have to be made by the Proprietor, to ensure that the proposed plans have addressed the key issues for educational visits and that the ethos and practice of the school is reflected. The following checklist provides a useful starting point. (All references in square brackets [ ] are to paragraphs in *Health and Safety of Pupils on Educational Visits* by the DfE.)

**Complete this checklist by placing a tick in the box, where appropriate, or by writing n/a where the statement is not applicable to this particular visit.**

- The proposed activity, duration and venues match the age, number and maturity group
- The trip leader has appropriate training, experience, qualification, organisational qualities, fitness, knowledge of the group and environment, prior experience of leading or assisting leading activity [24]
- The deputy leader is able to replace the leader, should the leader leave the School before the visit takes place
- There will be sufficient staff with moderate experience and aptitude for the proposed size of group [26]
- The target student group and size have been agreed, together with the criteria for inclusion of individual students
- There are clear principles for the choice of contracted agencies (best value)
- Specialist qualifications of School and contracted staff are appropriate [157-66; 173]
- Accommodation requirements, including fire and security, have been specified conditions of booking [195-6]
- Elements of travel have been agreed as a condition of booking [Chapter 6]
- Insurance details are agreed and summarised for parents [146; 148-50]
- Outline details have been checked and allow for contingencies
- Paying-in and accounting procedures are in place and understood [54-7]
- First hand knowledge of venues and activities will be available [49]
- A decision has been made whether or not to undertake a pre-visit [47; 48]
- Format of letters to parents has been checked with the School pro forma [see paragraphs 30, 32,110,111 in HAPSEV]
- A decision has been made to hold a parents briefing or to send out further information by letter only [paragraph 110]

**New Direction School**

**Form EV1**

The EV1 form should be used for Type B and C visits. These visits usually involve a significant financial commitment and/or involve hazardous activities. The purpose of this form is to ascertain whether the Proprietor/ Deputy Headteacher is willing to consent to the visit **before** any financial commitment is made.

Proposed visit to			
Proposed dates			
Group			
Age range		No. of students	
Group leader  (include relevant qualifications and/or previous experience of similar trips if appropriate)			
Additional staff			
Purpose of visit, educational objectives			
Itinerary			
Existing knowledge of places			
Is an exploratory visit intended?			

<b>Commercial providers to be used</b>	
Name	
Address and postcode	
Telephone no.	
Licence no. (if registered with ALAA)	
Is this provider accredited by <i>[Name]</i> Council?	

<b>Transport arrangements</b>	
Method of transport	
Is the firm on list of school's/council's approved list of contractors?	Y/N

<b>Proposed costs and financial arrangements</b>

Trip leader			
Name (block capitals)			
Signature		Date	

<b>Proprietor or EVC</b>			
I have studied the application and approval is given to proceed with detailed planning and preparation of the visit			
Name (block capitals)			
Signature		Date	

<b>Deputy I/C cover (where appropriate)</b>			
I have studied the application and approval is given for the visit to go on this date(s) and at these times			
Name (block capitals)			
Signature		Date	

Unique visit code (to be used on all documents for this activity)	
---	--

**New Direction School**

**Form EV2**

This form should only be completed once general approval has been granted based on the information contained in Form EV1.

Unique visit code	A
-------------------	---

Places to be visited											
Date of departure						Time					
Date of return						Time					
Age range	Total students				No. of girls				No. of boys		
No. of staff:	F		M		Other adults	F		M			
Names, relevant experience, qualification (if applicable), specific responsibilities of staff	Name		Experience			Qualification		Responsibilities			
Names, relevant experience, qualification (if applicable), specific responsibilities of other adults	Name		Experience			Qualification		Responsibilities			
Names of students with special educational or medical needs											

<b>Transport arrangements (including company name)</b>	
Organising company name and address (if any)	
Are they accredited?	

Insurance arrangements for all members of the group, including voluntary helpers (attach a copy of the cover provided)

Insurance cover		Policy no.	
-----------------	--	------------	--

Accommodation to be used (if applicable)

Name	
Address and telephone no.	

Detailed programme of activities (attach as a separate sheet if more convenient)

--

Details of hazardous activities and associated planning, organisation and staffing

--

Existing knowledge of places to be visited and whether an exploratory visit is intended

--

Emergency contact at School

1		Home phone	
Name			

		Mobile	
2		Home phone	
Name			
		Mobile	

- Attached is a copy of the risk assessment of the visit and any other relevant documentation e.g. letter to parents
- I will obtain parental consent and medical forms indicating that all parents have received the letter and given their approval for their child to participate – copies will be given to Head Teacher and emergency contacts
- Details of the students participating giving contact details, health/allergies, medication, dietary and other issues will be provided no less than one week before the proposed date of the visit.

Trip leader			
Name (block capitals)			
Signature		Date	

### Approval

The planning and risk management for this visit has been approved in accordance with the School's policy and procedures.

EVC	
Signature	Date

Proprietor	
Signature	Date

**New Direction School**

**Parents' letter of information template**

For Type C visits, a copy of this form, with accompanying documents (risk assessments, student information) must be given to the Proprietor via the EVC.

**Model letter**

Dear Parents,

	1	Invitation to student to join _____ School trip.
<b>Destination/Dates</b>	2	We shall be visiting _____ from _____ to _____
<b>Cost</b>	3	<p>The cost will be £_____, which will include:</p> <ul style="list-style-type: none"> <li>• accommodation in [e.g. 3* hotel/3-bedded rooms]</li> <li>• all meals [specify exceptions]</li> <li>• the following activities and visits [specify]</li> </ul> <p>Your son/daughter will need pocket money to cover the following [any meals/optional visits/nights out, etc]</p>
<b>Travel/Timing</b>	4	<p>We intend to travel by [e.g. coach to Gatwick, fly direct to Pisa and travel on local coach to Florence, where we will spend 4 nights before continuing by coach to Siena. We will return by coach to Pisa for the return flight to Gatwick, returning to School by coach]. Arrangements are being made for us by [travel agency]. We anticipate leaving School at [5.00 am] on _____ and returning at [10.30 pm] on _____. I will confirm exact times with you nearer the time, when flight times are confirmed, and let you know what procedures we have put in place for advising you of any delays to our return time.</p>
<b>Passport/Visa</b>	5	Your son/daughter will need their own passport [if there are any visa requirements, give details].
<b>Insurance</b>	6	to be completed
<b>Health</b>	7	Your son/daughter will need the following inoculations. /There are no specific health requirements for, but your son/daughter must have a form EHIC [European Health Insurance Card (application form obtainable from the Post Office) for all EC countries].
<b>Staff</b>	8	_____ and _____ will be accompanying me on the trip, which will be conducted under the School's procedures for School visits. Contact numbers will be given to you both in and in the UK before we leave. [Note. The contact numbers must enable the parent to reach the student.]
<b>Clothing/Equipment</b>	9	A recommended clothing and essentials list is enclosed.

- |                                    |    |  |
|------------------------------------|----|--|
| <b>Code of conduct</b>             | 10 | The School's code of conduct for School visits is enclosed.  |
| <b>Supervision</b>                 | 11 | [If applicable:] The students will be allowed to go out unaccompanied [explain circumstances], but will always be in groups of not less than four. Staff will be in the area in the case of difficulty. [If not:] The students will be supervised at all times by a member of staff.   |
| <b>Payment/Permission</b>          | 12 | <p>Places are limited and if you would like your son/daughter to come with us, please return the following</p> <ul style="list-style-type: none"> <li>• Money [post-dated cheques usually a good idea if instalments suggested]. This will be held in a special trip account and refunded to you if, for any reason, the School has to cancel the visit</li> <li>• The consent form, signed</li> <li>• The code of conduct, signed by you and your son/daughter</li> </ul> |
| <b>Advice of possible increase</b> | 13 | [If applicable:] Because of the variation in rate of exchange, it may be necessary to make a small increased charge. Any reduction will be passed on to you].  |

Yours sincerely,

Party leader

Note. A second letter should be written prior to departure (preferably at the time parents are invited to the meeting) to confirm these points and confirm final details.

## New Direction School

### Visit planning checklist

You only need to complete sections that apply to the type of visit you are planning. Tick any boxes on the checklist that you might need to think through for your visit.

(All references in square brackets [ ] are to paragraphs in *Health and Safety of Students on Educational Visits [HASPEV]* by the DfE)

Date of visit		Unique visit code	
---------------	--	-------------------	--

#### 1 Individual/group procedures

There is a clear rationale for who is included in the visit [87, 107]	
School records have been checked to verify any individual students needs	
Parental consent forms are checked for further individual needs [114]	
Relevant individual issues are discussed with insurers [150]	
Students and parents understand the code of conduct for the visit [88, 119]	
Contact details for parents during the visit are known [120-22, 224]	

#### 2 Travelling procedures (HASPEV Chapter 6)

Passport/Visas [214-18]	
All transport providers accredited by the City Council, to ensure safety standards [124, 126]	
Transfer procedures (between coach/ferry, comfort stops) [97]	
Food and litter arrangements	
Head count procedures [81]	
Lost students/staff procedures	
Transport delay/breakdown	
Late arrival	
Medical procedures, including travel sickness	
Stops on route	

#### 3 Accommodation

Provider accredited by appropriate body	
Sharing accommodation with others	
Floor plan of accommodation	
Grouping of students for accommodation	

Grouping and location of staff	
Fire drill and emergency evacuation – secondary exits	
Signing in and out	
Security and assistance at night	
Location of any local hazards (busy roads, crime 'hot spots')	
Pocket money arrangements	
Emergency funds	

#### **4 Daily procedures**

Code of conduct is known by students and signed by parents	
Daily routines/timetables and staff/student responsibilities	
Care of accommodation (bedroom/tents/shared areas)	
Arrangements for the storage and administration of students' medicines	
Emergency medical procedures are known	
Duty staff are agreed	
Using swimming pools at accommodation [187-9]	

#### **5 Activity procedures**

##### **5.1 All activities**

Daily weather forecast assessed against planned activities	
Plan A and Plan B cover all activity contingencies, including bad weather	
Groups and supervisors are appropriately matched	
Emergency contact with group leader	
Remote supervision is adequate	
First aid is available and medical emergency procedures are known to staff	
Staff have student lists	
Are remote supervision procedures appropriate?	
Are student numbers being checked at appropriate times?	
'Down-time' activities have been properly risk assessed	

##### **5.2 Hazardous activities**

Provider appropriately accredited/AALA licensed, etc	
Specific activity risk assessment	

Qualifications/experience of person conducting activities (LEA approved)	
Qualifications/experience of technical staff	
Handover responsibilities to activity staff	
Suitable condition of equipment	
Match of difficulty of tasks to experience and capability of group	
Clothing appropriate to activities and expected weather conditions	
Emergency evacuation plans are realistic	
Access to School staff during activities is well thought through	

**New Direction School**

**Parent/guardian consent form – single activities**

Activity/journey \_\_\_\_\_

From (time/date) \_\_\_\_\_ To \_\_\_\_\_

**1 General consent**

I agree to my son/daughter/ward (name) \_\_\_\_\_ taking part in the above visit and agree to their participation in any or all of the activities proposed.

I have ensured that my son/daughter/ward understands that it is most important for their safety and the safety of the group that rules and instructions given by the staff in charge are obeyed.

I accept that, if they do not meet the requirements as to conduct, they may be returned home, accompanied by an adult, before the end of the journey and that I will be required to bear the cost of this and/or also the cost of any loss or damage caused by my son/daughter/ward, which is not attributed to the negligence of the School or the staff accompanying the trip.

**2 Activities**

[If the journey includes activities involving water, I do/do not\* confirm that my son/daughter/ward is able to swim and consequently can/cannot\* participate in such activities. Their swimming ability is \_\_\_\_\_ metres in a heated swimming pool.]

Please indicate any other activities in which your son/daughter/ward may **not** participate

\_\_\_\_\_

\_\_\_\_\_

**3 Dietary requirements**

Please outline any specific dietary requirements for your son/daughter/ward

\_\_\_\_\_

**4 Medical**

- |    |   |              |
|----|---|--------------|
| a) | Is your son/daughter/ward prone to travel sickness?       | Bus: Yes/No* |
|    |   | Sea: Yes/No* |
|    |   | Air: Yes/No* |
| b) | Has your son/daughter/ward been away from home before?    | Yes/No*      |
| c) | Has your son/daughter/ward ever had any of the following, |              |
|    | Asthma or bronchitis?                                     | Yes/No*      |
|    | Heart condition?  | Yes/No**     |
|    | Fits, fainting or blackouts?                              | Yes/No*      |
|    | Severe headaches or migraine?                             | Yes/No*      |
|    | Anxiety or depressive tendencies?                         | Yes/No*      |
|    | Diabetes (sugar tolerance abnormalities)?                 | Yes/No*      |

- Allergies to any known drugs? Yes/No\*
- Any other allergies, e.g. material, food, medicine? Yes/No\*
- Other illness or disability not already named? Yes/No\*
- Menstrual or other gynaecological disorders? Yes/No\*

If the answer to any of the above is YES, please give details below

---

- d) Is your son/daughter/ward currently vaccinated against tetanus? Yes/No\*

Date of injection \_\_\_\_\_

Date of booster \_\_\_\_\_

- e) If your son/daughter/ward on the date of departure is receiving medication for **any** ailments, they must take a supply of tablets, etc. Please state the ailment and dosage of medication

---

Should an illness occur after this form has been handed in, **please send a letter to the trip leader explaining the necessary details.**

- f) Please give your family doctor's name, address and telephone number

Name \_\_\_\_\_

Address \_\_\_\_\_

Tel. no. \_\_\_\_\_

Son's/daughter's NHS no. \_\_\_\_\_

Is your son/daughter/ward now receiving medical or surgical treatment from your family doctor or hospital and/or have they been given specific advice to follow in emergencies?

Yes/No\*

If YES, please give details by letter and supply a doctor's letter confirming the treatment and that your son/daughter/ward is fit to travel.

- g) May your son/daughter/ward be given paracetamol? Yes/No\*

- h) Please write below any further information you feel may be of assistance to the staff in charge of the party.

### 5 Contact details

I may be contacted by telephoning the following numbers

Work \_\_\_\_\_

Home \_\_\_\_\_

My working hours are \_\_\_\_\_

My home address is \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If not available at above, please contact

Name \_\_\_\_\_

Telephone no. \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**6 Declaration\***

I undertake to inform the Proprietor as soon as possible of any change in the medical circumstances between the date signed and the commencement of the journey. I understand that the Proprietor may decide that it is not in the interest of the group that my son/daughter/ward participate if their medical condition is likely to affect their safety or the safety of the group.

While I understand that the School will use all reasonable endeavours to contact me, I agree to my son/daughter/ward receiving medical treatment, including anaesthetic, as considered necessary by the medical authorities present and that I will be responsible for any costs not covered by insurance.

I do not agree to my son/daughter/ward receiving the following medical treatment (please specify if any or delete). *Note. It is a good idea for this to be translated into the appropriate language(s) if travelling abroad.*

I agree to the above personal data being used solely for the purpose of organising this School trip and understand that it will not be retained after the trip has taken place.

Signed \_\_\_\_\_

Print name \_\_\_\_\_

Date \_\_\_\_\_

**New Direction School**

**Parent/guardian consent form – annual**

Curriculum/sports activity \_\_\_\_\_

For academic year 20\_\_\_\_/20\_\_\_\_

Student \_\_\_\_\_ Tutor group \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Postcode \_\_\_\_\_

**Telephone numbers (for emergency use only)**

Day \_\_\_\_\_ Evening \_\_\_\_\_

Date of birth \_\_\_\_\_ NHS no. \_\_\_\_\_

Family doctor \_\_\_\_\_

Surgery address \_\_\_\_\_

\_\_\_\_\_

Telephone no. \_\_\_\_\_

**Any relevant medical details and any special medical requirements**

(e.g. allergies, asthma, diabetes, epilepsy, fainting, medication or other treatment).

If none, please state NONE

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Any other information you feel we should know (e.g. vegetarian diet)**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I have read the details about the activity at the top of this form and hereby give my consent to the following

- i. my son/daughter/ward participating in the activity described
- ii. the School, in the event that it is necessary, obtaining or rendering properly qualified medical assistance to my son/daughter/ward
- iii. the School, where appropriate, administering the prescribed dose of any required medication, e.g. paracetamol, travel sickness tablets, as advised by a pharmacist.

I also acknowledge the following

\_\_\_\_\_

- i. the need for compliance with requests and responsible behaviour on their part
- ii. that in the event of serious behaviour incident before the activity, the School may refuse to take my son/daughter/ward on the activity. In the event of a serious behaviour incident during the activity, the School has the right to exclude my son/daughter/ward from the remaining part of this activity. In either case, the trip leader's decision shall be final and I shall forfeit all monies paid in respect of the activity. I also understand that I may be requested to collect my son/daughter/ward from the visit venue at my own expense in the case of serious behaviour incident
- iii. that my son/daughter/ward is competent and confident in water
- iv. that any images taken by your son/daughter/ward during the activity must be solely for your individual family's use and must not be distributed more widely. Photographs may also be taken for publicity use by the School
- v. that the Department for Education (DfE) guidance now states 'Group Leaders should ensure that transport by road has seatbelts and students wear them'. This is fully endorsed by the School and, in the event of a student refusing to wear the seatbelt, the trip leader has the right to refuse to take that student on the visit

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

*Signed by the person with legal responsibility for the student*

Print your name \_\_\_\_\_

Relationship to child, if not parent \_\_\_\_\_

**New Direction School**

**Jehovah's Witness letter of consent**

Name and address of parents

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---

---

Date \_\_\_\_\_

Name of student \_\_\_\_\_ Tutor group \_\_\_\_\_

I am writing in connection with my child's visit to \_\_\_\_\_

Date \_\_\_\_\_

As you are already aware, we are Jehovah's Witnesses and therefore CONSENT to their receiving all such necessary emergency treatment, including general anaesthesia and surgery, as the doctors treating them may, in their professional judgement, deem appropriate to maintain life.

This, however, EXCLUDES the transfusion of blood, blood components, red cells, white cells, platelets and plasma, but includes the administration of non-blood volume expanders such as saline, dextran, Haemaccel, Hetastarch and Ringers solution.

I appreciate that on educational visits such as this, staff may be asked to act *in loco parentis*, and I appreciate their care for the children. I do not, however, give my consent for the above to be overridden in any circumstances and I release the local authority, the establishment and staff acting on behalf of the establishment from any liability for any consequences resulting from such exclusion. I understand, however, that ultimately any decision in relation to the administration of medicine and/or treatment as described above may be referred by the medical practitioners concerned to the court for consideration. I further understand that if my child is aged 16 years or is younger, but deemed by the medical practitioners treating them to be competent then he or she may consent to the treatments referred to above, notwithstanding my own wishes in this regard.

I also recognise that circumstances may prevail so that \_\_\_\_\_ (student's name) Medical Card and this letter may not be available to be shown or communicated to a doctor. In this case, I release the governing body of the School and its staff from any liability regarding the consequences of this.

For your assistance, I have included a list of further emergency contacts, should we not be contactable, who will be willing to act in line with our wishes and thus removing any pressure from the establishment's representatives. I understand, however, that I cannot delegate the decision in relation to medical treatment to these persons and that the medical practitioners concerned with the treatment of my child are unlikely to treat as valid the consent (or lack of consent) of a non-parent third party.

May we also request that the staff take a copy of this letter, along with the young person's Medical Directive/Release Card with them on the visit.

Yours sincerely,\*

Mr/Mrs/Ms \_\_\_\_\_ (Print name)

Parent(s)/Guardian(s) of \_\_\_\_\_

To be signed by the person with legal responsibility for the young person.



Signed \_\_\_\_\_

Date \_\_\_\_\_

**\*Note. Where there are two parents with legal responsibility, both parents must sign this letter (below).**

Signed \_\_\_\_\_

Date \_\_\_\_\_

## New Direction School

### Student code of conduct

To be read and signed by students and parents.

All participants on any out of school activities are entitled to expect that their safety will come first.

The following code of conduct sets out the school's expectations. It is a code of conduct that ensures safety and enjoyment for all involved in these activities.

Students should do the following

- Follow the rules established at the start of each activity, without fail and **without question**
- Never leave the group, whether indoors or out, without permission from a responsible adult
- **Always** be in a group of **at least three**
- Be considerate and respectful at all times to all members of the group and the community
- Remember that they are representatives of their family, their School, their community and their country, and behave accordingly
- Be **punctual**
- Avoid inappropriate behaviour at all times
- Abide by the laws and cultures of the countries visited and comply with customs regulations
- Not purchase or consume alcohol/drugs or cigarettes or potentially dangerous weapons or fireworks
- Understand that parents will be informed as soon as is practicable of any breach of the code of conduct

I fully accept this code of conduct.

Student's name \_\_\_\_\_

Form (Block capitals) \_\_\_\_\_

Student's signature \_\_\_\_\_

This code of conduct is a partnership of trust between teacher, parent and child. If the group leader believes that the safety or enjoyment of anyone is at risk because of the behaviour or attitude of your child, your child may be banned from an activity and/or you may be required to collect your child at your own expense. In these cases, there will be no refund of monies paid.

I understand that, if required, I will collect my child from the activity at my own expense.

Student's name \_\_\_\_\_

Form (block capitals) \_\_\_\_\_

Parent's/Guardian's signature \_\_\_\_\_

Name of parent/guardian (block capitals) \_\_\_\_\_

**This form must be returned to your activity group leader by the date agreed.**

**Failure to return this form suitably signed may mean your son/daughter cannot take part in this activity.**

**New Direction School**

**Visit evaluation form**

To be completed by the trip leader after all visits.

A copy of this form must be given to the EVC.

Venue		
Purpose of visit		
Dates of visit		
Number in group	Students	Supervisors
Commercial organisation involved (if relevant)		
<b>Please comment on the following, as relevant</b>	<b>Rating out of 10</b>	<b>Comment</b>
Centre's pre-visit organisation		
Travel arrangements		
Content of education programme provided		
Instruction		
Equipment		
Suitability of environment		
Accommodation		
Food		
Evening activities		
Courier/representative		
Comments and evaluation including 'close calls' not involving injury or damage		
Signed	Date	

Group leader full name	
------------------------	--

**New Direction School**

**11 Risk assessment form**

Name of activity/visit \_\_\_\_\_ Dates of visit \_\_\_\_\_

Teacher in charge \_\_\_\_\_

Number of students \_\_\_\_\_

Number of adults \_\_\_\_\_

Place(s) of visit \_\_\_\_\_

Activity	Hazard	Students with higher than normal risk named	Control strategy

**New Direction School**

**Petty cash form**

Name of visit \_\_\_\_\_

Trip leader \_\_\_\_\_

Authorised \_\_\_\_\_

Date	Detail	Amount (£)	Balance (£)	Receipt*
	Amount requested			
	Amount returned to School			

Signature \_\_\_\_\_ (Office)

\*Please indicate with a tick if a receipt is attached.

**Note. Please ask for a VAT receipt in the UK**

**New Direction School**

**Student contact information sheet**

Name of visit \_\_\_\_\_

Date of departure \_\_\_\_\_

Vehicle registration number(s) \_\_\_\_\_

	Student name	Tutor group	Contact telephone numbers		✓
			Day	Evening	
1					
2					
3					
4					
5					
6					
7					
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**New Direction School**

**Checklists**

1. Accommodation checklist
2. Attraction checklist
3. Choosing a tour operator
4. Residential and day trip checklist
5. Parents' evening checklist
6. Unlicensed activity centre checklist

## New Direction School

### 1 Accommodation checklist

When assessing the building, it is advisable to start at the top of the building and work downwards, as one would do in the event of an emergency evacuation.

<b>Name of assessor</b>	<b>Date</b>
-------------------------	-------------

#### Operational details

Name of centre/hostel/hotel	
Address	
Telephone no.	Fax no.
Web address	Email
Name of manager	
Official Tourist Board category/rating	
Date built	Refurbished
No. of floors (inc. ground floor)	Lift(s) Y/N
No. of rooms	Total no. of beds
No. of en-suite rooms	No. of rooms with washbasin
No. of beds per room	All single beds? Y/N
What are the arrangements for accommodating separate sexes?	Can they reassure you that students <b>will not</b> share beds? Y/N
Are towels provided? Y/N	Is soap provided? Y/N
Are beds made on arrival? Y/N	Are beds to be stripped on departure? Y/N
Are rooms cleaned daily? Y/N	Refreshment facilities in rooms? Y/N
TV/radio in rooms? Y/N	Telephone in rooms? Y/N
Bar (and opening times)	Post box

Drinks machine	Food vending machine(s)
Rooms and facilities available: (eg class/disco/games/luggage/meeting/storage/TV/video)	
Is there a curfew? Y/N	If yes, at what time?
Fire risk assessment in place?	Y/N
Validity of Food Hygiene Certificate	
From	To
Validity of Gas Appliance Inspection Certificate	
From	To
Validity of Portable Electrical Appliance Inspection Certificate	
From	To
Validity of Public Liability Insurance	
From	To

**Provision for disabled guests**

Details	Yes	No	N/A	Comments
Is accommodation suitable for wheelchairs/disabled guests?				

**Location**

Type of location: (e.g. commercial/industrial/residential/rural/quiet/noisy/by main road/by railway)	
Distance to town/village centre	Distance to beach
Distance to nearest shop	Distance to bus stop
Distance to railway station	Distance to Tube/Metro
Distance to main attraction(s)	

**Grounds**

Do walls/fences, etc enclose the grounds? Y/N	Is there coach parking? Y/N
Any recreational facilities:  (e.g. barbecue/field/football pitch/netball court/outdoor seating/tennis court)	

**Fire safety**

Details	Yes	No	N/A	Comments
Is there a fire alarm?  If yes, is it automatic or manual detection?				
Are there smoke detectors in the following:  Bedrooms?  Corridors?  Public areas?				
Are there adequate fire extinguishers?  Are they in working order (weight check)?  What is the date of last check/inspection?				
Is there emergency lighting?  What is the date of last check/inspection?				
Are there adequate fire escapes?  Are they clearly labelled?  Are they clear and free from obstruction?  Are they unlocked/unlockable?  Do they open into an area from where people can easily disperse?				
Are emergency evacuation instructions (if abroad, in English) displayed in the following  Bedrooms?				

Corridors?				
Public areas?				
Are there signs (if abroad, in English) by/in lifts to ban their use in the event of fire?				
Is there adequate fire exit signage?				
Are smoke/fire retardant doors on fire escapes kept closed (except automatic closing doors linked to the fire alarm)?				
Are such doors labelled as fire doors?				
Are there clearly defined evacuation assembly points?				

### General safety and security

Details	Yes	No	N/A	Comments
Are locks on external doors of sufficient strength?				
Are there safety chains?				
Is there an entry control system?				
Is there a CCTV system?				
Have staff been checked as suitable to work with young people (CRB or equivalent check)?				
Is the reception manned throughout the day?				
If yes, if abroad, do staff speak English?				
Is the reception manned 24 hours?				
If yes, if abroad, do night-time staff speak English?				
If no, up to what time is it manned?				
Are security staff on duty at night?				
If yes, between what times?				
Where are they based?				
How can they be contacted?				

Are first-aid facilities available?  If yes, where are they located?				
Are there railings around balconies and stair landings?  If yes, are they sufficiently robust and a minimum height of 1 metre?  Are all gaps in railings less than 10 centimetres?  If no, what is the maximum gap size?				
Are off limit areas clearly signed?				
Do full length glass panels have toughened/laminated glass fitted?  If not, are anti-collision motifs fitted at adult and child heights?				
Are there any potential trip or fall hazards from the following  Windows in rooms?  Upper floor landings?  Corridors?  Stairs?				
Do lifts have internal doors?				

### Swimming pool safety

Details	Yes	No	N/A	Comments
Is there a clear non-slip access around the pool?				
Are steps providing access in and out of the pool sound and robust?				
Are pool depths clearly marked?  Are changes in depth smooth and gradual?				
Is a lifeguard present at all times when the pool is in use?				
Is diving clearly banned or restricted to a specific area with				

a water depth greater than 1.5 metres?				
Is the clarity of the water adequate so that a child could be easily seen on the bottom of the pool?				
Is the pool area illuminated at night and access securely restricted?				

**New Direction School**

**Attraction checklist**

<b>Name of assessor</b>	<b>Date</b>
-------------------------	-------------

**General details**

Name of attraction	
Address	
Telephone no.	Fax no.
Web address	Email
Name and position of contact	
Date(s) and day(s) open: M/Tu/W/Th/F/Sa/Su	
Opening times From	To
Time of last admission	Recommended length of visit
Admission costs Student      Adult	Are there any free places? Y/N  If yes, how many?
Does the visit have to be booked? Y/N  If yes, is there a booking form?      Y/N	Is there coach parking?      Y/N  If no, is there space to drop off/pick up? Y/N
Where is the point of access for School groups?  What is the route from the coach park/drop-off point?	Is there level/ramped access for disabled? Y/N  Does this lead to a different entrance?   Y/N  If yes, what is the route to this entrance?
To where and whom do you report upon arrival?	
Are there cloakroom facilities?      Y/N  If yes, where are they located?  If no, is there anywhere to store bags/coats?	Are there toilet facilities? Y/N  If yes, where are they located?  If no, where are the nearest toilets?
Do students have to be closely supervised by School staff?      Y/N  If yes, do they stipulate a maximum number per group?	

<p>Have staff been checked as suitable to work with young people (CRB or equivalent check)? Y/N</p> <p>If no, is there venue staff on each floor/in each area? Y/N</p> <p>If no, how can students summons help in an emergency?</p> <p>Is there a means of locating lost students? Y/N</p> <p>Is there a CCTV system? Y/N</p> <p>Are off-limit areas clearly signed? Y/N</p>	
<p>Are there any education facilities/resources? Y/N</p> <p>If yes, describe what is available, eg education room/film/guided tour/hands-on/talk/video/worksheets.</p> <p>If yes, are any samples/details available?</p> <p>If yes, are there any costs?</p> <p>If abroad, are education resources available in English? Y/N</p>	
<p>Are there information boards/signs? Y/N</p> <p>If abroad, are they in English? Y/N</p>	
<p>Is there a lunch room/facilities for eating packed lunches? Y/N</p> <p>If yes, does it have to be booked? Y/N</p> <p>Time(s) available</p> <p>If yes, are there any costs?</p> <p>Are there facilities to buy drinks? Y/N food? Y/N</p>	
<p>Is there a cafeteria/restaurant? Y/N</p> <p>If yes, can students use the facilities? Y/N</p> <p>If yes, do students have to be accompanied? Y/N</p>	<p>Are there first-aid facilities? Y/N</p> <p>If yes, where are they located?</p>
<p>Are emergency exits clearly labelled? Y/N</p> <p>Are assembly areas clearly identified? Y/N</p>	
<p>Is there an assembly point for use at the end of the visit? Y/N</p> <p>If yes, where is it located?</p>	
<p>Does the venue have written risk assessments? Y/N</p> <p>If yes, can you see them? Y/N</p>	
<p>Validity of public liability insurance</p>	

From	To
------	----

**Indoor attraction**

No. of floors (inc. ground floor)	Are there escalators?	Y/N
Is each floor level? Y/N	Are there lift(s)?	Y/N
If no, describe walking area.	Are there stairs?	Y/N
Are there signs (in English) by/in lifts to ban their use in the event of fire?		Y/N

**Outdoor attraction**

Do walls/fences, etc enclose the venue? Y/N	Is there shelter in the event of wet weather? Y/N
Are all entrances/exits manned? Y/N	If yes, where is it located?

**Provision for disabled visitors**

Is attraction suitable for wheelchairs/disabled guests? Y/N
--

**Any other comments**

**New Direction School**

**Choosing a tour operator**

<p><b>Reliability of the company</b></p> <ul style="list-style-type: none"> <li>● Is the company reputable?</li> <li>● How long have they been in business?</li> <li>● Can they provide names of other academies as references?</li> </ul>	
<p><b>Financial security</b></p> <ul style="list-style-type: none"> <li>● What are their bonding arrangements, e.g. SAGTA, ABTA, AITO, ATOL, trust fund, insurance?</li> </ul>	
<p><b>Availability</b></p> <ul style="list-style-type: none"> <li>● Can they provide facilities for your chosen dates?</li> <li>● How many people can they accommodate?</li> </ul>	
<p><b>Programme offered</b></p> <ul style="list-style-type: none"> <li>● Does it meet your aims and objectives?</li> <li>● Does it meet your curriculum needs?</li> <li>● Can they accommodate students with special needs?</li> <li>● Are there any parts of the programme for which you are responsible, e.g. evening activities?</li> </ul>	
<p><b>Staff</b></p> <ul style="list-style-type: none"> <li>● What are their staffing arrangements?</li> <li>● What are the qualifications of their staff?</li> <li>● Have CRB or equivalent checks been carried out?</li> </ul>	
<p><b>Transport arrangements</b></p> <ul style="list-style-type: none"> <li>● What form(s) of transport will be used?</li> <li>● Will they meet all safety requirements, e.g. seatbelts on coaches/minibuses?</li> <li>● What are the pick-up and drop-off arrangements and times?</li> <li>● Are CRB checks made for coach drivers?</li> </ul>	
<p><b>Accommodation</b></p> <ul style="list-style-type: none"> <li>● What is the type of accommodation offered?</li> <li>● Will it meet all safety and security requirements, e.g. fire evacuation</li> </ul>	

<p>procedures, fire fighting equipment, night-time security?</p> <ul style="list-style-type: none"> <li>• Does the accommodation have any relevant safety certificates?</li> <li>• What are the arrangements for accommodating separate sexes?</li> <li>• Can they reassure you that students will not share beds?</li> <li>• Can they cater for students with special needs?</li> <li>• What are the arrangements for accommodating staff?</li> </ul>	
<p><b>Catering</b></p> <ul style="list-style-type: none"> <li>• What are the arrangements for meals?</li> <li>• Are all meals included?</li> <li>• Do they cater for special diets, e.g. vegetarian?</li> <li>• What are the qualifications of their staff, e.g. food hygiene certificates?</li> </ul>	
<p><b>Insurance</b></p> <ul style="list-style-type: none"> <li>• Does the package include insurance? If so, what does the policy include?</li> <li>• What is their amount of liability insurance?</li> </ul>	
<p><b>Safety management systems</b></p> <ul style="list-style-type: none"> <li>• Have they completed the necessary risk assessments?</li> <li>• Can you see them?</li> </ul>	
<p><b>Costs</b></p> <ul style="list-style-type: none"> <li>• What is included?</li> <li>• What is not included?</li> <li>• What is the required leader: young person ratio?</li> <li>• How many, if any, staff places do they allow in the package?</li> <li>• From the eyes of a parent, is it good value for money?</li> </ul>	
<p><b>Booking terms and conditions</b></p> <ul style="list-style-type: none"> <li>• What are the arrangements for making payments?</li> <li>• What are the terms of cancellation?</li> <li>• Are there any limitations of liability?</li> <li>• What does the small print say?</li> </ul>	

<p><b>Support</b></p> <ul style="list-style-type: none"> <li>● What support do they offer, both before and during the visit?</li> <li>● Does the company have representatives?</li> <li>● If so, would the representative be willing to attend a parents' evening?</li> <li>● Is literature and display material available?</li> <li>● Do they have a video for use with students and/or parents?</li> </ul>	
<p><b>Exploratory visit</b></p> <ul style="list-style-type: none"> <li>● What arrangements are there for this?</li> <li>● What are the financial arrangements?</li> </ul>	
<p><b>Any other information</b></p>	

**New Direction School**

**Residential and day trip checklist\***

Trip destination	
Address	
Phone number	
Name of contact person	
Email address	
Date(s) of trip	
Date checked with School calendar	Y/N
Trip leader	
Deputy leader	
Other staff	
Documentation	
Date of form EV1 submission (Note 1)	
Initial approval date	
Aims and objectives defined	Y/N
Curriculum links defined	Y/N
Date of written assessment	
Circulation to EVC and visit staff	Y/N
Preliminary visit date (if new site)	
Information on area produced	Y/N
Preliminary costings obtained	Y/N
Confirmation of costs for <ul style="list-style-type: none"> <li>● Transport</li> <li>● Accommodation</li> <li>● Instructors</li> <li>● Insurance</li> <li>● Food</li> <li>● Activities</li> </ul>	Y/N Y/N Y/N Y/N Y/N Y/N

Finance officer approval date	
Completion of form EV2 date (Note 2)	
Permission to proceed received	Y/N
Bookings confirmed for all elements of the trip <ul style="list-style-type: none"> <li>• Transport</li> <li>• Accommodation</li> <li>• Insurance</li> <li>• Activities</li> </ul>	Y/N Y/N Y/N Y/N
CRB forms completed (Note 3)	Y/N
Date CRB forms submitted to office manager	
Letter to parents and copy to (Note 4) <ul style="list-style-type: none"> <li>• EVC</li> <li>• Finance officer</li> <li>• Office manager</li> <li>• Appropriate key stage manager</li> <li>• Accompanying staff</li> <li>• Staff noticeboard</li> </ul>	Y/N Y/N Y/N Y/N Y/N Y/N
Parental information meeting held	Y/N
Students invited, selected and attendees confirmed with staff	Y/N
Parents contacted regarding selection	Y/N
Trip diary and other materials prepared and duplicated	Y/N
EHIC card packs obtained (for trips abroad) and sent to parents (Note 5)	Y/N
Date for return on EHIC cards	
Collective passport/identity cards applied for	Y/N
Student photos obtained (Note 6)	Y/N
Date or receipt of passport	
Parental consent forms and codes of conduct sent out (Note 7)	Y/N
Date of return	
Photocopying of forms date	

Compilation of summary sheet including medical and dietary	Y/N
Forms circulated to staff and EVC	Y/N
School insurance obtained	Y/N
Copy to EVC, finance officer and staff (Note 11)	Y/N
Cover requirements prepared and given to supply officer (Note 8)	Y/N
First aid boxes requested (Note 9)	Y/N
Petty cash/currency/cheques requested (Note 10)	Y/N
Staff handbook prepared summarising all key details of trip, contact numbers, etc	Y/N
Copy to <ul style="list-style-type: none"> <li>● Staff</li> <li>● EVC</li> <li>● Office manager</li> </ul>	Y/N Y/N Y/N
Staff preparatory meeting date	
Emergency contact cards prepared using information above, plus contact number(s) of emergency contact (Note 12)	Y/N
Weather forecast obtained immediately prior to visit	Y/N
Detailed arrangements for organisation of trip discussed with staff	Y/N

\*Numbers in brackets refer to the following notes

#### Notes

1. Approval from the Proprietor, as appropriate, must be obtained **before the visit is advertised**. This is achieved by completing and submitting an EV1 form to the EVC.
2. Form EV2 must be sent to Proprietor via the EVC **at least two months** prior to the visit.
3. DBS disclosure forms are available from School Reception and, when completed by the 'volunteer', should be returned to the Office, **giving as much notice as possible**.
4. Letter to parents is to include the following
  - a) deadline dates for payments
  - b) to where and when payments are to be made
  - c) methods of payment
5. Collective passport forms/nationality forms/blank identity cards should be obtained **at least three months** prior to the visit. Completed forms and ID cards, along with the appropriate fee and supporting letter from the Proprietor should be returned to the passport agency **at least six weeks** prior to the visit.
6. Forms of consent and codes of conduct should be requested from colleagues in Reception **at least two weeks** before they are required.

7. First-aid kits should be requested from the appointed first aider **at least two weeks** before they are required. Details of first aid provision for off-site activities are to be found in the school policy entitled 'First Aid Provision'.
8. Foreign currency should be ordered through the school **at least two weeks** before it is required. Cash and cheques should be ordered **at least one week** before requirement.
9. Should insurance be required under the school trips/off-site activities insurance policy, the school should be notified.
10. The EVC should be able to provide a template A4 sheet and a pocket-sized card, where emergency medical and policy details for students' details for your trip can be added.

## **New Direction School**

### **Parents' evening checklist**

- Trip leader and accompanying adults, including non-teachers introduced.
- Aims and objectives and curriculum links/relevance explained.
- Duration of visit defined, including departure and return dates and times.
- Details of tour company (if applicable).
- Mode(s) of travel and name(s) of travel company/companies to be used.
- Coach travel – seating arrangements and DfE guidance relating to seatbelts.
- Name(s) and address (es) of base(s) from which group will be operating.
- Details of accommodation, including security and supervision arrangements.
- Emergency contact telephone number(s) for parental contact, including local contact.
- Details of insurance cover explained.
- Description of activities planned, including any that are hazardous, with an indication of the daily programmes.
- Times when students will not be closely supervised.
- Risk assessment explained.
- Parent responsibilities for ensuring that the students are fit to participate explained.
- Clothing and equipment requirements outlined.
- Mobile phones details (credit and cost implications when used abroad).
- Items that students should not take, purchase while on the visit or bring back.
- Luggage details given i.e. type, quantity and labelling.
- Effective means of communication explained (telephone tree) in the event of change to return time.
- Financial matters, including arrangements/responsibilities for spending money.
- Nominated person in charge of welfare/first-aid duties.
- Procedures in the event of students becoming ill/injured explained.
- Importance of consent forms to include any medical details and/or dietary requirements.
- Code of conduct explained.
- Arrangements for dealing with students behaving inappropriately, including the possibility of returning them home early.

## New Direction School

### 6 Unlicensed activity centre checklist

Name of centre \_\_\_\_\_

**Please answer as fully as possible all of the questions below and, where appropriate, attach supporting documents. Where you are unable to answer 'Yes' to any question below, please set out your reasons clearly on a supplementary sheet.**

1. Do you operate a policy for staff recruitment and training that ensures that all staff members with a responsibility for the safety and welfare of students are competent to undertake the duties to which they are assigned?

Yes/No

2. Have all staff been checked for their criminal history and are ones with an unsuitable record not employed? (Copies of CRB certificates requested for all staff.)

Yes/No

3. Do you have a clear 'chain of command and management'? (Please attach full details.)

Yes/No

4. Are those who are responsible for managing particular activities suitably competent and qualified? (Please attach details of names, qualifications and experience of each person involved in managing activities.)

Yes/No

5. a) Do you have written procedures for activities offered with which all your staff are familiar?

Yes/No

b) Do such procedures lay down competencies, qualifications and experience required?

Yes/No

6. Are you registered with a national governing body relevant to the activities offered at your centre? If so, which body/bodies?

Yes/No

7. Are your centre staff in possession of appropriate NGB qualifications, enabling them to undertake the relevant training programmes for students?

Yes/No

If not, has staff competence been satisfactorily assessed to the satisfaction of persons qualified with the NGB?

Yes/No

8. Can you guarantee that each group of participants will have ready access to a responsible person with a recognised first-aid qualification and that first-aid provision fully meets current legislation?

Yes/No

9. Can you guarantee sufficient and correctly sized equipment suitable for the purpose intended?

- Yes/No
10. Is such equipment subject to regular checks and will it be fully checked before use by our own party?
- Yes/No
11. Do you have written accident, fire and emergency procedures with written records of all accidents? Are all staff members suitably practised and competent in such procedures?
- Yes/No
12. Do you have public liability, product and third party insurance? (Please forward copies of current certificates in this respect.)
- Yes/No
13. Can you guarantee that all of your accommodation meets the regulations imposed in the current Education Premises Act (1996)?
- Yes/No
14. Apart from any tent accommodation, mountain hut accommodation, etc, does your main centre have adequate provision for the storage of clothes and equipment?
- Yes/No
15. Are there washbasins with hot water in the ratio of 1:10 participants?
- Yes/No
16. Is there adequate heating with adequate ventilation in sleeping areas?
- Yes/No
17. Do all bedroom and bathroom areas have opaque blinds, curtains or equivalent?
- Yes/No
18. Is there adequate lighting?
- Yes/No
19. Is there provision for the storage of equipment and for the drying out of clothes?
- Yes/No
20. Can valuables be kept in a safe place?
- Yes/No
21. Are there baths or showers in the ratio of 1:15 students and toilets in the ratio of 1:10?
- Yes/No
22. Is there at least 76.2 centimetres (30 inches) between each set of bunks/each bed?
- Yes/No

23. Do all areas meet and exceed current fire safety regulations?

Yes/No

24. Do all appropriate areas have appropriate fire access, which meets current fire-safety regulations?

Yes/No

Signature \_\_\_\_\_

Position \_\_\_\_\_

Date \_\_\_\_\_

Contact details \_\_\_\_\_

Centre telephone \_\_\_\_\_

Mobile phone \_\_\_\_\_

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

**Accompanying certificates**

Recorded DBS certificate number for all staff

Centre insurance certificate

Fire safety certificate

First-aid certificate

Insurance and MOT certificates (If centre transport to be used)

## Responsibilities

1. The Head Teacher
2. EVC
3. Trip/Group leader

### 1 The Head Teacher and/or the educational visits coordinator

All establishments **must** have a member of staff specifically trained in the conduct of off-site visits. This takes the form of EVC training. It is the responsibility of the Proprietor to ensure that if the trained person leaves someone else undertakes the training as soon as possible.

Responsibility within the School for the approval of visits remains with the Proprietor but they may delegate these tasks to the EVC.

The Proprietor should be clear about their own role if taking part in the visit as a group member/supervisor. They should follow the instructions of the group leader who will have sole charge of the visit.

The responsibilities ensured by the Proprietor (and/or EVC, if tasks are so delegated) can be summarised as follows

- Visits comply with regulations and guidelines provided by the School and the Health and Safety Policy
- The trip leader is competent to monitor the risks throughout the visit
- Adequate child protection procedures are in place
- All necessary actions have been completed before the visit begins
- Risk assessment has been completed and appropriate safety measures are in place
- Training needs have been assessed by a competent person and the needs of the staff and students have been considered
- The trip leader has experience in supervising the age groups going on the visit and will organise the group effectively
- The trip leader or another supervisor are suitably competent to instruct the activity and is familiar with the location/centre where the activity will take place
- Trip leaders are allowed sufficient time to organise properly
- Volunteer staff on the visit are appropriate people to supervise children
- The ratio of leader: young people is appropriate
- Parents have signed consent forms
- Arrangements have been made for the medical and special educational needs of the young people
- Adequate first-aid provision will be available
- The mode of travel is appropriate
- Travel times out and back are known, including pick-up and drop-off points
- There is adequate and relevant insurance cover
- They have the addresses and phone number of the visit's venue(s) and have contact names
- A home-based contact has been nominated and the trip leader has details
- The trip leader, group supervisors and home-based contact have copies of agreed emergency procedures
- The trip leader, group supervisors and home-based contact have the names of all adults and young people travelling in the group, and the contact details of parents and the teachers' and other supervisors' next of kin
- There is a contingency plan for any delays, including a late return home

In addition, the Proprietor should do the following

- Agree the procedure for the approval of a visit at school level
- Ensure that arrangements are in place for the educational objectives of a visit to be inclusive, to be stated in the pre-visit documentation, and to be made known to all relevant parties
- Be aware of the need to obtain best value. Appropriate consideration must be given to financial management, choice of contractors and contractual relationships
- Ensure that issues identified by exploratory visits have been satisfactorily resolved within the risk assessment
- Ensure that the accreditation or verification of providers has been checked
- Ensure that visits are evaluated to inform both the operation of future visits and to inform training needs. Further staff training should be made available where a need is identified
- Ensure that there is a contingency plan (Plan B), covering for example the implications of staff illness and the need to change routes or activities during the visit (see below)
- Arrange for the recording of accidents and the reporting of death or disabling injuries, as required. Accident and incident records should be reviewed regularly, and this information used to inform future visits
- Help to ensure that serious incidents, accidents and near accidents are investigated
- Ensure teachers are made aware of and understand guidance on emergency planning and procedures. Training and briefing sessions must be provided for staff
- Ensure that the School has emergency procedures in place in case of a major incident on ventures. These should be discussed and reviewed by staff. Ensure that young people, parents, group supervisors and others are given written details of these procedures
- Ensure that the home-based contact has the authority to make significant decisions. They should be contactable and available for the full duration of the visit 24 hours a day. They should be able to respond immediately at the establishment base to the demands of an emergency and should have a back-up person or number
- Establish a procedure to ensure that parents are informed quickly about incident details through the home-based contact, rather than through the media or students
- Check that contractors have adequate emergency support procedures, and that these will link to establishment emergency procedures
- Be aware of the implications of the Disability Discrimination Act and the Equality Act, namely that there is a legal requirement not to discriminate on the grounds of disability and that the planning duty applies for all school activities which includes off site visits

Where an EVC is identified or appointed, the Proprietor should also do the following

- Delegate tasks to the EVC, having regard to the duties of the EVC suggested earlier in this part of this document
- Ensure that the EVC keeps them informed of the progress of any visit and that this information is relayed to local governors (and to parents as necessary). For less routine visits, the Head Teacher will need to ensure that the EVC can obtain advice from an appropriate technical adviser as necessary
- Make time available for the EVC to arrange for the induction and training of staff and volunteers and ensure that staff receive the induction and training that they need before the visit
- Ensure that the EVC briefs the leader and supervisors about the emergency procedures as part of the risk assessment briefing and that the leader and supervisors have ready access to them during the visit
- Ensure that the EVC impresses upon parents the importance of providing their own contact numbers (more than one), which will enable the parents to be contacted in case of emergency

### 3 Educational visits coordinator

All establishments **must** have an EVC. The EVC will be appointed by and act on behalf of the Proprietor. The EVC will be specifically trained via attendance on an EVC training course. If the existing EVC leaves the School, a replacement must attend the next available course.

The functions of the EVC are to do the following

- Assist with the assessment of the competence of trip leaders and other adults proposed for a visit. This will commonly be done with reference to accreditation from an awarding body. It may include practical observation or verification of experience
- Organise the training of trip leaders and other adults going on a visit. This will commonly involve training, such as first aid and hazard awareness
- Organise thorough induction of trip leaders and other adults taking students on a specific visit
- Make sure that DBS disclosures are in place, as necessary
- Work with the trip leader to obtain the consent or refusal of parents and to provide full details of the visit beforehand, so parents can consent, or refuse consent, on a fully informed basis
- Ensure that trip leaders are aware of the emergency arrangements and ensure there is an emergency contact for each visit
- Keep records of individual visits, including reports of accidents and 'near accidents' (sometimes known as 'near misses'). Report near misses to the Outdoor Education Advisor as soon as possible
- Review systems and, on occasion, monitor practice

### **3.1 Competence of the educational visits coordinator**

The member of staff designated as the EVC should be specifically competent. Evidence of competence may be through qualification and/or the experience of practical leadership over many years of outdoor education.

## **4 Trip leaders**

Leaders have the responsibility to oversee the preparation and execution of the visit and to ensure that safety is the prime concern. The leader in charge of any visit is the responsible adult who needs to plan and prepare for the activity, and to prepare any emergency and contingency plans which, as official records, should be left with the establishment. The leader, and all other responsible adults, should be familiar with all the advice contained in the school's code of practice and with emergency planning arrangements and Crisis Line. The leader is also responsible for briefing all accompanying staff, supervisors, parents and helpers.

**One person – the trip leader – must have overall responsibility** for the supervision and conduct of the visit and should have regard to the health and safety of the group. The Head Teacher or the governing body should approve the trip leader.

The trip leader should do the following

- Obtain the Proprietor's prior agreement before any off-site visit takes place
- Follow DfE and other governing body regulations, guidelines and policies
- appoint a deputy
- Wherever possible, at least one formal briefing meeting should be arranged for the whole adult team prior to the visit, whereby the leader should ensure that everyone is familiar with and supports the visit's objectives
- Conduct an exploratory visit in order to undertake a proper risk assessment
- Clearly define each group supervisor's role and ensure all tasks have been assigned. Ensure that everyone is aware of and accepts the nature of the particular responsibilities and roles they will assume and that they are advised of their position with regard to personal responsibility
- Be able to control and lead students of the relevant age range
- Be suitably competent to instruct students in an activity and be familiar with the location/centre where the activity will take place
- Ensure that adequate first-aid provision will be available
- Undertake and complete the planning and preparation of the visit, including the briefing of group members and parents

- Undertake and complete a comprehensive risk assessment for aspects of the trip for which they have responsibility. Ensure all accompanying adults have copies of relevant risk assessments
- Review regularly undertaken visits/activities and advise the Head Teacher where adjustments may be necessary
- Ensure that teachers and other supervisors are fully aware of what the proposed visit involves
- Have enough information on the students proposed for the visit to assess their suitability or be satisfied that their suitability has been assessed and confirmed
- Ensure the ratio of supervisors to students is appropriate for the needs of the group
- Consider stopping the visit if the risk to the health or safety of the students is unacceptable and have in place procedures for such an eventuality
- Ensure that group supervisors have details of the home-based contact
- Ensure that group supervisors and the home-based contact have a copy of the emergency procedures
- Ensure that the group's staff and other supervisors have the details of young peoples' special educational or medical needs which will be necessary for them to carry out their tasks effectively
- Wherever possible on a visit or activity, rendezvous arrangements with an appropriate place and time are agreed should the party become separated. These would be best made on arrival at particular locations where possible so that suitable locations can be identified
- An additional recommended safety precaution is to ensure that every member of the group knows in advance the course of action to follow if they get lost. Depending on the nature of the journey or activity, the course of action may be to stay still, make their way back home or to a base, seek appropriate help or directions, or return to a particular rendezvous spot identified previously
- The leader must brief all the young persons about their tasks, arrangements, organisation and the behaviour that is expected of them during the time of the visit
- **The trip leader should ensure that all accompanying adults are familiar with the safeguarding policy and procedures**
- During the visit a brief daily staff meeting at the start of the day is strongly recommended
- Securing at all times the safety and welfare of the young persons in their charge
- Planning and organising the activity as appropriate
- Having a 'Plan B' fully risk assessed and organised as a backup if leading activities
- Establishing regulations and procedures for safe practice of the visit
- Communicating information to all interested parties on, during and after the visit
- Ensuring that other assistants and adults carry out their duties and responsibilities safely and responsibly

Whenever a party is to be subdivided, or the leader is to be absent for any reason, the party leader should make a clear delegation of responsibility to another adult. If a trip leader delegates responsibility for the supervision of some, or all of the young persons, at various times to other members of the staff team, they must satisfy themselves that this individual to whom they are delegating responsibility is as follows

- Is competent to take charge of the group of young people undertaking the particular activity in this locality
- Has been fully and properly briefed as to their role and responsibilities
- Is aware of the next meeting place and time and is fully conversant with the procedure to adopt in the event of an accident or emergency arising within the party

The trip leader must ensure that at all times during the visit or activity, each member of staff knows exactly for which young people they have a responsibility and where those young people are at all times, and that each young person knows who the leader of their particular group is.

## A handbook for group leaders

### (Known in this policy as trip leaders.)

This is Part 3 of a three part supplement to *Health and Safety of Pupils on Educational Visits: A Good Practice Guide (HASPEV)*. See also *HASPEV; Health and Safety: Responsibilities and Powers*; and the other parts of this supplement: *Standards for LEAs in Overseeing Educational Visits and Standards for Adventure*

### Introduction

The purpose of this handbook is to provide practical information that might be helpful to group leaders and others, day to day, while taking part in an educational visit. It adds to and brings together in one place, the advice for group leaders that is spread throughout the Good Practice Guide *Health & Safety of Pupils on Educational Visits (HASPEV)*. It does not cover planning arrangements before the visit, which can be found in *HASPEV*.

The handbook is not a substitute for training. We recommend that all group leaders have access to training before taking pupils on educational visits.

The handbook does not seek to replace local or other professional guidance or regulations. Community and voluntary controlled schools should follow LA guidance as a first recourse. No guidance should be taken as an authoritative interpretation of the law. That is for the courts.

The handbook includes advice on supervision, ongoing risk assessment, emergency procedures, and some specific types of visit. The printed version of the handbook will be in loose-leaf style, which will allow for easy amendment when new information comes to light and for additional pages to be added on new topics.

Like *HASPEV*, the supplement can be adopted or adapted by LEAs or others for their own purposes. Please acknowledge the Department as the source for any such use and declare any local variation of the text.

Enquiries about the contents of this Supplement should be addressed to the Department's Pupil Health and Safety Team on 020 7925 5536.

## 1 Supervision

HASPEV Chapter 3 and *Standards for Adventure* give advice on supervision ratios, vetting suitability of supervisors and brief advice on responsibilities, competence, head counts and remote supervision. This section aims to give more practical advice on supervision 'in the field'.

### 1.1 Responsibility

The group leader is responsible overall for the group at all times. In delegating supervisory roles to other adults in the group, it is good practice for the group leader to;

- Allocate supervisory responsibility to each adult for named pupils
- Ensure that each adult knows which pupils they are responsible for
- Ensure that each pupil knows which adult is responsible for them
- Ensure that all adults understand that they are responsible to the group leader for the supervision of the pupils assigned to them
- Ensure that all adults and pupils are aware of the expected standards of behaviour

It is good practice for each supervisor to

- Have a reasonable prior knowledge of the pupils including any special educational needs, medical needs or disabilities
- Carry a list/register of all group members
- Directly supervise the pupils (except during remote supervision) – particularly important when they are mingling with the public and may not be easily identified
- Regularly check that the entire group is present
- Have a clear plan of the activity to be undertaken and its educational objectives
- Have the means to contact the group leader/other supervisors if needing help
- Have prior knowledge of the venue – the group leader should normally have made an exploratory visit, see *Standards for LAs in Overseeing Educational Visits*
- Anticipate a potential risk by recognising a hazard, by arriving, where necessary, at the point of hazard before the pupils do, and acting promptly where necessary
- Continuously monitor the appropriateness of the activity, the physical and mental condition and abilities of the group members and the suitability of the prevailing conditions
- Be competent to exercise appropriate control of the group, and to ensure that pupils abide by the agreed standards of behaviour
- Clearly understand the emergency procedures and be able to carry them out
- Have appropriate access to First Aid

Each pupil should

- Know who their supervisor is at any given time and how to contact him or her
- Have been given clear, understandable and appropriate instructions
- Rarely if ever be on their own
- Alert the supervisor if someone is missing or in difficulties
- Have a meeting place to return to, or an instruction to remain where they are, if separated
- Understand and accept the expected standards of behaviour

### 1.2 Head counts etc

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

- Carry a list/register of all pupils and adults involved in the visit at all times
- Ensure that pupils are readily identifiable, especially if the visit is to a densely populated area. Brightly coloured caps, T-shirts or a school uniform can help identify group members more easily

- Avoid identification that could put pupils at risk e.g. name badges (though some schools find it useful to provide pupils with badges displaying the name of the school or hotel and an emergency contact number, or for visits abroad a note in the language of the country being visited)
- Ensure that all pupils are aware of rendezvous points
- Ensure that all pupils know what to do if they become separated from the group

### 1.3 The 'buddy' system

Each child is paired with a buddy. Each regularly checks that the other is present and is OK. A variant of this is the 'circle buddy' system – the pupils form a circle at the start of the visit so that each pupil has a left side buddy and a right side buddy. He or she will check on these when asked. Thus two pupils cannot vanish together and not be missed (as might happen with paired buddies).

### 1.4 Remote supervision

Supervision can be close or remote, but is always 24 hours

- Close supervision occurs when the group remain within sight and contact of the supervisor
- Remote supervision occurs when, as part of planned activities, a group works away from the supervisor, but is subject to stated controls (eg during certain Duke of Edinburgh's Award expeditions). The supervisor is present though not necessarily near or in sight, but his or her whereabouts are known
- Down time (or recreational time) – for example during the evenings – may involve close or remote supervision, but should not be unsupervised – the supervisors continue to be in charge
- It is essential that everyone involved in the visit understands the supervision arrangements and expectations

When supervision is remote

- Groups should be sufficiently trained and assessed as competent for the level of activity to be undertaken, including first aid and emergency procedures. Remote supervision will normally be the final stage of a phased development programme
- Pupils will be familiar with the environment or similar environments and have details of the rendezvous points and the times of rendezvous
- Clear and understandable boundaries will be set for the group
- There must be clear lines of communication between the group, the supervisor and the school. Do not rely exclusively on mobile phones
- The supervisor should monitor the group's progress at appropriate intervals
- The supervisor will be in the expedition or activity area and able to reach the group reasonably promptly should the group need support in an emergency
- There should be a recognisable point at which the activity is completed
- There should be clear arrangements for the abandonment of the activity where it cannot be safely completed

### 1.5 Rearranging groups

Potential danger points can occur when rearranging groups. In particular

- When a large group is split into smaller groups for specific activities
- When groups transfer from one activity to another and change supervisor
- During periods between activities
- When small groups re-form into a large group

It is therefore important that the supervisor

- Clearly takes responsibility for the group when their part of the programme begins, particularly making certain that all group members are aware of the changeover

- Clearly passes on responsibility for the group when their part of the programme is concluded, together with any relevant information ensuring that the group members know who their next leader is

### 1.6 Down time

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

It is good practice to

- Ensure that all staff and pupils understand the standards of behaviour that apply at all times, not just during activities
- Ensure that handover between activities is properly supervised, with a named supervisor responsible for the group if there is down-time between activities
- Ensure that all supervisors understand that their supervisory role continues in the evening – however hard a day it has been, that it is not a time to relax in the bar or in front of the TV
- Use down-time in the evening or at the beginning of the day to brief the group on the planned activities for the day to come, e.g. the planned learning outcomes, specific health and safety issues, meal and break times etc
- Use down time after activities for individual reflection on personal learning outcomes, and group discussion about the highs and lows of the day
- Apply the advice contained in 'Remote Supervision' above, adapted as necessary, if it is felt reasonable to allow pupils some time without close supervision
- Occupy the group with mildly active, non-academic activities in the evening, e.g. craft activities, environmental activities, quizzes, team challenges, led-walks

### 1.7 Night time

Group leaders should ensure that

- The group's immediate accommodation is exclusively for the group's use
- Teachers (of both genders where appropriate) have sleeping accommodation on the same floor immediately adjacent to the pupils' accommodation
- There is a teacher present on that floor whenever the pupils are there
- Child protection arrangements are in place to protect both pupils and staff
- Where hotel/hostel reception is not staffed 24 hours a day, security arrangements should be in force to stop unauthorised visits
- In the absence of 24 hour staffing of reception, external doors must be made secure against intrusion and windows closed as necessary to prevent intrusion
- Where possible, internal doors are lockable, but staff must have reasonable access to the pupil accommodation at all times
- Where pupils' doors are locked, teachers have immediate access, as necessary, to a master key
- All staff and pupils know the emergency procedures/escape routes in the event of a fire. Where windows and doors are locked against intrusion at night, ensure that alternative escape routes are known and that all fire doors function properly

Don't be lulled into a sense of false security by local assurances, such as 'no need to lock doors in this part of the country'. The presence of the group may attract unwelcome attention that is unusual in the locality.

### 1.8 Travel

A driver cannot safely drive and supervise children at the same time. Group leaders should ensure that

- Transport by road has seatbelts and that the pupils wear them
- There is adequate supervision at all times when travelling
- Supervisors are reserved seats that allow them to supervise properly
- Pupils are supervised when boarding and leaving
- Extra care is taken when leaving a vehicle in a country that drives on the right as some doors may open onto the road side
- Standards of behaviour are met, and in particular that drivers are not distracted
- Smoking/alcohol etc bans are observed
- Pupils are occupied on long journeys – this will help the journey pass quickly
- Evacuation procedures are clearly understood by everyone, luggage is securely stored and emergency exits are kept clear
- There are adequate rest stops for drivers
- Head counts are carried out when the group is getting off or onto transport

## 2 Ongoing risk assessment

*HASPEV* chapter 2 paragraphs 37-46, and *Standards for LAs in Overseeing Educational Visits* deal with risk assessment. Risk assessment does not end when the visit begins. Changes to the itinerary, changes to the weather, incidents (whether minor or major), staff illness – all or any of these may bring pupils face to face with unexpected hazards or difficulties and give rise to the need to re-assess risk.

The group leader (and other adults with responsibility) prepares ongoing risk assessments while the visit is taking place. These normally consist of judgements and decisions made as the need arises. They are not usually recorded until after the visit. They should be informed by the generic and visit or site specific risk assessments.

It is good practice to have briefings each night to take stock and assess the circumstances for the next day, and to spend time early the next morning explaining arrangements to the pupils.

### 2.1 Check the local weather forecast

- To inform decisions on appropriate clothing.
- To be aware of whether water activities might be in areas prone to flash floods, high winds etc.
- To be aware of whether trekking or climbing at altitude might be subject to dramatic changes of weather; potential for fallen trees, avalanches etc.

### 2.2 Local knowledge

Seek local knowledge of potential hazards, for example

- Tides
- Rivers/streams prone to sudden increases in flow
- Difficult terrain
- Crossing points for road, rail or water
- Unstable cliffs

### 2.3 Plan B

- Good forward planning will always include alternative plans in case the itinerary needs to be changed
- A flexible itinerary can allow activities from later in the visit to be substituted for earlier activities if those are prevented by unexpected circumstances
- Group leaders faced with potential difficulties will feel more confident to change the itinerary if a pre-assessed alternative is available
- Regardless of whether alternatives have been pre-assessed, always take time to
- On arrival at an alternative site or activity that has not previously been risk assessed, we recommend that the group leader should risk assess the situation before allowing the pupils to disembark from the transport

- An unknown location might involve hazards not covered in the original risk assessment, for example if the original intention to visit a land-only site has to be changed at short notice to a lake or seaside location

## **2.4 Behaviour problems, illness or injury**

- Poor behaviour may be reduced by ensuring that all pupils are signed up to agreed standards of behaviour before (or at least at the beginning of) the visit.
- Educational visits can be a good opportunity for school staff to get to know pupils away from the confines of the school. But the group leader should resist any temptation to accept lower standards of behaviour. The different hazards that pupils may be exposed to away from the school will require them to observe standards of behaviour that are at least as high as, or higher than, in the classroom.
- If one adult has to give prolonged attention to one group member, the group leader should reassess the supervisory roles of the other adults to ensure that all members of the group know who is responsible for them. Activities may need to be amended until the other adult returns all of his or her attention to the group.
- Group leaders should trust their own knowledge of the young people and use their own professional judgement.
- This may include challenging an activity leader where the group leader's knowledge of the group is superior, or intervening to prompt a change of plan.

## **3 Emergency procedures**

### **3.1 Preparation**

See *HASPEV* Chapter 10 and *Standards for LEAs in Overseeing Educational Visits*. By their nature, emergencies are usually unexpected. But careful emergency planning can mitigate the trauma of being caught up in an emergency. It is good practice for the group leader to

- Agree an emergency action plan, which includes 24-hour (i.e. constant cover) contact points at the school/LEA and clear roles for the group leader, school/LEA contact, Head Teacher e.g. managing media interest, supporting parents of an injured pupil, transport arrangements etc
- Ensure that all members of the group know what action to take if there is a problem
- Hold evening briefings with supervisors to discuss issues for the next day
- Spend time early the next morning explaining arrangements to the pupils
- Hold, or ensure that other adults in the group hold, up to date competence in first aid and other life saving competence as necessary for the activities
- Ensure that the first aid kit is properly stocked and accessible
- ensure that all pupils' medical needs (e.g. asthma, diabetes, anaphylaxis) are known and that staff are competent to handle them be aware that some diseases are more common in some countries and know what preventative action to take and what to do if a group member becomes infected
- Recognise that many of the health problems of pupils on longer visits are caused by lack of food, of liquid or of sleep
- If appropriate, advise group members about the dangers of over-exertion in the heat and of dehydration, which can cause headache, dizziness and nausea
- In warm climates, keep fluid levels high, take extra salt and wear loose, lightweight clothing – preferably made of cotton or other natural fibres – and use suitably factored sun protection creams and sun hats/glasses
- Ensure that drivers take adequate rest breaks on long journeys
- Ensure that all pupils understand and follow the code of conduct
- Practice emergency drills e.g. evacuation of mini-bus
- If abroad, know where the nearest British Embassy or Consulate is located and the telephone number. Depending on the age of the pupils, it may be appropriate to ensure that they have this information to hand

### 3.2 Emergency procedures framework during the visit

If an emergency occurs on a school visit the group leader should maintain or resume control of the group overall. The main factors to consider include

- Establish the nature and extent of the emergency as quickly as possible
- Ensure that all the group are safe and looked after
- Establish the names of any casualties and get immediate medical attention
- ensure that a teacher accompanies casualties to hospital with any relevant medical information, and that the rest of the group are adequately supervised at all times and kept together
- Notify the police if necessary
- Ensure that all group members who need to know are aware of the incident
- Ensure that all group members are following the emergency procedures and the roles allocated to them – revise procedures and re-allocate roles as necessary
- Inform the school contact and provider/tour operator (as appropriate). The school contact number should be accessible at all times during the visit
- Details of the incident to pass on to the school should include: nature, date and time of incident; location of incident; names of casualties and details of their injuries; names of others involved so that parents can be reassured; action taken so far; action yet to be taken (and by whom)
- School contact should notify parents, providing as full a factual account of the incident as possible
- Notify insurers, especially if medical assistance is required (this may be done by the school contact)
- Notify the British Embassy/Consulate if an emergency occurs abroad
- Ascertain phone numbers for future calls. Try not to rely solely on mobile phones
- Write down accurately and as soon as possible all relevant facts and witness details and preserve any vital evidence
- Keep a written account of all events, times and contacts after the incident
- Complete an accident report form as soon as possible. Contact HSE or local authority inspector, if appropriate
- No-one in the group should speak to the media. Names of those involved in the incident should not be given to the media as this could cause distress to their families.
- No-one in the group should discuss legal liability with other parties, nor sign anything relating to accident liability without clear advice from their LA
- Keep receipts for any expenses incurred – insurers will require these

## 4 Advice on specific activities

### 4.1 Coastal visits

HASPEV chapter 8 'Types of Visit' has advice on coastal visits at paragraphs 181-2. HASPEV states: '...many of the incidents affecting pupils have occurred by or in the sea. There are dangers on the coast quite apart from those incurred in swimming.'

The group leader will want to bear the following points in mind when assessing the risks of a coastal activity

- Tides, rip tides and sandbanks are potential hazards; timings and exit routes should be checked
- Group members should be aware of warning signs and flags
- Establish a base on the beach to which members of the group may return if separated
- Look out for hazards such as glass, barbed wire and sewage outflows etc
- Some of a group's time on a beach may be recreational. Group leaders should consider which areas of the terrain are out of bounds, and whether the risk assessment allows swimming in the sea

- Cliff tops can be highly dangerous for school groups even during daylight. The group should keep to a safe distance from the cliff edge at all times – a 'buffer zone' between the pupils and the hazard. Be aware that cliff falls can mean that cliff paths stop abruptly at the cliff edge
- Group leaders should not normally allow pupils to ride mountain bikes on any route that is near a sheer drop e.g. coastal path or canal towpath. If the risk assessment indicates that the risk could be managed adequately, then there should be a small known group of skilled and experienced riders accompanied by appropriately qualified staff
- The local coastguard, harbour master, lifeguard or tourist information office can provide information and advice on the nature and location of hazards

#### **4.2 Swimming in the sea or other natural waters**

Swimming and paddling or otherwise entering the waters of river, canal, sea or lake should never be allowed as an impromptu activity. The pleas of children to be allowed to bathe – because it is hot weather, for example, or after a kayaking exercise – should be resisted where the bathing has not been prepared for. In-water activities should take place only when a proper risk assessment has been completed and proper measures put in to control the risks. The activities should be formal and supervised.

It is good practice that, wherever possible, group leaders seek out recognised bathing areas that have official surveillance ie qualified lifeguard cover. But, even then, group leaders should be aware that pupils might mingle with members of the public and be lost to view. Pupils should always be in sight and reasonable reach of their supervisors.

The group leader should

- Be aware that many children who drown are strong swimmers
- Ascertain for themselves the level of the pupils' swimming ability
- check the weather
- Be aware of the local conditions – such as currents, weeds, rip tides, a shelving, uneven or unstable bottom – using local information from the lifeguard, coastguard, harbourmaster, police or tourist information office
- Beware of rocks, breakwaters and other potential hazards
- Look out for warning signs and flags: a red flag means it is unsafe to swim; yellow flags mean that lifeguards are on patrol in the area between the flags; a black and white flag means it is an area used by surfers and not suitable for swimming
- Designate a safe area of water for use by the group
- Brief the group about the limits of the swimming area
- Avoid crowded beaches where it is harder to see pupils
- Be aware of the dangerous effects of sudden immersion in cold water
- Be aware of the dangers of paddling especially for young pupils
- Ensure that pupils have not eaten (at least half an hour) before swimming
- Ensure the activity is suitable for the pupils, especially any with special needs or disabilities
- Adopt and explain the signals of distress and recall
- Ensure that buoyancy aids, lifejackets etc are used where appropriate
- Carry out regular head counts
- Be aware that it is not always possible to tell when someone is in difficulties

Supervisors should

- Have clear roles – at least one supervisor should always stay out of the water for better surveillance, even where lifeguards are on duty
- Take up a best position from which to exercise a constant vigilance
- Divide their careful watching between staff who stand in the sea and look landward towards the group and staff who stay on land and watch the group from that vantage point
- Give the children their full, undivided attention

- Always follow the advice or directions of a lifeguard
- Never swim themselves unless it is to help a child in distress
- Not join in any of the children's games
- Ensure that no child is allowed to wade out or swim further than his or her waist height
- Nevertheless, be aware that it is possible to drown in one's own depth, and to act immediately when a child appears to be in difficulties
- Ensure that children leave the water immediately if they get too cold, especially if toes and fingers look blue or feel numb – could suggest the onset of hypothermia
- Recognise that a child in difficulty is unlikely to wave or shout – all of their energies will be in trying to keep afloat

It is good practice for the group leader, or another designated adult in the group, to hold a relevant life saving award, especially where lifeguard cover may not be available. For further advice contact the: The Royal Lifesaving Society UK, River House, High St, Broom, Warwickshire B50 4HN (Tel: 01789 773994) <http://www.lifesavers.org.uk/>.

#### **4.3 Farm visits**

'There is a seasonal increase in the number of cases of E.coli 0157 infection, and there is a link between farm visits and infection in young children. This means that some simple and sensible precautions should be taken.' – Chief Medical Officer -12 April 2000.

Group leaders should check the provision at the farm to ensure that

- Eating areas are separate from those where there is any contact with animals
- There are adequate clean and well maintained washing facilities
- There is clear information for visitors on the risks and the precautions to take

Ensure that

- There is adequate trained adult supervision wherever children can come into contact with animals and need to wash their hands
- All children wash their hands thoroughly immediately after touching animals and before any eating or drinking
- Shoes are cleaned and then hands are washed on leaving the farm

Never let pupils

- Place their faces against the animals
- Put their hands in their own mouths after touching or feeding the animals
- Eat or drink while going round the farm
- Eat or drink until they have washed their hands
- Sample any animal foodstuffs
- Drink from farm taps (other than in designated public facilities)
- Touch animal droppings – if they do then wash and dry hands
- Ride on tractors or other machines
- Play in the farm area, or in other areas that are out of bounds such as grain storage tanks, slurry pits etc

The Chief Medical Officer's revised guidance suggests

- Individual supervision by an adult for every child younger than 12 months
- A supervision ratio of one adult for two children for children between ages one and two
- Gradually increasing ratios up to one adult for eight children for children between ages five and eight
- Higher standards for washing facilities

## **5 Further information**

### **5.1 Department for Education**

*Work experience: A guide for secondary schools 2002*

*Work Experience: A guide for employers 2002*

*Child Protection: Preventing Unsuitable People from Working with Children and Young Persons in the Education Service.* DFE May 2002.

Chief Medical Officer Advice on Farm Visits: A Department of Health Press Notice 12 April 2000.

### **5.2 HSE**

*Guidance to the Licensing Authority on the Adventure Activities Licensing Regulations 1996* (HSC £9)

*A Guide to Risk Assessment Requirements* – <http://www.hse.gov.uk/pubns/indg218.pdf>

*Avoiding ill health at open farms: Advice to teachers AIS23* new edition 28 June 2000 of advice mentioned in HASPEV).

*Five Steps to Risk Assessment.* (<http://www.hse.gov.uk/pubns/indg163.pdf>)

*Adventure activities centres; five steps to risk assessment* (£4.50)

The New General Teaching Requirement for Health and Safety, QCA/HSE, 1999

*Managing Health and Safety in Swimming Pools* revised edition 1999. HSG 179 £10.50

*Reducing Risk Protecting People 2001*

*Preparing Young People for a Safer Life* (issued with Cheshire County Council and The Institute of Occupational Safety and Health – tel 0116 257 3100). This has a model risk assessment for a sponsored walk.

*Adventure activities centres: five steps to risk assessment* (£4.50)

Adventure Activities Industry Advisory Committee (AAIAC): *Statement of Risk Perception in Adventure and Outdoor Activities*

### **5.3 Others**

Information about adventure activity providers covered by the Adventure Activities Licensing Scheme <http://www.aala.org.uk>

The Wales Tourist Board, the Scottish Tourist Board and the British Activity Holiday Association (see next) provide voluntary inspection schemes to complement licensing for providers of activities that are out of scope of licensing

The British Activity Holiday Association, 22 Green Lane, Hersham, Surrey, KT12 5HD. Tel/Fax: 01932 252994. [www.baha.org.uk](http://www.baha.org.uk)

*Get Safe for Summer* – Amateur Swimming Association. [www.asa.-awards.co.uk](http://www.asa.-awards.co.uk)

*Safe Supervision for Teaching and Coaching Swimming.* Amateur Swimming Association and others. 2nd edition 2001 Tel: 01509 618700. Advice on ratios in HASPEV paragraph 187, which are pupil year-based, should be read in conjunction with the competence-based ratios in *Safe Supervision*

The Royal Lifesaving Society UK, River House, High St, Broom, Warwickshire B50 4HN (Tel: 01789 773994) <http://www.lifesavers.org.uk/>

*Minibus Safety: A Code of Practice* – RoSPA and others 2002 [www.rospace.com/pdfs/road/minibus.pdf](http://www.rospace.com/pdfs/road/minibus.pdf)

*Safety on School Trips A Teachers and the Law Booklet* – The Professional Association of Teachers.  
Revised edition 2002

*Educational Visits* – NASUWT 2001

Guidance published by the National Governing Bodies (NGBs) for various adventure activities as in *HASPEV*. NGBs also maintain leader training and assessment programmes.

*Safe and Responsible Expeditions and Guidelines for Youth Expeditions* – Young Explorers' Trust, c/o RGS-IBG Expedition Advisory Centre. £5 inc. p & p or free from website: <http://www.rgs.org/eacpubs>

The Royal Geographical Society (with IBG)'s Expedition Advisory Centre, 1 Kensington Gore, London SW7 2AR provides advice, information and training to anyone planning an overseas expedition. Tel 020 7591 3030 <http://www.rgs.org/eac>

The Independent Schools' Adventure Activities Association (ISAAA) offers help, support and technical advice to any Independent School [www.malcol.org/isaaa/](http://www.malcol.org/isaaa/)

The Duke of Edinburgh's Award has its own clear structure, procedures and guidelines <http://www.theaward.org/>.

Guidance is produced by many of the voluntary youth organisations

*Guidelines for Off-Site Educational Visits and Activities in the United Kingdom* Nottinghamshire CC September 2001 has a section on camping pages 75-79.

*Safe Kids Campaign* Report 2000, Child Accident Prevention Trust

Transport for London provides free transport for school groups on the underground, buses, Thameslink and the Docklands Light Railway. The advice line for the scheme is 0207 918 3954 and the website is at [www.tfl.gov.uk/schoolparty](http://www.tfl.gov.uk/schoolparty). The general travel advice line can offer information on route planning and station layouts. Apart from its commitment to the safety of its passengers Transport for London does not offer specific advice on health and safety for school groups, but refers them to *HASPEV* and HSE risk assessment guidance.

*The Waterways Code* (leaflet) and *The Waterways Code for Boaters* (video) are available from British Waterways – [hq@britishwaterways.co.uk](mailto:hq@britishwaterways.co.uk) – tel: 01923 201120

The Suzy Lamplugh Trust has produced a range of guidance on personal safety, including booklets, videos and training courses <http://www.suzylamplugh.org>

The OCR (Oxford Cambridge RSA) 'Off-Site Safety Management Scheme' provides a training course aimed at those who organise off-site visits. It is exam-based and teachers can combine it with practical experience:

<http://www.ocr.org.uk/schemes/ownbrand/examined/offsite/Offindex.htm>

## **DfE NEW CONSENT FORM FOR SCHOOL TRIPS AND OTHER OFF-SITE ACTIVITIES**

Please sign and date the form below if you are happy for your child, <name of the child>:

- a) To take part in school trips and other activities that take place off school premises; and
- b) To be given first aid or urgent medical treatment during any school trip or activity.

**Please note the following important information before signing this form:**

- The trips and activities covered by this consent include;
  - all visits (including residential trips) which take place during the holidays or a weekend
  - adventure activities at any time
  - off-site sporting fixtures outside the school day,
  - all off-site activities for nursery schools.
- The school will send you information about each trip or activity before it takes place.
- You can, if you wish, tell the school that you do not want your child to take part in any particular school trip or activity.

Written parental consent will not be requested from you for the majority of off-site activities offered by the school – for example, year-group visits to local amenities – as such activities are part of the school’s curriculum and usually take place during the normal school day.

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

**MEDICAL INFORMATION**

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

**Signed**.....

**Date**.....