

Educational Visits *Lincolnshire* Employer Policy and Guidance

September 2015



Use the most recent version at

<http://lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service>

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SECTION 1 CONTACTING US



The preferred method of enquiry is via email. If you need to make a telephone enquiry please telephone 01522 553209.

	http://lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service	This site has been expanded to include additional resources. Access the most up to date version of this policy and guidance document via the website.
	mailto:evsupport@cfbt.com	The preferred method for sending an enquiry. The preferred method for sending approval and notification forms is via email. Please see Section 6.3 for more details. In relation to Category B and C Visits we require at least 2 months notice for visits in the UK and 3 months notice for visits abroad. Please reference guidance in Section 6.3 in relation to Category A and B Visits.
	Fax: 01522 516033	Approval and notification forms can be sent via fax FAO: Educational Visits. Faxes are automatically turned into emails and sent to the EV Support email address. This is a secure and fast method for sending forms. See Section 6.3 for more details. Please see above re required notice periods.
	Myle Cross Centre, Macaulay Drive, Lincoln, Lincolnshire. LN2 4EL.	Forms can still be sent via the post/courier FAO Educational Visits. Please note that the courier has now changed to a fortnightly pick up and drop off. This will result in a slower response. Please see above re required notice periods.

SECTION 2 INTRODUCTION

Lincolnshire County Council (LCC) supports Educational Visits and provides this employer policy and guidance to enable schools/settings to focus on the careful planning and organisation so that the potential risks in taking young people off site are reduced to a tolerable level.



In the event of an incident the employer and employees will be judged against their employer's policy and guidance.



The Lincolnshire Employer Policy and Guidance document will be reviewed annually unless there are significant changes to guidance and/or law which require immediate changes. The **normal** release date will be **September** of each year. CfBT Education Services took responsibility for the Education Visits Service in June 2011.

National Government advice was updated on 13 February 2014 (latest version will be accessible here):

<http://www.education.gov.uk/aboutdfe/advice/f00191759/departamental-advice-on-health-and-safety-for-schools> This document has considered this advice.

Previous advice was presented via: 'Health and Safety of Young people on Educational Visits' – HASPEV (1998) and associated supplements: 'Standards for LEAs,' 'Standards for Adventure' and 'Handbook for Group Leaders' and 'Health and Safety: Responsibilities and Powers' (2002). The HASPEV publication and supplements are referred to in this document as they are still considered to represent good practice.

Feedback from schools and settings indicates the continued need for comprehensive policy and guidance that can be easily accessed and understood. Detail has been retained in this review in order to provide consistent policy and guidance.

It is recommended therefore that all educational establishments use this guidance to determine their policy and practice when engaging in visits with young people.

The Educational Visits Service is operated by CfBT Education Trust in partnership with Lincolnshire County Council.

This policy and guidance document supersedes that of the LEA green booklet 1/97, the revised 9/01 version, “Educational Visits and Hazardous Activities” (Advice and Guidance) and the Lincolnshire County Council Safety in Outdoor Education Policy and Guidance Document.

This current policy guidance draws heavily on the following advice and good practice from:

- The Outdoor Education Adviser’s Panel (OEAP)
- Latest Department for Education advice
- Previous government advice via the ‘Health and Safety of Young people on Educational Visits’ – HASPEV document (1998) and associated supplements: ‘Standards for LEAs,’ ‘Standards for Adventure’ and ‘Handbook for Group Leaders’ and ‘Health and Safety: Responsibilities and Powers’ (2002)

Key principles:

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

SECTION 3 KEY REVISIONS/ADDITIONS

This document has considered the latest ADVICE from the Department for Education and guidance from the Outdoor Education Adviser's Panel (OEAP).

Sections of the document have been reworded to provide clarity on the responsibility of Trustees/Governing Bodies of Academies, Foundation and Voluntary Aided schools in relation to the approval of educational visits.

7.1.4 Early Years Foundation Stage – changes have been made to reflect the Statutory Framework for the Early Years Foundation Stage, September 2014.

7.3 Child Protection

Schools/settings must also adhere to the latest statutory guidance from the Department for Education. A new document was published in March 2015.

Keeping Children Safe in Education: for schools and colleges

Keeping Children Safe in Education: for school and college staff (part 1)

<https://www.gov.uk/government/publications/keeping-children-safe-in-education--2>

8.9.3 Exchange Visits



Schools/settings must also adhere to the latest statutory guidance from the Department for Education. A new document was published March 2015.

Keeping Children Safe in Education: for schools and colleges

Keeping Children Safe in Education: for school and college staff (part 1)

<https://www.gov.uk/government/publications/keeping-children-safe-in-education--2>

SECTION 4 KEY DEFINITIONS

 <p>Community, Community Special, Voluntary Controlled, Maintained Nursery schools/settings and pupil referral units</p>	<p>Lincolnshire County Council (LCC) is the employer in Community, Community Special, Voluntary Controlled, Maintained Nursery Schools and Lincolnshire Teaching and Learning Centres. <i>These settings are required to follow this Employer Policy and Guidance.</i> Each setting should create an Educational Visits policy which provides additional/local information to meet their unique needs. A good example is to provide a detailed breakdown of roles and responsibilities. These settings receive email and telephone support and can access training via their SLA.</p>
 <p>Academies, foundation, foundation special, and voluntary aided schools</p>	<p>The Trustees or the Governing Body are usually the employer in Academy, Foundation, Foundation Special and Voluntary Aided schools/settings. It is recommended that these settings use this policy and guidance to determine their policy and practice when engaging in off-site work with their young persons. Settings can buy into the service via a Service Level Agreement or a contract for services. Contact evsupport@cfbt.com for further information. Please note CfBT will be able provide feedback on the recommendations given by the Trustees/Governing Body, however, the Trustees/Governing Body remain responsible for the approval of educational visits.</p>
<p>Employer Policy and Guidance</p>	<p>Applies to most situations where adults, acting in the course of their employment, have responsibility for children and young people who are taking part in learning and recreational activities in an environment that is different from where the young people are usually based. It therefore applies when organising and supervising children and young people participating in visits. This guidance will also be relevant to managing groups of vulnerable adults.</p>
<p>Activity</p>	<p>“Any specific element within a visit. This might be a particular activity (such as pond dipping) but could equally refer to a specific element of the visit (such as travel or residence). Visits should be regarded as comprising a number of consecutive and interdependent activities”. <i>(National Guidance, OEAP, Basic Essential Folder, http://oeapng.info)</i></p>

<p>Educational Visit/Visit</p>	<p>Any occasion when a young person takes part in a structured and employee-led learning activity which is carried out beyond the boundary of the normal operational base, but excepting the following:</p> <ul style="list-style-type: none"> • Where establishments operate on a split site • Work experience as defined in the publication "Work Experience: a guide for secondary schools" (DfES 2002) • Physical Education: only the journey to and from the venue. The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the employer and Association for Physical Education (AfPE). <p>These terms describe the entire period between departing from and returning to the establishment or home setting, including time devoted to travel. The visit will usually comprise a number of interdependent activities.</p> <p><i>Duke of Edinburgh provision is supported by a different department in Lincolnshire County Council.</i></p>
<p>Educational Visits Coordinator (EVC)</p>	<p>It is considered good practice to have an Educational Visit Coordinator in every establishment, who is trained in accordance with their employer’s requirements, experienced in the management of groups involved in outdoor learning and Learning Outside of the Classroom (LOtC), and is a member of staff “with the status to effect change and be the focus of good practice” (<i>National Guidance, OEAP, Basic Essentials Folder, http://oeapng.info</i>). All community, community special, voluntary controlled, maintained nursery schools/settings and Lincolnshire Teaching and Learning Centres are required to have an EVC registered with LCC.</p>
<p>High Risk Activity</p>	<p>“Any activity with a risk of serious or long term harm to participants, which requires the activity leader to have specialist competence to manage it. Often associated with Hazardous Environments.” (<i>National Guidance, OEAP, Basic Essentials Folder, http://oeapng.info</i>)</p>
<p>Hazardous Environment</p>	<p>“Any environment that in itself presents a significant physical risk. Principal examples involve water or potential to fall from a height.” (<i>National Guidance, OEAP, Basic Essentials Folder, http://oeapng.info</i>)</p>

Learning Outside the Classroom (LOtC)	Learning Outside the Classroom is the term used to describe the involvement of young people in a range of learning activities “ <i>outside their immediate and accustomed environment when they learn from first-hand experiences</i> ”.
Low Risk Activity	An activity where safety management requires competent but non-specialist supervision.
Off-Site	“The term describing any activity taking place outside the physical boundaries of the organising establishment or setting.” (<i>National Guidance, OEAP, Basic Essentials Folder, http://oeapng.info</i>)
Participants	All members of the party who are not in the staff team. As well as the young people from the establishment this may also include adults (on a family outing, for example) or children of adults on the staff team.
Provider	Any third party who is contracted to organise and/or deliver an activity and who is not an establishment employee.
Staff Team	All the adults on a visit who share the responsibility for supervision. All should be well briefed by the visit leader to be clear about their roles and the task allocated to them.
Visit Leader	“The designated person responsible for the visit and who will have overall responsibility for the safety and conduct of participants and the visit leadership team.” (<i>National Guidance, OEAP, Basic Essentials Folder, http://oeapng.info</i>)

SECTION 5 INTRODUCTION

5.1 THE VALUE OF EDUCATIONAL VISITS

Educational visits have been recognised for many years as having beneficial effects on the education of young people. These contribute to:

- The promoting of a positive response towards personal health, safety and well being
- The gaining of a greater understanding and appreciation of the wider world
- An awareness of the need for sustainable relationships between people and the environment
- The fostering of the growth of self-esteem, co-operation with others and personal responsibility
- The provision of exciting opportunities for practical problem solving, personal challenge and team working skills

In supporting schools/settings in their recognition of the value of Education Visits and its inclusion in the work and life of the school/setting, Lincolnshire County Council (LCC) encourages schools/settings to include a statement in the Educational Visits Policy that reflects its view of the aims and purposes of Educational Visits. In this way, the aims of each visit can be shown to have direct relevance to the school/setting's curriculum and broader aims. **Model school/setting policies are available via the website. All Lincolnshire Community and VC Schools must use/adapt the model provided or have an appropriate alternative.**

5.2 EQUAL OPPORTUNITIES

Educational visits should be available and accessible to all who wish to participate, irrespective of gender, religion, ethnic origin, social background, medical need or physical ability. All young people should be encouraged to participate in as wide a variety of activities as possible.

Schools/settings are advised to give particular attention to the [Equality Act 2010](#). This will help schools/settings to ensure that young people with disabilities are not treated any less favourably and that all reasonable steps have been taken to include them in such activities.

5.3 THE LEGAL FRAMEWORK.

Health and Safety

The Health and Safety responsibilities for all school/setting activities derive from the Health and Safety at Work Act 1974 and the Management of Health and Safety at Work Regulations 1999.

Health and Safety legislation is enforced by the Health and Safety Executive, (HSE)

The 1974 Act places the main responsibility for health and safety with the employer. This varies according to the type of school.

REMEMBER: Lincolnshire County Council is the employer in Community, Community Special, Voluntary Controlled, Maintained Nursery Schools and Pupil Referral units/Learning Centres.

The Trustees or Governing Body are usually the employer in Academy, Foundation, Foundation Special, and Voluntary Aided Schools.

The Proprietor or the Governing Body is usually the employer in Independent Schools.

The LA is the employer for statutory youth groups.

Education employers have duties to ensure, as far as reasonably practicable:

- The health, safety and welfare of teachers and other education staff
- The health and safety of young people in school and off-site visits
- The health and safety of visitors to schools/settings and volunteers involved in any school/setting activity

Employees also have responsibilities through the 1974 Act and the 1999 Management of Health and Safety at Work Regulations:

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

Employers must assess the risks of all activities, introduce measures to manage those risks and tell employees about those measures.

Specific health and safety tasks may be delegated to individuals or schools/settings.

The assessment of the risks of all visits within the scope of this document is an example of such delegation.

Enforcement

In the event of enforcement being necessary, the Health and Safety Executive (HSE) would normally take action against the employer. In some circumstances however, where an employee failed to take notice of the employer's policy and guidance or instructions, the HSE may take action against the employee.

Common Law

All who have responsibility for others in an educational context have a duty of care in common law. This was known as '*in loco parentis*' but with the Woolf Reforms is now referred to as the '*Standard of Care*' and is continuous during any visit, **it cannot be delegated**. This principle applies to all young people under the age of 18 and therefore LCC believes parental/carer consent is required when persons under 18 are away from the school/setting site as part of the school's planned and organised activities.

Additionally, a higher duty of care is expected to be exercised by teachers and school/setting staff because of their training, specialised knowledge and skills in working with groups of children.

The courts apply reasonableness rather than perfection and that the level of supervision is sufficient to prevent foreseeable accidents. The courts also recognise that certain educational environments have an inherent hazard factor beyond that of the normal classroom and the higher duty of care is particularly required in these situations.

Common Law indicates that the age of the young person, the nature and location of the activity are factors in determining the degree of supervision required. Known patterns of behaviour of particular young people should also be considered.

5.4 BASIC PRINCIPLES OF SAFE PRACTICE

Off-site activities by their very nature and location carry elements of risk above those normally found in the classroom. By adopting the principles listed below, accidents or incidents will not be eliminated entirely, but schools/settings will ensure that their likelihood is reduced to a tolerable level.

1. Ensure there is a clearly identified purpose to the whole programme and parts of the programme appropriate to the age and ability of the group
2. Keep parents/carers, young people and relevant authorities informed about proposed activities and gain approval where necessary
3. Carry out risk assessments that take account of the health, safety and welfare of all participants and record the significant findings. (Don't forget that adults are not immune from accidents)
4. Seek advice when there is doubt about safe practice
5. Carry out a pre-visit to the area or if this is not reasonably practicable gather sufficient background information before the visit
6. Ensure compliance with any statutory requirements
7. Work within the standards of competence and guidance recommended by the employer policy and guidance, national governing bodies and other recognised organisations
8. Ensure that the qualities of leadership, judgement, anticipation and control are present on the part of all who accompany the visit, especially the visit leader
9. Ensure that appropriate clothing and equipment is available
10. Have clearly established codes of behaviour, agreed and understood by all
11. Ensure adequate supervision at all times that relates to the level of risk being encountered

12. Know your group
13. Have a responsible attitude to the environment; it shows a responsible attitude to self and other.
14. Ensure all adults carry a full list of group members, (including adults,) with the appropriate contact numbers, medical details and appropriate consent forms
15. Maintain professional and personal experience related to specific activities and environments
16. Where LCC is the employer, all incidents, accidents, or near misses must be recorded and a duplicate copy sent to the Educational Visits Service (N.B. The Educational Visits Service must receive a copy of the [Evaluation Form LEV 4](#) for **all** visits where a SIGNIFICANT ISSUE has occurred). Where LCC is not the employer, it is recommended for schools/settings to communicate these to the Educational Visits Service.
17. **Maintain a school/setting visit log giving details of places visited, staff involved and their roles, young people taken and activities experienced. All supporting documentation, especially the risk assessments relating to the visit, should be retained to enable the monitoring of procedure and practice to take place.**

SECTION 6 MANAGEMENT AND PLANNING

6.1 ROLES AND RESPONSIBILITIES

6.1.1 Lincolnshire County Council (where LCC is the employer)

Lincolnshire County Council will:

- Make this document available to all Children's Services establishments and other relevant settings
- Assess proposals for specified types of visits
- Provide access to staff for advice
- Establish points of contact for staff in the case of emergency
- Ensure training needs have been addressed
- Maintain specified insurance cover for schools/settings
- Maintain procedures for the monitoring and review of safety procedures during visits



Schools/settings where LCC is not the employer will need to ensure that the trustees/Governing Body has considered those responsibilities listed above. CfBT Education Services is able to offer support, advice, (including recommendations for visit approval), access to documents and high quality training via a Service Level Agreement/Contract for Services. **CfBT can offer advice on the approval given for the visit by the trustees/Governing Body but the trustees/Governing Body remain responsible for the approval of the educational visit.**

6.1.2 Governing Body

The Governing Body should:

Endorse this LCC policy and guidance document via an adapted school policy, which will include additional information and reference to:

- How off-site activities are approved
- How training and information is provided
- Emergency action procedures
- The reporting of accidents and incidents including 'near misses'
- Monitoring and reviewing policy and practice
- The assessing of proposals for certain types of visit, which should include overnight stays and visits outside the UK
- Ensuring that less routine and hazardous activities are planned well in advance and that proposals are submitted to LCC where appropriate
- The management of any significant provision particular to the school/setting, e.g. Minibus.

A model policy is available via <http://lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service>

Where LCC is not the employer, a suitable model policy is available, upon buying into the service, to support the Governing Body/Trustees in identifying roles and responsibilities.

6.1.3 Headteacher/Setting Leader

The Headteacher/Setting Leader must ensure that:

- All off-site activities comply with the employer policy and guidance and local school/setting procedures
- The visit leader and additional staff are suitably experienced and competent to manage all aspects of the visit
- Approval procedures are followed
- The planning checklist has been followed
- Risks have been assessed, recorded and safety measures are in place to manage those risks
- Child Protection procedures are understood and utilised
- Visits are inclusive and take account of young people with special needs and disabilities

Additionally, Headteachers/setting leaders should introduce procedures that enable the Governing Body to ask questions about the organisation of visits generally as well as those for which governor approval is required.

Through the agreement of governors, sufficient time and resources should be identified so that EVCs can fulfil their role efficiently and the induction and training of staff and volunteers can be carried out.

6.1.4 The Educational Visits Co-ordinator (EVC)

It is good practice for schools/settings to have an Educational Visits Co-ordinator (EVC). This may be the Headteacher or it could equally be a teacher or other member of school staff. In this case the EVC will be appointed by, and act on behalf of, the Headteacher/setting leader.



All schools/settings where LCC is the employer **MUST** have an appointed and registered EVC.

The formal recognition of the EVC function will help the school carry out its health and safety obligations for off-site visits.

The EVC will be involved in the planning and management of all school/setting visits though not necessarily in the actual visit itself. **Even though the tasks associated with the role of EVC have been delegated to that person, ultimate responsibility for health and safety remains with the employer.**



Community and Controlled schools should complete form LEV 5 ([Section 9](#)) to enable the EVC to be registered with Lincolnshire County Council/CfBT Education Trust and thus able to authorise at school/setting level all category 'A' and 'B' visits. Category 'C' visits will be supported by the EVC but approved at LCC/CfBT level.



Academy, Foundation, Aided and Independent schools may make use of the Educational Visits Service if they wish to buy into it, however, approval for **all** visits in such schools/settings will remain with the trustees/governing body in those settings. Recommendations will be provided by the Educational Visits Services based on the information provided.

These settings are not obliged to complete the LEV 5 registration form, however registration will help the processes of communication between the Educational Visits Service and EVC in these schools/settings.

The member of school/setting staff designated as the EVC should be specifically competent. The level of competence required will relate to the types of visits undertaken by the school/setting.

Functions of the EVC

- Ensure visits meet the employer's and school/setting's requirements
- Support the head and governors with approval and other decisions
- Assess the competence of prospective leaders and staff
- Ensure risk assessments are suitable for the purpose
- Organise training and induction
- Ensure parents/carers are informed and give consent
- Co-ordinate emergency arrangements
- Keep records of visits, accident or incident reports
- Review systems and monitor practice
- Liaise with the Educational Visits Service

6.1.5 The Visit Leader

The Visit leader has overall responsibility for the supervision and conduct of the visit including direct responsibility for the health, safety and welfare of young people whilst on a visit.

The visit leader must

- Be approved to carry out the visit and obtain the permission of the Headteacher/Setting Leader before any visit takes place
- Be suitably **competent** (see below) and **knowledgeable** about employer policy and guidance
- Plan and prepare for the visit and assess the risks
- Plan emergency arrangements
- Define roles and responsibilities of other staff and young people and ensure effective supervision of what they do
- Liaise with the EVC and / or Educational Visits Service over any matters where advice is required
- Ensure appropriate parental consent for the visit has been obtained
- Evaluate the visit on return to school/setting and record / report any accident, incident or near miss
- Utilise the planning checklist to ensure all procedures have been followed

Competence

Evidence of competence may be through qualification and / or the experience of practical leadership over many years of off-site visits and activities. The ability to use common sense is an important third aspect of competence. “For further information about appropriate technical qualifications, to lead or advise on specific adventure activities, see the qualifications matrices produced by the Adventure Activities Licensing Authority (AALA) in AALA guidance note 5.18 at <http://webcommunities.hse.gov.uk/connect.ti/adventureactivitiesnetwork/view?objectId=544293>” (*National Guidance, Assessment of Competence*, <http://oeapng.info>)



Note however that if a teacher/adult were to lead a hazardous activity such as sailing or rock climbing without a recognised qualification, even though the teacher/adult were an experienced person in their own right, the law would be likely to view them as a talented amateur and therefore not qualified to lead that activity. Specialist instructors with recognised National Governing Body/specialist qualifications are required to lead hazardous activities.

[HOME](#)

6.1.6 Additional Members of Staff and Volunteers

Members of staff act as employees of the employer whilst on work related visits. Members of staff and volunteers including parent helpers should:

- Assist the visit leader in ensuring the health, safety and welfare of all young people on the visit
- Be clear about their roles and responsibilities whilst taking part in the visit or activity
- **Suitably confident and competent to carry out the duties**

For further information on the responsibilities of additional members of staff/volunteers refer to Legal Frameworks and Employer Systems, National Guidance, OEAP, <http://oeapng.info>

6.1.7 Young People

During visits, young people also have responsibilities that they should be made aware of, by the visit leader or other members of staff, for their own health and safety and that of the group.

Young people should:

- Not take unnecessary risks
- Follow the instructions of the visit leader, activity leader or other members of staff
- Behave sensibly keeping to the agreed code of conduct
- Inform a member of staff of any significant hazards

6.1.8 Parents/carers

Parents/carers have an important role in deciding whether any visit is suitable for their child, informed by the information presented to them in the initial proposal for the visit.

Subject their agreement to the visit, parents/carers should:

- Inform the visit leader about medical, psychological or physical conditions relevant to the visit
- Provide emergency contact numbers
- Sign the appropriate consent form ([See Section 7.7](#))
- Support the school/setting in its work to ensure the health, safety and welfare of all those who are taking part in the visit

6.2 RISK ASSESSMENT

Risk assessment is the key to the effective management of health, safety and welfare issues whilst away from the school/setting site. It is important that those who take young people on educational visits recognise that **risk assessment is a continuous process for the duration of a visit and not a 'one-off' form filling exercise**. The process will help to minimise and manage risk.

Risk Assessment is little more than a careful examination of the factors at work during visits, which could cause harm to people, so that you can decide whether you have done what is reasonably practicable to prevent harm.

A hazard is anything with the potential to cause harm or injury.

A risk is the likelihood and extent of harm being caused.

The key tasks are to **identify significant hazards** and **ensure risks are minimised** so that they are small. It may be necessary to draw up a list of tasks or actions to ensure minimal risk through the use of adequate control measures.

Risk Assessments for educational visits can be usefully considered as having three levels:

- Generic activity assessments which are likely to apply to that activity wherever and whenever it takes place
- Visit / site specific assessments which will differ from place to place and group to group
- On-going or dynamic assessments that take account of, for example, illness, changes in weather or change of planned activity (plan B required)

Each establishment should assess the risks involved in the range of activities undertaken and environments used on a regular basis (annually is suggested).

Associated hazards such as transport and security should not be overlooked. It is also important to consider what effect accident to, or illness of, staff may potentially have on the activity or visit. Risk Assessments should be recorded, reviewed and amended if necessary, and in particular for:

- Any new programme, activity or environment
- Specific activities, locations, circumstances or groups which may hold health, safety or welfare concerns
- Any large-scale event (e.g. Sponsored walk)
- All Category C visits (see the next section)

It is strongly recommended that schools without robust risk assessment systems of their own adopt or adapt the forms in [Section 9](#) of this document.

6.3 APPROVAL PROCEDURES AND DELEGATION



All visits from Community and Controlled schools/settings **must** follow the approval and delegation system outlined below. In schools/settings where LCC is **not** the employer it is recommended that a similar system is adopted and the Educational Visits Service used to make recommendations to support the approval process. This service is accessed via the Professional Development Agreement with CfBT Education Services.

This is a risk assessment based system whereby due recognition is given to the experience, skills and qualifications of school staff in organising, managing and leading off-site activities.



REMEMBER: All Community and Controlled schools should submit to the LA via CfBT Education Services, for registration, details of the experience, skills and qualifications of the EVC, deemed competent by the Headteacher/Setting Leader, within the school/setting's normal portfolio of off-site activities. (Form LEV 5 is to be used for this purpose).

ALL Community and Controlled Schools/Settings: if in agreement with the Headteacher/Setting Leader and Chair of Governors, the Education Visits Team supports a school/setting's request for its EVC to be registered, all Category A and B visits below may be approved at school level (residential B visits must still be notified to the Educational Visits Team). Any concerns should be discussed with the Education Visits Adviser. **EVCs should attend EVC training once every 3 years.**

Headteachers and Governing Bodies of Academies, Foundation and Aided schools should establish their agreed school/setting's policy and procedure for visit approval. The advice of the Educational Visits Service is available to such schools/settings and it is strongly recommended that this policy and guidance shapes practice in all schools/settings where young people are taken on visits and particularly in respect of Category 'C' visits. Academies, Foundation, Aided and Independent schools/settings may register with CfBT education Services should they so wish and will require a Professional Development Agreement with CfBT Education Trust. **EVCs should attend EVC training once every 3 years.**

In determining the appropriate category in which to place a particular visit or activity, the EVC and where necessary, the Educational Visits Team, should take account of the environment in which the activity will take place. An activity might be rated in a higher category if it takes place:

- In or near water;
- In winter conditions;
- On or near cliffs or steep terrain;
- In an area subject to extremes of weather or environmental change, e.g. rapid change in water level.

Field study activities for example, normally category 'A' would become 'B' if taking place next to open water.



Category 'C' will include any situation in which the young people are in, on or have easy access to open water as part of a planned programme of properly supervised and conducted activity.

This does not include the normal schools/settings swimming programme for which separate guidance exists.

6.3.1 Visit Categories and Approval Procedures



VISIT CATEGORIES AND APPROVAL PROCEDURES

Cat	Example of visit / activity	Approval Procedure for Community and Voluntary Controlled Schools/settings	Suggested Procedure for Academies, Foundation and Independent Schools
A	Visits and journeys with risks similar to that of everyday life, eg. historic sites, museums, local walk, theatre, fieldwork in the locality.	Headteacher/Setting Leader or EVC approval depending on school procedures. Visit leader approved by head. Governors - notification of visit only. LA advice if required.	Headteacher/Setting Leader or EVC approval depending on school procedures. Visit leader approved by head. Governors - notification of visit only. Educational Visit Service advice if required
B	Outdoor / Adventure Activities in more remote areas having an element of risk, e.g. Walks below 600m altitude. Activities in countryside environments. Any visit with a residential element within the UK, e.g. Activity Centre. Specialised activities require NGB Qualification for leaders/instructors.	Headteacher/Setting Leader – approval. EVC – approval. Governors – notification for day visit, approval if residential. LA notification if residential. LA advice if required. -  Forms to be forwarded to LA at least 2 months before intended date of visit (UK) or 3 months if abroad.	Headteacher/Setting Leader – approval. EVC – approval. Governors – notification for day visit, approval if residential. Educational Visit Service advice if required
C	All activities in, on, close to water. All visits abroad. All recognised hazardous activities. Any school-led activity within the scope of AALA. Activities with significant Health and Safety concerns. Activity leaders require NGB qualifications.	Headteacher/Setting Leader and EVC - approval. Governors- approval. LA-approval. Supported by appropriate forms.  Forms to be forwarded to LA at least 2 months before intended date of visit (UK) or 3 months if abroad.	Headteacher/Setting Leader and EVC - approval. Governors- approval. Educational Visits Service advice and recommendations if required.

6.3.2 Sending Notification and Approval Forms to Educational Visits Team

As outlined in the table above, Visit Leaders (for schools/settings where LCC is the employer) are required to send certain forms for certain visits to the Educational Visits Team. This is outlined in the table below. Fax and email ensure this process is as efficient as possible. Please note that the Courier will only pick up from schools/settings fortnightly. This will result in a slower response time.

Remember: all other types of schools can send forms to the Educational Visits Team and receive advice, support and recommendations via a comprehensive feedback form. This service is accessible via the CfBT Education Services Professional Development Agreement (PDA) package or via Contracts for Service outside of the PDA..

Visits within the UK: forms should be sent 2 months prior to departure.

Visits Abroad: forms should be sent 3 months prior to departure.

Category	Type	Forms to be Sent to LA	Preferred Method
Category A and B Day Visits	Approval WITHIN SCHOOL/SETTING	VIA THE SCHOOL/SETTING ONLY. ADVICE FROM THE EDUCATIONAL VISITS TEAM CAN STILL BE ACCESSED TO SUPPORT THIS DECISION	N/A
Category B Residential Visits	Notification	Lev 1A or Lev 1B Lev 2a/2b (or other risk assessment templates) Itineraries Group lists etc not required.	<p>Fax to 01522 51 60 33</p> <p>Email as attachments: evsupport@cfbt.com (please ensure all sections are completed and forms are appropriately signed)</p> <p>Forms to be forwarded to the Educational Visits Service at least 2 months before intended date of visit (UK) or 3 months if abroad.</p>
Category C	Approval (Community/VC School/Setting) Recommendations (Academy, Foundation or VA School/Setting)	Lev 1A or Lev1B Lev 2a/2b (or other risk assessment templates) Itineraries Specific information linked to the visit (contact the Educational Visits Team for advice) Group lists etc not required	
Category C Visits (Exchange Visits Abroad)	Approval (Community/VC School/Setting) Recommendations (Academy, Foundation or VA School/Setting)	Lev 1A or Lev 1B Lev 2a/2b (or other risk assessment templates) Itineraries Exchange Visits Questionnaire Specific information linked to the visit (contact the Educational Visits Team for advice) Group lists etc not required	

HOME

6.4 PLANNING CHECKLIST FOR VISITS

This checklist is to help the Head of Establishment, EVC and visit leader to ensure that all reasonable and practicable steps have been taken to:


- Manage the health, safety and welfare of young people and staff;
- Maximise the educational benefits for young people;
- Maintain effective organisational and administrative records.



Where the Head/Setting leader occupies all these roles, as is the case in many of our schools/settings, it would be helpful to discuss this checklist with a designated governor or sub-committee or other member of the school/setting staff.


The satisfactory completion of the checklist could become therefore, the basis on which final approval for the visit is given at school/setting level.

A Planning Checklist is outlined in [Section 9](#), form LEV 7.

	Recommended Stages (order can change)	 Schools/settings should adapt their own checklist to reflect local circumstances.	Relevant Forms Including Links to the Website
1	Party Leader	Is there a clearly identified and competent Visit Leader who has overall responsibility for planning and organisation? Is a deputy leader identified?	See Section 6.1.5
2	Purpose	Has the visit a clearly defined educational purpose related to the aims and needs of the school or the personal and social development of the young people?	
3	Age, aptitude, experience	Is the visit suited to the age, aptitude and experience of the young people?	See Section 8

4	Location	Is the location of the visit appropriate to the activity to be undertaken?	See Section 8
5	Information Gathering	Has the visit leader made a preliminary visit to check arrangements and suitability?	See Section 6.5
6	Advice and initial approval	Has the party leader discussed plans with any other suitably qualified and experienced staff? Which Category of visit does this fall within? Has the party leader consulted the Educational Visits Team for Category C visits? If using Commercial, Charitable or Private facilities, is use being made of form LEV 11? Has the visit been initially approved by the School/Setting?	LEV 1A or 1B LEV 11
7	Staff/Volunteers	Are members of staff suitably qualified and experienced for leading the proposed activities within the visit? Are all adult roles clearly defined? Is the adult / pupil ratio within the guidelines for the proposed activities? Will this include male and female supervision? If residential, will all accompanying adults be DBS checked?	See Section 6.1.6
8	Consent	Has parental consent been obtained for all young people under 18? (form LEV 3) See Section 7.7.	LEV 3
9	The Programme	Will all young people and staff have appropriate clothing and equipment? Will another provider be offering additional clothing or equipment? Are alternative activities available, planned and risk assessed?	See various sections
10	Finance and	Have adequate arrangements been made for finance?	See various

	Insurance	<p>Is there a contingency fund where necessary? Have parents/carers in receipt of certain benefits been informed of arrangements for claiming partial reimbursement? (No LA funds are held for this purpose) Has additional insurance been arranged?</p>			sections
11	General Organisation	<p>Is there an adult with appropriate First Aid qualifications assisting with supervision? Is the party leader aware of any dietary, medical or other special needs? Is appropriate transport available? Has use been made of the form for agreements with PCV Operators? (form LEV 13) What use will be made of mobile telephones? (staff and young people)</p>			LEV 13
12	Pre-Visit Briefings, Will briefings be held for?:	<p>Young people: Code of Behaviour ID card What to do if lost Emergency re-call and action Groupings Relevance to prior and future learning.</p>	<p>Parents/carers: Location and times Supervision arrangements Code of Conduct Activities to be undertaken Transport arrangements Equipment list including prohibited items</p>	<p>Staff: Responsibility is continuous Anticipation of hazards Code of Conduct and pupil expectations Pupil groupings Lists of names in sub-groups Location of all relevant documentation. Own copies of all emergency contact information Accident- emergency procedure. 'Panic Card' Emergency contact point at home base.</p>	

12	Communication.	<p>Has all relevant information been retained at the establishment? Has a named point of contact been identified at base in the event of an emergency? Is there an emergency telephone number known to all adults at base and at the site? A 24 hour contact number is needed for residential visits in the UK or abroad. Has a system of communicating with parents/carers been arranged for notifying events such as late return?</p>	See various sections
13	Risk Assessment	Have all aspects of the visit been properly risk assessed and the findings recorded by the party leader? (forms LEV 2a, 2b)	LEV 2a LEV 2b
14	Emergency Procedures	Will a copy of the emergency procedures been taken by all adults accompanying the party?	
15	Formal Approval (Community, VC, LA schools)	<p>Have the proposals been reported to, or approved by, the Headteacher/Setting Leader, Governors, EVC and Educational Visits Team (if required)?</p>  <p>Forms to be forwarded to evsupport@cfbt.com at least 2 months before intended date of visit (UK) or 3 months if abroad.</p>	LEV 1B
16	After the visit	<p>Have arrangements been considered for appropriate follow-up work, evaluation and contacts on return? This should include: Report back to head or line manager; Copy of the Evaluation Form to be retained by the school/setting. Forms sent to the Education Visits Adviser if there has been a SIGNIFICANT ISSUE/NEAR MISS; Collate and file all documentation; Enter visit details in school log; Produce a balance sheet; Ensure any accident forms are sent to the LA (LA schools/settings only) - form PO3.</p>	LEV 5

6.5 PRELIMINARY VISITS

Wherever possible, a preliminary visit to a site or venue should be made prior to a visit taking place. The ideal person to undertake the preliminary visit is the visit leader, accompanied by at least one other person who will be acting in a supervisory role on the visit. Headteachers/Setting Leader and Governing Bodies should recognise the importance of reconnaissance visits and do their best to build sufficient non-teaching time into individual timetables to allow such pre-visits to take place.

If it is not reasonably practicable to carry out a pre-visit, then all reasonable steps should be taken to gather as much information as possible from such sources as the centre itself, Tourist Information Centres, the internet, schools/settings who have visited in the past, National Park Offices, etc. It is good practice for organisers to note the following details when undertaking a pre-visit:

- Routes, journey times and facilities en route (toilets, rest areas, food stops);
- Bus / car access and parking;
- Permission, authorisation, access to sites and facilities;
- Guides, maps, information, worksheets etc.;
- Accommodation details, layout of building etc.;
- Meals, routines, duties for young people, codes of behaviour, local rules;
- Washing, drying, recreational facilities;
- Fire precautions and fire drill;
- Disabled facilities, access, mobility around the building if appropriate;
- Equipment needed;
- Location and phone numbers of local services such as, hospital, doctor, dentist, coastguard, mountain rescue;
- On-site security arrangements. ([See Section 8.9](#))

This information can then actively inform risk assessments, supervision arrangements, daily routines etc. and help the pre-visit meetings for parents/carers to be well informed with specific details, leaflets, photographs and other information. This will convey a good sense of organisation and preparation to parents/carers and help to allay any fears or concerns they may have.

SECTION 7 ORGANISATION

7.1 SUPERVISION

For every visit, there should be a visit leader who manages the whole visit. For individual activities within the visit, small groups each with a supervisor, is an effective way of ensuring safe supervision. The group supervisor would normally be a **competent** teacher or other **competent** member of a school/setting's staff. Supervision is most effective when:

- The aims and objectives of the visit are clearly understood by all
- The visit and activities have been carefully risk assessed and will be managed safely
- Supervisors and young people have contributed to the overall plan
- Clear behaviour guidelines are agreed and laid down
- Supervisors have an agreed level of knowledge of the young people including any special needs, medical needs or disabilities
- Each activity has an alternative (plan B)

7.1.1 Additional Staff

If a supervisor is not a member of establishment staff, he or she will normally have provided evidence of competence to manage a group and appropriate DBS clearance.

Appropriate DBS clearance is expected for residential visits but may not always be necessary in other circumstances. It is strongly recommended that schools/settings make use of the volunteer letter in Section B11 of the School Administration Handbook and keep a record of all authorised volunteers.

The need to have such volunteers DBS checked will be determined by the frequency and type of contact they have with young people. Appropriate DBS checks must be obtained for all volunteers who have regular unsupervised contact with children. Schools/settings must follow the statutory guidance - Keeping Children Safe in Education and School/Setting policies when making decisions relating to appropriate DBS checks.

Keeping Children Safe in Education: for schools and colleges
Keeping Children Safe in Education: for school and college staff (part 1)

<https://www.gov.uk/government/publications/keeping-children-safe-in-education--2>

Further and up to date guidance should always be checked and can be obtained from your relevant Human Resources section.



For every visit, other than short excursions with very small groups into the immediate locality, it is recommended that each party is accompanied by an **additional** adult deemed competent to assist in supervision by the head of establishment. Thus where supervision ratios suggest 1:10, this in effect should be read as 2:10 as the risk of illness or injury to a sole supervisor would be assessed as resulting in a group being unsupervised.



Mixed parties engaged in visits involving **overnight stays** should be accompanied by **both male and female** staff. **For secondary school aged young people, this is crucial.**

For primary young people, it **may be** acceptable for single-gender staff only to accompany mixed parties provided that the Headteacher/Setting/Leader, parents/carers and staff are satisfied that this is an appropriate arrangement.

7.1.2 Types of Supervision



Supervision can be close or remote but it is always 24 hours.

Close supervision is occurring when the group remain within sight and contact of the supervisor.

Remote supervision usually occurs as part of a planned range of activity subject to certain controls. This requires careful planning and is only suitable in certain situations.

'Down time' or recreational time for example during the evenings may involve close or remote supervision but it **should never be unsupervised**. The visit leader and supervisors continue to be in charge and responsible for the health, safety and welfare of the young people.

7.1.3 Supervision Ratios



There are many variables that may govern the appropriate staffing ratio for a particular visit or activity. A condition or set of circumstances may be more hazardous to one group or individual than another. This highlights the crucial role of Risk.

Assessment in the supervision aspects of off-site activities and it should never be assumed that the ratios given in this document as guidelines will always be adequate, they are the **minimum** as put forward by this document (for visits abroad please ensure you refer to the all visits abroad ratios). The following circumstances may apply to warrant an improvement on the minimum ratio:

- The age, gender, attitude, ability, behaviour and competence of the group members
- The extent to which young people with special needs are included in the group
- The nature of any planned specialist activities
- The experience and expertise of the adults
- The duration and nature of the journey
- The need to maintain adequate supervision throughout the programme



The following ratios are put forward therefore as minimum guidelines:

Category	Stage	Ratio	Minimum Staffing
Category A visits	Early Years Foundation Stage	SEE Section 7.1.4	SEE Section 7.1.4
	Key Stage 1	2:15 - 1:8 thereafter	1QT/CE** + 1 other competent member of school/setting staff.
	Key Stage 2	2:24 - 1:10 thereafter	1QT/CE** + 1 other competent member of school/setting staff.
	Key Stage 3+	2:35 - 1:15 thereafter	1QT/CE** + 1 other competent member of school/setting staff.
Category B visits	Early Years Foundation Stage	SEE Section 7.1.4	SEE Section 7.1.4
	Key Stage 1	2:12 - 1:8 thereafter	1QT + 1 other competent member of school/setting staff.
	Key Stage 2	2:20 - 1:10 thereafter	1QT + 1 other competent member of school/setting staff.
	Key Stage 3+	2:25 - 1:12 thereafter	1QT + 1 other competent member of school/setting staff.
Category C visits (UK) *SEE COMMENT BELOW	Early Years Foundation Stage	SEE Section 7.1.4*	SEE Section 7.1.4*
	Key Stage 1	2:10 - 1:5 thereafter*	2QTs*
	Key Stage 2	2:15 – 1:8 thereafter	1QT + 1 other competent member of school/setting staff.
	Key Stage 3+	2:20 – 1:8 thereafter	1QT + 1 other competent member of school/setting staff.
All visits abroad	Key Stage 2+	2:15 – 1:8 thereafter	2QTs

IMPORTANT: MINIMUM RATIOS ARE JUST ONE PART OF EFFECTIVE SUPERVISION. THE QUALITY OF ADULTS IS CRUCIALLY IMPORTANT. SCHOOLS/SETTINGS MUST CONSIDER IMPROVING RATIOS IF THERE IS A PARTICULAR NEED.

*Early Years Foundation Stage and Key Stage 1 children will not normally engage in Category C activities. Exceptions might include a carefully planned visit to the beach/coastline or a shallow and narrow local stream. Ratios must be assessed. The Educational Visits Team will expect to see before approval clear control measures, a suitable location and experienced adults accompanying the visit. (See [Section 8.4](#) if considering a visit to the coastline).

**QT = Qualified Teacher

CE = Competent Employee (see below)

Competent Employers

In response to workforce remodelling schools/settings are likely to have competent employees/non-teachers, including Higher Level Teaching Assistants, who have the potential to lead **small groups of young people on low risk local Category A Visits**. It is the responsibility of the Headteacher/Setting Leader to establish an employee's competency and to decide as to whether certain individuals can lead such visits. **Care should be taken to evaluate the visit in relation to group size, location, duration, distance from school/setting, weather and group type (including behaviour and age)**. It is recommended that these employees have a wide experience of educational visits, have been observed leading a similar visit, are familiar with this policy and guidance document and have attended the CfBT Education Trust Visit Leader Training. **Schools must liaise with Human Resources to ensure these employees have appropriate contracts and conditions of service. Employees must be in agreement and not have any concerns about undertaking such visits.**

These visits will essentially be local visits (walking distance very close to the school/setting, short duration and a small number of pupils with no significant needs).

It is still recommended that qualified teachers lead whole class Category A visits AND ALL OTHER KINDS OF VISITS. [See also Section 8.1.](#)

In some circumstances, such as for school/setting swimming, transport only ratios may be higher than those described here as young people will be in a tightly controlled and managed environment for a relatively short period of time on the coach.

7.1.4 Supervision – Early Years Foundation Stage

This section should be read in conjunction with the Statutory Framework for the Early Years Foundation Stage, September 2014, in particular Section 3, The Safeguarding and Welfare Requirements.

7.1.4.1 Key extracts from the September 2014 statutory framework

It is essential that visit leaders are familiar with: The general Safeguarding And Welfare requirements (Section 3)

The provider must take all necessary steps to keep children safe and well.



Statutory requirements



Educational Visits Service Guidance

Area	Key Extracts (where they have relevance for Educational Visits)
<p>Child Protection</p>	<p>3.4-3.6 Providers must:</p> <ul style="list-style-type: none"> • have and implement a policy, and procedures, to safeguard children • designate a practitioner to take lead responsibility for safeguarding children in every setting • train all staff to understand their safeguarding policy and procedures <p>It is recommended that any mobile phone and camera used should be those designated by the school. Photographs should be downloaded as soon as possible and stored securely.</p>
<p>Suitable people</p>	<p>3.9 – 3.25 Providers must</p> <ul style="list-style-type: none"> • ensure that people looking after children are suitable to fulfil the requirements of their roles • have effective systems in place to ensure that practitioners, and any other person who is likely to have regular contact with children, are suitable • not allow people whose suitability has not been checked, including through a disclosure and barring service check, to have unsupervised contact with children being cared for. • ensure that all staff receive induction training including information about emergency evacuation procedures, safeguarding, child protection, the provider’s equality policy, and health and safety issues. • ensure at least one person who has a current paediatric first aid certificate
<p>Staff: Child Ratios</p>	<p>3.28 -3.43 The provider must:</p> <ul style="list-style-type: none"> • ensure children are adequately supervised and inform parents/and or carers about staff deployment • ensure for overnight care relevant ratios continue to apply and at least one member of staff must be awake at all times (see next page for ratios outlined in the statutory framework)

Health	<p>3.42-3.45 The provider must:</p> <ul style="list-style-type: none"> • promote the good health of children attending the setting. • have a procedure, discussed with parents and/or carers, for responding to children who are ill or infectious. • have and implement a policy, and procedures, for administering medicines • obtain information about any special dietary requirements, preferences and food allergies that the child has, and any special health requirements
Risk assessment	<p>3.63 Providers must:</p> <ul style="list-style-type: none"> • have a clear and well-understood policy, and procedures, for assessing any risks to children’s safety, and review risk assessments regularly. • determine where it is helpful to make some written risk assessments in relation to specific issues, to inform staff practice, and to demonstrate how they are managing risks if asked by parents and/or carers or inspectors. Risk assessments should identify aspects of the environment that need to be checked on a regular basis, when and by whom those aspects will be checked, and how the risk will be removed or minimised
Outings	<p>3.64 Children must be kept safe while on outings. Providers must:</p> <ul style="list-style-type: none"> • obtain written parental permission for children to take part in outings. • assess the risks or hazards which may arise for the children, and must identify the steps to be taken to remove, minimise and manage those risks and hazards. The assessment must include consideration of adult to child ratios. The risk assessment does not necessarily need to be in writing; this is for providers to judge. <p>3.65 Vehicles in which children are being transported, and the driver of those vehicles, must be adequately insured.</p> <p>It is recommended that all risk assessments are in writing for all off-site activities and outings. Providers should take essential records and equipment on outings, for example, contact telephone numbers for the parents/carers of children on the outing, first aid kit, a mobile phone. Records should be kept about vehicles in which children are transported, including insurance details and a list of named drivers. Drivers using their own transport should have adequate insurance cover.</p>
Information and records	<p>3.67 Providers must:</p> <ul style="list-style-type: none"> • maintain records and obtain and share information (with parents and carers, other professionals working with the child, and the police, social services and Ofsted as appropriate) to ensure the safe and efficient management of the setting, and to help ensure the needs of all children are met.

It is essential that children are provided with safe and secure environments in which to interact and explore rich and diverse learning and development opportunities. Providers need to ensure that, as well as conducting a formal risk assessment, they constantly reappraise both the environments and activities to which children are being exposed and make necessary adjustments to secure their safety at all times. Ratios will vary depending on a range of factors including: type of group; staff qualifications, competency and experience; environment; type of activity; weather conditions and distance travelled.

The table below provides recommended minimum ratios for EYFS Educational Visits. For a description of each category see section 6.3.1

Early Years Providers (other than childminders)	General comments relating to ratio from the EYFS Document (more applicable to onsite activities)	<p>Recommended <u>minimum</u> ratios (adult:children) for Educational Visits</p> <p>Improved ratios to those in column 2 will normally be required. A detailed risk assessment must be carried out to determine the most appropriate ratio. (Staff and adult qualifications must be followed as outlined in column 2.)</p>
<p>For children aged under two (Section 3.31 from the statutory framework):</p>	<p><i>There must be at least one member of staff for every three children;</i></p> <ul style="list-style-type: none"> • <i>at least one member of staff must hold a full and relevant level 3 qualification, and must be suitably experienced in working with children under two;</i> • <i>at least half of all other staff must hold a full and relevant level 2 qualification;</i> • <i>at least half of all staff must have received training that specifically addresses the care of babies; and where there is an under two-year-olds' room, the member of staff in charge of that room must, in the judgement of the provider, have suitable experience of working with under twos.</i> 	<p>All visits Minimum 1:2</p> <p>(Setting requirement 1:3)</p>
<p>For children aged two (Section 3.32 from the statutory framework):</p>	<p><i>There must be at least one member of staff for every four children;</i></p> <ul style="list-style-type: none"> • <i>at least one member of staff must hold a full and relevant level 3 qualification; and</i> • <i>at least half of all other staff must hold a full and relevant level 2 qualification.</i> 	<p>All visits Minimum 1:2</p> <p>(Setting requirement 1:4)</p>

<p>For children aged three and over in registered early years provision where a person with Qualified Teacher Status, Early Years Professional Status or another suitable level 6 qualification is working directly with the children (Section 3.33 from the statutory framework):</p>	<p><i>There must be at least one member of staff for every 13 children; and</i></p> <ul style="list-style-type: none"> • <i>at least one other member of staff must hold a full and relevant level 3 qualification.</i> 	<p>Category A visits <i>Min. 1:6</i> Category B/C visits <i>Min. 1:4</i></p> <p><i>(Setting requirement 1:13)</i></p>
<p>For children aged three and over in registered early years provision where a person with Qualified Teacher Status, Early Years Professional Status or another full and relevant level 6 qualification, is not working directly with the children (Section 3.34 from the statutory framework):</p>	<p><i>There must be at least one member of staff for every eight children;</i></p> <ul style="list-style-type: none"> • <i>at least one member of staff must hold a full and relevant level 3 qualification;</i> • <i>at least half of all other staff must hold a full and relevant level 2 qualification.</i> 	<p>Category A visits <i>Min. 1:4</i> Category B/C visits <i>Min. 1:3</i></p> <p><i>(Setting requirement 1:8)</i></p>
<p>For children aged three and over in independent schools, where a person with Qualified Teacher Status, Early Years Professional Status or another full and relevant level 6 qualification, an instructor, or another suitably qualified overseas trained teacher, is working directly with the children (Section 3.35 from the statutory framework)</p>	<p><i>For classes where the majority of children will reach the age of 5 or older within the school year, there must be at least one member of staff for every 30 children;</i></p> <ul style="list-style-type: none"> • <i>for all other classes there must be at least one member of staff for every 13 children; and</i> • <i>at least one other member of staff must hold a full and relevant level 3 qualification.</i> 	<p>Category A visits <i>Min. 1:6</i> Category B/C visits <i>Min. 1:4</i></p> <p><i>(Setting requirement 1:30 or 1:13 -see column 2)</i></p>
<p>For children aged three and over in independent schools, where there is no person with Qualified Teacher Status, Early Years Professional Status or another suitable level 6 qualifications, no instructor, and no suitably qualified overseas trained teacher, working directly with the children (Section 3.36 from the statutory framework):</p>	<p><i>There must be at least one member of staff for every eight children;</i></p> <ul style="list-style-type: none"> • <i>at least one member of staff must hold a full and relevant level 3 qualification; and</i> • <i>at least half of all other staff must hold a full and relevant level 2 qualification.</i> 	<p>Category A visits <i>Min. 1:4</i> Category B/C visits <i>Min. 1:3</i></p> <p><i>(Setting requirement 1:8)</i></p>

<p>For children aged three and over in maintained nursery schools and nursery classes in maintained schools (Section 3.37 from the statutory framework): See below for reception classes</p>	<p><i>There must be at least one member of staff for every 13 children;</i></p> <ul style="list-style-type: none"> • <i>at least one member of staff must be a school teacher as defined by Section 122 of the Education Act 2002 and the Education (School Teachers' Qualifications) (England) Regulations 2003; and</i> • <i>at least one other member of staff must hold a full and relevant level 3 qualification.</i> 	<p>Category A visits Min. 1:6 Category B/C visits Min. 1:4</p> <p><i>(Setting requirement 1:13)</i></p>
<p>Reception classes in maintained schools are subject to infant class size legislation. The School Admissions (Infant Class Size) Regulations 2012 limit the size of infant classes to 30 pupils per school teacher while an ordinary teaching session is conducted. 'School teachers' do not include teaching assistants, higher level teaching assistants or other support staff. Consequently, in a normal teaching session, a school must employ sufficient school teachers to enable it to teach its infant classes in groups of no more than 30 per school teacher ' (Section 3.38 from the statutory framework)</p>		<p>Category A visits Min. 1:6 Category B/C visits Min. 1:4</p> <p><i>(Setting requirement 1:30)</i></p>
<p>Some schools may choose to mix their reception classes with groups of younger children, in which case they must determine ratios within mixed groups, guided by all relevant ratio requirements and by the needs of individual children within the group. In exercising this discretion, the school must comply with the statutory requirements relating to the education of children of compulsory school age and infant class sizes. Schools' partner providers must meet the relevant ratio requirements for their provision (Section 3.39 from the statutory framework).</p>		

7.1.5 Supervision and Special Needs

It is important that use is made of the current Individual Education Plan of young people with special needs when determining the degree of support they need for educational visits. As with all young people, those with special needs should be encouraged to participate in a wide-ranging and rich variety of activities to promote their cognitive and physical development.

Education visits for young people with special needs should be a natural extension of their cross curricular, class-based experiences. The visit leader should have a good knowledge of the physical, intellectual, sensory and behavioural needs of the group and the implications of these for the planned activities. Parents/carers should be consulted and kept informed at all stages of the planning process. All other supervising adults should be involved in discussing the type of support young people will require in a given setting. Where instructors at a centre are to be used, the respective roles must be clearly identified and the instructor informed of the needs of the group. Ideally some time should be given to establish a relationship with the group.

For young people with moderate or severe learning difficulties, activities should be presented in a 'step by step' fashion with clear explanations of what is expected.

For young people with emotional and behavioural needs it is vitally important that secure relationships between the visit leader, activity leaders and the group have been established. Procedures for withdrawing young people from activities should be arranged with instructors if the situation demands.

For young people with physical needs, medical and dietary requirements must form part of the risk assessment and any emergency medical procedures need to be fully understood by all staff on the visit and any centre staff working with the group.



Where a pupil requires 'one to one' support, such supervisors should not be counted in the overall supervision ratio.

For further information, refer to <https://www.gov.uk/government/publications/health-and-safety-advice-for-schools>

7.1.6 Additional Young people

It is **not recommended** that young people other than those who are young people at the school/setting, participate in off-site visits and activities. Where staff and accompanying adults wish to take their own children with them on a school/setting visit, it should be with the agreement of the Headteacher and Governors, and the knowledge of parents/carers.

Such staff and / or accompanying adults should not then be counted in the overall supervision ratio of the visit.

Where agreement is granted to include other young people on school/setting visits, it should be done so on the basis of the same expectations of participation, behaviour and code of conduct.

Any additional young people should, therefore, be of a comparable age to that of the main party.

7.2 HEALTH AND FIRST AID

First aid should form part of any risk assessment. The level of first aid cover should be decided at the planning stage to help determine staffing arrangements and the possible impact of the only trained first aid person being out of school/setting on a visit. It is recommended that at least one of the supervisory staff on an off-site visit should have as a minimum, undertaken the 1 day, 'Emergency Aid in schools' course and have at least, a good working knowledge of first aid.

The level of staff competence which may be required, will depend on a variety of factors including:

- The nature of the programme;
- Whether the programme includes adventurous activities;
- The numbers in the party;
- The availability of 'outside' first aid assistance, e.g. at an activity centre;
- The environment and whether it is abroad or remote;
- The health and medical needs of the group;
- The fitness levels of individual young people (and staff)

Visit leaders, potential visit leaders and supporting adults who are likely to undertake the supervision of activities and particularly for work in remote areas, are encouraged to attend a course run by the Red Cross, St. John Ambulance or other HSE recognised provider of training. Both the [British Red Cross](#) and [St. John Ambulance](#) will provide institution-based training.

It is strongly recommended that access to first aid, hospitals, dentists and other emergency services such as coastguards and mountain rescue posts is identified and recorded during preliminary visits by school/setting staff.

7.2.1 First Aid Kit

For all visits, appropriate first aid kits should be available. Contents should be checked regularly to ensure they are fully stocked and all 'use by' items are 'in date.' All staff and young people should know how to contact the emergency services both in this country and abroad where relevant. Where the party splits into smaller groups for ease of supervision or for specific activities within the programme, each group leader should carry a first aid kit stocked with the recommended contents.

Contents of first aid kits.

The contents of travelling first aid kits should be appropriate to the context in which they are used. At least the following should be included:

- Card giving general first aid guidance;
- Twenty individually wrapped sterile adhesive dressings (assorted sizes);
- Two sterile eye pads;
- Four individually wrapped triangular bandages (preferably sterile);
- Six safety pins;
- Six medium sized (approximately 12cm x 12cm) individually wrapped sterile unmedicated wound dressings;
- Two large (approximately 18cm x 18cm) sterile individually wrapped unmedicated wound dressings;
- One pair of disposable gloves.

Polythene survival bags to help treat or prevent exposure are useful extra items for activities in open country.

First Aid Kits specifically for schools/settings can be purchased from organisations such as [St John Ambulance](#).

7.2.2 Miscellaneous Medical Hazards

Staff need to be aware that some illnesses, though nationally uncommon, may result from activities in the outdoors. Examples are Weil's Disease through contact with certain water pollutants and Lyme Disease through infested ticks. Where illness or unusual symptoms occur, perhaps after returning from a visit, medical advice should be taken and possible links established.

Exposure to the sun should be part of risk assessment for all off-site activities and not just for the 'high summer' months. Particularly at altitude, and increasingly during spring and autumn, appropriate measures should be taken to guard against over exposure to the sun. These measures may include head, neck, arm and leg covering, high factor (15+) sunscreens, sunglasses and access to shade. Loose fitting, tightly woven clothing and wide brimmed hats could also prevent over exposure. Particular attention should be given to individuals whose colouration makes them more prone to the effects of the sun.

It is advisable to always carry adequate supplies of water or warm drinks where weather conditions might change rapidly. For further First Aid information, please refer to Section 16 of the Lincolnshire County Council Health and Safety Manual and Section A 20 of the School Administration Handbook.

7.2.3 Young people with Medical Needs

Every effort should be made to include young people with medical needs in school/setting visits. Special attention should be given to appropriate supervision ratios and additional safety measures may need to be addressed during planning. Arrangements for taking medication and ensuring sufficient supplies need establishing. It is particularly important for the visit leader to ensure:

- All staff engaged in the visit are aware of any medical needs with details recorded on the summary sheet. ([see Section 9 form LEV 9](#));
- The needs of young people have been discussed with parents/carers
- That any specific facilities or arrangements for such young people are raised at the planning stage with residential centres
- Activity leaders are reminded of specific issues prior to the start of an activity

Please refer to: <https://www.gov.uk/government/publications/health-and-safety-advice-for-schools>

The administration of medication should be in line with the School/Setting's own policy. Useful guidance can be found in the following publication: <https://www.gov.uk/government/publications/health-and-safety-advice-for-schools> **Early Years Foundation Stage Settings MUST also consult the latest Statutory Framework appropriate advice.**

Other key government publications should be consulted:

<https://www.gov.uk/government/publications/managing-medicines-in-schools-and-early-years-settings>
<https://www.gov.uk/government/publications/first-aid-in-schools>

7.3 CHILD PROTECTION

Key contact:	Lincolnshire Children's Services
Key websites:	LCC Child Protection Site: http://www.lincolnshire.gov.uk/parents/family-support/safety/child-protection/ The Lincolnshire Safeguarding Children Board: http://www.lincolnshire.gov.uk/lscb
Email:	CSC_SSD@lincolnshire.gov.uk
Telephone:	During office hours - 8.45am to 5.15pm (4.45pm Friday) telephone 01522 782111 In an emergency, outside office hours (including weekends or Bank Holidays) telephone 01522 782333

Everybody who works with young people, such as school/setting staff, parents/carers and other adults, should be able to recognise, and know how to act upon, indicators that a child's welfare or safety may be at risk. [The Lincolnshire Safeguarding Children Board \(LSCB\) website](#) provides up to date in-depth information and [procedures](#). This gives clear guidance on what to do if it is suspected that a young person may be suffering, or may be at risk of suffering significant harm. All staff should familiarise themselves with this website and the associated documents. **Early Years Foundation Stage Settings MUST also consult the latest Statutory Framework for the Early Years Foundation Stage.**

Schools/settings must also adhere to the latest statutory guidance from the Department for Education. A new document was published March 2015.

Keeping Children Safe in Education: for schools and colleges
Keeping Children Safe in Education: for school and college staff (part 1)
<https://www.gov.uk/government/publications/keeping-children-safe-in-education--2>

All schools/settings should have in place a Child Protection Policy and staff should be familiar with this and the procedures for reporting concerns about a child's welfare. Child Protection in Education Visits is simply an extension of this. However, there are some important things to consider in addition:

- Young people away from their usual environment, especially on residential visits, may feel safer to disclose abuse. Staff should be familiar with how to respond to disclosure.
- Whilst away from the usual establishment setting, staff may be in a position to observe indicators of abuse that they would not ordinarily witness, eg, bruising on torso observed during a swimming activity.
- Schools/settings taking young people on an educational visit whose names are on the Child Protection Register, must liaise with LSCB to establish any factors that may have implications for the visit. This should be done through the school/setting's designated teacher/person for child protection. If a child is subject to a care order, LSCB will need to consent to any proposed trip.
- Residential visits in particular can provide opportunity for young people with sexually inappropriate behaviour to abuse others. It is therefore essential that a safe care plan has been agreed where a young person is known to have exhibited such behaviour. (LCC can advise on this.)
- All members of staff and volunteer helpers having unsupervised contact with children and young people, must be subject to appropriate DBS checks. Any adult accompanying a residential visit must be subject to an appropriate DBS check. See the Keeping Children Safe in Education document for additional guidance on appropriate DBS checks – Section 3:

Keeping Children Safe in Education: for schools and colleges

Keeping Children Safe in Education: for school and college staff (part 1)

<https://www.gov.uk/government/publications/keeping-children-safe-in-education--2>

Additional guidance can be obtained via Lincolnshire County Council.

- Particular care must be taken when supervising young people in the less formal setting of school visits. The more relaxed relationships that may promote successful activities, can be misinterpreted by young people. Standards of professional conduct should be no different to those which apply within schools/settings.

If somebody believes that a young person may be suffering, or at risk of suffering significant harm, then she / he should always refer his or her concerns to LSCB and / or the Police. This should normally be done through the school/setting's designated teacher/person. If, for example, an allegation of abuse is made whilst on a residential trip and the designated teacher/person or the Headteacher/Setting Leader is not available, the Lincolnshire Children's Services should be contacted directly. If it is outside office hours then the case should be referred immediately to the emergency duty team or the Police.

It is also essential that staff make written records of the disclosure and sign and date it. Staff should not attempt to investigate any allegation themselves as this could seriously jeopardise any subsequent child protection investigation carried out by statutory agencies. The school/setting's designated teacher/person should be informed of the action taken at the earliest opportunity.

7.4 INSURANCE (LCC Insurance Scheme ONLY)

Academy Schools are not able to join this Insurance Scheme and must seek their own insurance.

Key contact:	Mandy Knowlton-Rayner, Insurance Manager, Lincolnshire County Council
Email:	insurance@lincolnshire.gov.uk
Telephone:	(01522) 55 3675

Lincolnshire Maintained Schools: With effect from 1 April 2005, LCC Educational Visits insurance is provided automatically as part of the Contents and Related Insurance Scheme. **So long as the school/setting buys back the Contents and Related Insurance, they will be covered for all visits, both in the UK and overseas, including all hazardous activities they may undertake.**



Schools/settings should note that certain overseas countries are excluded from the cover unless agreed with insurers beforehand. These include West Bank, Gaza and the Occupied Territories, Afghanistan, Algeria, Chechnya, Iraq, Somalia and Liberia. **This list is revised continuously and must ALWAYS be checked early on in the planning stage.**

The policy covers cancellation and curtailment charges, personal accident, personal effects including money, medical expenses incurred overseas, including the cost of returning an individual to the UK, and any legal liability incurred. Voluntary adult helpers on visits are included in the cover as “responsible adults” and are subject to the benefits of the policy as members of the party.

For legal advice Lincolnshire maintained schools can contact Leigh Middleton at leigh.middleton@lincolnshire.gov.uk

Since the cover is automatic, there is no requirement for a proposal form to be completed for each journey and equally there is no risk of a journey being missed and insurance not being in place. **Exceptions and further detail is available with the documentation sent to schools/settings in September 2014 by Lincolnshire County Council.**

Some school/setting journey package deals come with built in insurance cover. It is not necessary to make use of this facility although it may not be possible to obtain a reduction in the total cost of the package by excluding the insurance cover if it is included automatically. In such cases there will be a duplication of cover and, if a claim arises, the Insurance Section will, if required, deal with the question of a contribution from the two insurers involved.

7.5 TRANSPORT AND TRAVEL

General considerations

Transport arrangements for educational visits require much careful thought and planning to ensure that passenger comfort and safety is maintained throughout. Some of the factors to take into account at the planning stage are:

- That the journey is appropriate to the nature of the visit
- The time and distance of the journey
- Stopping points for refreshments and toilets
- Supervision
- The effect of the weather
- Insurance arrangements
- The journey is interesting and boredom is avoided
- The nature of the young people, behaviour, medical needs, disabilities etc.
- Contingency plans for breakdown, delays, emergency expenses etc.
- Parents/carers' need to be informed of intended travel arrangements

Particular attention should be given to situations where school/setting parties are in crowded areas with the general public in places such as motorway service stations, railway stations, ferries, ferry terminals and airports. In these locations the priorities are to maintain safe supervision and sensible conduct of young people at all times and to minimise the risk of annoying the travelling public. Controls such as distribution of supervisors, limited movement in small groups, gathering in a clearly defined area, regular head counts and litter clearance will all help to maintain a calm and well managed atmosphere. It is at times such as these when the benefit of a clear code of conduct for young people is realised.

7.5.1 Coach Travel

It is recognised that many schools hire coaches directly from operators known to them and used by schools/settings on a regular basis. The visit leader is responsible for ensuring that coaches and buses are hired from a reputable company. It is recommended to use a Lincolnshire County Council approved operator of PCVs for visits. Professional operators of buses and coaches are legally required to be licensed. Schools/settings should ensure that the operator has the appropriate public service vehicle (PSV)

operators' licence. (form LEV 13). When booking transport, the visit leader should ensure that seat belts are available for young people. One seat belt per pupil must be provided. Seat belts **must** be fitted to coaches which carry children, they are not legally required on buses. Buses where seat belts are not fitted are not normally appropriate for long journeys.

The visit leader should find out what arrangements exist to provide a replacement coach in the event of breakdown and particularly what the arrangements include if the breakdown is abroad.

Some providers of school/setting tours and educational visits include the coach as part of their service to schools/settings. The same regulations apply and it would be prudent for party leaders to check the above with the tour operator in such situations.

A good working relationship with the driver is helpful for the smooth operation of the journey or visit. The visit leader should discuss arrangements with the driver for refreshment and toilet breaks and ensure the young people behave accordingly so as not to distract the driver. Supervisors should position themselves at points throughout the coach with one designated to be next to the emergency exit.

The driver should not normally be counted in calculating the supervision ratio for the visit.

If any member of the group uses a wheelchair, the visit leader should ensure that the transport used has appropriate access and securing facilities.

7.5.2 Minibus Travel

Schools/settings wishing to transport smaller numbers of young people may decide to make use of a minibus, which may be their own, owned by another school or hired from a commercial organisation.

However sourced, the use of minibuses is governed by strict regulation which is only outlined in this document.

All establishments proposing to use a minibus are strongly advised to consult the Fleet Services Group (TSG) and speak to Steve Roberts (Fleet Technical Advisor) on 01522 553925 for expert advice and guidance.

Additional good practice guidance on the use of minibuses can be obtained from ROSPA. It is recommended that schools/settings following this guidance. Any questions/queries should be directed to Steve Roberts on telephone number above.

<http://www.rospa.com/roadsafety/adviceandinformation/minibussafety/>

7.5.2.1 Minibus: Licensing and Permits

IMPORTANT: A letter was sent to all Lincolnshire Schools in 2014, including academies, about permits. Additional copies of this letter can be obtained from the contact person above.

Hire or reward encompasses any payment in cash or kind by (or on behalf of) passengers, which gives them a right to be carried. Thus a visit where parents/carers make a contribution to the cost of the visit, which gives young people a right to be carried on the minibus, constitutes hire or reward. (Such contributions may only cover the costs of the vehicle.)

Hire or reward then necessitates schools/settings to apply for a Section 19 permit (even for hired vehicles) which entitles organisations such as school/seeing groups to operate without having to comply with the PSV (Public Service Vehicle) operator licensing system or PCV (Passenger Carrying Vehicle) driver licensing.

Driving entitlement requirements for mini buses adapted to carry nine to sixteen passengers

Regardless of the size of vehicle, all drivers of a vehicle operated under a Permit 19 **MUST** be 21 or over.

The rules covering the driver licensing requirements depend on size of vehicle and when the driver passed their test.

i) Drivers who hold a passenger carrying vehicle (PCV) driver's licence, a PCV Community licence or a Northern Ireland licence corresponding to a PCV driver's licence may drive, and be paid for driving a permit vehicle of any size:

Drivers who do not hold one of the above licences must comply with the following requirements.

ii) Drivers granted a full licence to drive vehicles in category B (car, not automatic) **before 1st January 1997**. These drivers were automatically granted additional entitlement D1, to drive a small bus not used for hire or reward. For as long as they hold D1 entitlement, these drivers may drive a small bus of any weight used under the Section 19 permit.

iii) Drivers who passed their car test **on or after 1st January 1997**. Drivers who pass their car test on after this date are no longer granted D1 entitlement. Category B entitles them to drive a small bus but only if all of the following conditions are met:

- The driver has held a full category B car licence for at least two years;
- The driver is over 21 yrs;
- The driver receives no payment or other consideration for driving other than out- of-pocket expenses; ***If driving is written into a person's contract of employment then that person's role is deemed to be for Hire and Reward so does not meet the requirements***
- The vehicle has a maximum gross weight not exceeding 3.5 tonnes (4.25 tonnes including specialised equipment for the carriage of disabled passengers);
- No trailer is towed

Section 19 Permits have no validity outside the UK.

7.5.2 Minibus: Sports Fixtures

Many recent concerns have centred on the use of minibuses for transporting teams. Organisers should refer to the section above and below for general information regarding licences, permits and taking a minibus abroad.

It is recommended by Lincolnshire County Council that all staff who are qualified to drive minibuses and plan to run sports teams take a Vehicle Familiarisation and Driver Assessment module. Training programmes and courses (MIDAS) are offered by the Road Safety Partnership. Contact Russ Morgan or Kelvin Alman on 01526 861170 or 07789 980913 for more details.

Additional considerations are:

- Pre-departure checks – currently the driver is responsible for the roadworthiness of the vehicle
- Young people should enter/exit the vehicle via the side doors from/onto the pavement
- Store bags securely under seats leaving no obstructions on the floor as potential tripping hazards
- Seat belts to be worn at all times
- Availability of a mobile phone and emergence contact numbers
- Smoking and alcohol bans must be observed
- Location of first aid box and fire extinguisher is known by the driver
- A strict behaviour code should be in force and applied rigorously

Supervision on Minibuses

The Community Transport Agency states that it is good practice for all minibus journeys to be accompanied by an additional competent adult to act as a supervisor. The driver cannot be expected to pay full attention to the road and act as supervisor for the group. It is also worth considering whether the additional adult should also be qualified to drive the minibus – is it reasonably foreseeable that the driver could become ill or injured due to the activity on site?

However, it is recognised that many fixtures would be lost if LCC applied this recommendation for a supervisor to be present on every journey. Therefore it is suggested that schools consider the following and properly risk assess the journey:

- evaluate the nature of the route.
- consider the length of the route (as a general 'rule of thumb' a journey of over 30 minutes may create additional risks and will warrant the inclusion of a second competent adult).
- assess the nature of the group/ individuals and the potential for problems
- consider staff competency
- ensure access to a mobile phone, emergency contact and the availability of a competent member of staff back at school to respond to an emergency.

Important: It may be that a particular group with specific group/individual needs would require an additional adult on even a short-journey. Schools/settings know their young people and staff and decisions should be made accordingly.

7.5.2.3 Minibus: Visits Abroad

There are significant driver licensing difficulties for trips abroad in minibuses. A decision to go ahead should not be taken until the school/setting responsible for the trip has assessed all the legal and safety risks and made arrangements accordingly.

Driving. There are specific problems for most UK drivers once they take a minibus abroad. In the rest of the EU, it is standard for all minibus drivers to take a further test, the PCV (Passenger Carrying Vehicle) test. Exemptions from this test, which apply in the UK through permit 19, do not apply in the EU. Drivers require the full D1 category not the limited national entitlement D1 (101) and will need to take the PCV driving test on a minibus, known as a PCV test in order to remove the restriction on their D1 entitlement.

The cost of the full PCV test can be up to £1000 and since 2 drivers will be required, trip organisers may have to consider a number of alternatives:

- Using vehicles with less than 9 seats (excluding the driver)
- Finding existing PCV drivers to participate (with appropriate clearance checks)
- Using public transport in the countries visited
- Cancelling the visit

If the staff members have the necessary driver requirements and the decision is made to take the minibus abroad then:

- a) If the minibus is the property of the school (or on long term hire) and driven by a member of staff such journeys can be carried out under an **own account certificate**. These are valid for up to 5 years and available from IRHO. The certificate only relates to that vehicle and cannot be transferred between vehicles.
- b) If the vehicle is hired (e.g. Just for the period of the visit) or you are travelling outside the EU then a **waybill** must be completed and carried during the journey.

Additional documentation for European travel:

Vehicle Documents. The driver should ensure that the following documents are available for inspection at all times:

- EU Journey Form (Waybill, ASOR Waybill, or Own Account Certificate, (EU only)
- Vehicle registration document
- Insurance certificate
- European accident form
- Green Card (advisable in EU though not strictly necessary, vital outside EU)
- Vehicle owner letter of consent

Driver Documentation

- Current driving licence with appropriate entitlement, PCV
- International driving permit (with appropriate translation for certain countries)
- Full passport
- EHIC cards for whole group

- Tachograph. Most tachographs are now digital and each driver needs their own digital tachograph driver card available from the DVLA

Other Considerations

Important: Drivers must know the rules and regulations for all countries travelled through and consider: driver hours; tachograph laws; emergency equipment to be carried; speed limits; vehicle light regulations; alcohol and tobacco laws; tyres regulations e.t.c. It is recommended that drivers contact the CTA to find out the up to date requirements for each country/journey. www.ctauk.org

What if?...

After all the above considerations, there must be thought given to what would happen should the vehicle become stranded abroad, what alternatives are available? How will the party continue or return home?. It is important to realise that you may be subject to a spot check by police and it has been known for a party to be left by the roadside and the minibus impounded after a check revealed inadequate paperwork. Additionally, in the event of an accident, incomplete paperwork could render insurance invalid.

For further information, all who are considering the use of minibuses for school/setting visit transport, should contact either the Fleet Services group on 01522 553046 or 01522 553925 or the Community Transport Association, Hyde, Cheshire, Tel: 0845 130 6195 advice@ctauk.org and request the relevant leaflets which explain requirements in greater detail.

7.5.3 Private Vehicles

The use of a private vehicle belonging to **a member of staff or volunteer** for transporting young people on school/setting visits is not encouraged. Schools/settings should aim to use a coach or minibus whenever possible.

If a school/setting approves the use of private vehicles then it is the staff member or volunteer's responsibility to ensure that their vehicle is in a roadworthy condition and that their insurance is adequate for all eventualities. It is essential that insurers be informed that the vehicle is to be used on authorised school/setting business.

The head of establishment or party leader will need to ensure that where **staff or volunteers'** cars are used to transport young people, the following considerations have been met:

- That all parents/carers have been informed and give their consent
- That all staff/volunteer drivers are responsible for ensuring the roadworthiness of their vehicle, the health and safety of the young people carried with regard to seat belts and to maintaining suitable insurance cover (LEV 12). **The school/setting should request to see, verify and record the respective driving licence, MOT, Tax, Insurance certificates and any other relevant documentation**
- That volunteer drivers are not put in a position where they are alone with a young person
- That the implications of the Children Act with regard to Child Protection and preventing unsuitable persons from having access to children are adhered to.

7.5.4 Public Transport

Buses

Notify the appropriate operator regarding time and route of intended travel, numbers of young people and staff. Travel outside peak times wherever possible.

Rail

Where possible, reserve seats in advance to keep the party together. Ask station officials about the stopping position of the reserved carriages so that young people can be gathered accordingly. Ensure a clear code of conduct for travelling and include plans for buffet and toilet procedures. Highlight to young people, all possible hazards and the consequences of inappropriate behaviour.

Air Travel

Identify an appropriate meeting point and base in the airport for the group. Keep luggage in sight and leave no items unattended. Ensure the party co-operates with all security procedures and stress the importance of not carrying anything on behalf of others.

Ferry Travel

Some problems with school/setting groups on ferries have been experienced in recent years. Visit leaders should ensure they are familiar with the procedures of individual ferry companies and ensure they are followed. The visit leader is responsible at all times and young people should be supervised throughout the crossing. For short crossings, this will normally mean keeping the group together. Clear guidelines in the code of conduct should lay down expected behaviour and include the instructions regarding alcohol, tobacco and going outside on deck.

The Underground

Schools/Settings MUST plan in advance for all underground journeys. Organise young people into small groups, each with a responsible adult. Set up clear systems for young people left behind, missed stop etc. Obtain tickets in advance to avoid delay at booths or ticket machines and barriers. Travel in single file on escalators with an adult at either end. Stay well back from platform edges until compartment doors have opened. Avoid travel between 7.30am and 9.30am and from 4.30 to 6.30pm.

7.6 FINANCE

The Headteacher/Setting Leader should arrange for parents/carers to be given reasonable notice of the costs of visits. For some visits, especially visits abroad, more than a year's notice may be required. Details of cost breakdown should be included in the initial letter to parents/carers. Secure procedures should be established for the managing of all income relating to the visit and all associated expenditure. Banking and accounting systems must be well understood by all involved in the collection and recording of income and receipts obtained against all expenses before and during the visit to enable a final balance sheet to be produced.

7.6.1 Charging

Updated Department for Education Advice was published in November 2013.

<https://www.gov.uk/government/publications/charging-for-school-activities>

Schools and relevant settings must adhere to this guidance.

The Education Reform Act of 1988 set out which aspects of education may or may not be subject to charging.

The following key principles apply:

- Education provided wholly or mainly during school hours should be provided without charge.
- Off-site activities can be financed through voluntary contributions. This should not discriminate against parents/carers who do not contribute. If there are insufficient contributions, the visit may be cancelled.
- Programmes which take place wholly or mainly outside school hours and are not part of statutory curriculum provision are considered 'optional extras' and may be charged.
- Parents/carers in receipt of certain types of benefit may be entitled to the remission of the board and lodging element of those visits which are not 'optional extras'.

All letters regarding school visits should explain which principles apply and that for visits wholly or mainly in school time, contributions are voluntary. Arrangements for remission of charges should also be explained (School Administration Handbook, Section B9).

The LA holds no funds for supporting the remission costs of visits. All such funds are delegated to schools/settings and governing bodies should specify how the cost to school would be met.

Educational visits may be financed from special fund-raising events, donations, sponsorship, subsidy from school/setting or other funds or charitable grants.

7.6.2 VAT

All educational visits are non-business activities of local authorities. Thus any VAT incurred on admission fees, hotel accommodation, lunches etc. can be reclaimed. It is not necessary to recharge VAT to young people. Headteachers/Setting Leaders will determine whether a visit is educational. Even though collections and payment of expenses for visits may be transacted through voluntary funds, authorities can reclaim any input tax and refund this to the voluntary funds. However, schools/settings should ensure that the relevant records are held with their own accounting records and not kept by the treasurers of voluntary funds.

Queries regarding any aspect of VAT in relation to educational visits can be directed to the Mouchel Finance Team. VAT is not normally recoverable for visits abroad.

7.7 INFORMATION TO PARENTS/CARERS INCLUDING CONSENT

The latest Government advice relating to advice is as follows:

'Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required.

Written consent is usually only requested for activities that need a higher level of risk management or those that take place outside school hours. The Department has prepared a "one-off" consent form which schools can ask parents to sign when a child enrolls at

the school. This will cover a child’s participation in any of these types of activities throughout their time at the school. These include adventure activities, off-site sporting fixtures outside the school day, residential visits and all off-site activities for nursery schools which take place at any time (including during school holidays or at the weekend).’

[Department for Education Advice.](#)



In consultation with local Headteachers and EVCs this Employer Policy and Guidance document suggests consent is important to reassure parents/carers/guardians and is a useful check to ensure information has been received. It is therefore **recommended** that schools/settings consider the following model as a sensible and manageable approach to obtaining consent:

Cat	Example of visit / activity	Recommended Method of Obtaining Written Consent	Notes
A	<p>Visits and journeys with risks similar to that of everyday life, e.g. historic sites, museums, local walk, theatre, fieldwork in the locality.</p> <p>Can also include sport fixtures and regular trips to another local school (as long as the activity/activities do not fall into Category B)</p>	<p>Local: Annual Consent Form. Distant: Individual Consent Form specific to each visit.</p>	<p>The school/setting creates one annual form for updating consent relating to educational visits, photographs and medication, capturing emergency phone numbers and up to date medical information. It is good practice to define the visit type by giving examples. Parents/carers/carers must still be informed of where their young person will be at all times. Consent for travelling in cars should always be obtained. Visits further away from the school/setting may require an individual consent form.</p>
B	<p>Outdoor / Adventure Activities in more remote areas having an element of risk, e.g. Walks below 600m altitude. Activities in countryside environments. Any visit with a residential element within the UK, e.g. Activity Centre. Specialised activities require NGB Qualification for leaders/instructors.</p>	<p>Day or residential: Individual Consent Form specific to each visit.</p>	<p>This ensures all parents/carers/carers have received information about the visit including times, location, food and clothing requirements and a further opportunity to update the school/setting with any new medical information.</p>

<p>C</p> <ul style="list-style-type: none">All activities in, on, close to water.All visits abroad.All recognised hazardous activities.Any school-led activity within the scope of AALA.Activities with significant Health and Safety concerns.Activity leaders require NGB qualifications.	<p>Day or residential: Individual Consent Form specific to each visit.</p>	<p>This ensures all parents/carers/carers have received information about the visit including times, location, food and clothing requirements and a further opportunity to update the school/setting with any new medical information</p>
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Parents/carers/carers should be told where their child will be at all times and of any extra safety measures required.



Written consent is always required for nursery age children.

The list below contains the information, which should be supplied in writing, to parents/carers prior to obtaining their written consent to a visit either in this country or abroad. Parents/carers need less information for day visits but if the return is after school hours or some activities are of a hazardous nature, most of what is included below will be required.

Local visits, on foot, in school/setting time to undertake non-hazardous activities such as a visit to the library or church (local Category A Visits), will normally be covered by annual parental/carer consent: if the school/setting has for example, a regular programme of local visits in school time where children are never far from school/setting, it may be more appropriate to obtain consent for these visits in principle at the beginning of the school/setting term or year. As the visit approaches, a reminder should be sent along with any important information (selected from the list below).

For other types of visits, as the visit approaches, a detailed letter and individual consent form can be sent to parents/carers.

The information for parents/carers for should include:

1. Dates.
2. Objectives of the visit or activity.
3. Times of departure and return.
4. Meeting for parents/carers; time, location, agenda. What to do if unable to attend.
5. Method of travel, including name of travel company or private hire company.
6. Accommodation details, contact numbers in emergency.
7. Details of leader and other staff.
8. Names and status of additional adults. (eg. Parent)
9. Details of planned activities, specify clearly any hazardous activity.
10. Charges, remissions or voluntary contributions, what they do and do not cover.
11. Methods of payment, deposits, cancellations etc.
12. Insurance arrangements, what the cover entails. Ensure parents/carers know they may view schedule on request.
13. Clothing list and include prohibited items.
14. Pocket money details.
15. Code of conduct.
16. Medical form for all visits and written consent for emergency treatment.
17. Emergency home contact details and alternatives.

The organisation of parents/carers' meetings for residential visits is strongly recommended to give the necessary assurances and to give parents/carers the opportunity to ask questions which may not be specifically covered in the preliminary and subsequent information.

It should be noted that when parents/carers give consent, they do so on the basis of the information available at the time. If an activity in the programme has to be changed for whatever reason, parents/carers should be informed, the nature of the substitute activity explained and consent given for the revised programme.



Activities may be dropped from a programme but no new ones may be added without consent.

Parental/Carer Letter templates are available via The School Administration Handbook: BO8 Educational Visits.

7.8 EMERGENCY PROCEDURES

The advice and guidance given in this section is based upon the former [Government/publications/health-and-safety-advice-for-schools](#)

Careful reference should also be made to the document “**Coping with Emergencies**” Section B4, School Administration Handbook, which provides guidance for those who may be involved in managing a serious or major incident. **Party Leaders should carry a copy of this section of the document and its reference cards.**

In the event of an incident resulting in serious or fatal injury this recommended framework of procedures should be followed:

- Establish the nature and extent of the emergency;
- Make sure all other members of the party are accounted for and are safe;

If there are injuries, immediately establish their extent, so far as possible, and administer appropriate first aid. The Health and Safety Manual (Section B 01, 16) gives additional information about first aid:

- Establish the name(s) of the injured and call whichever emergency services are required;
- Advise other party staff of the incident and that emergency procedures are in operation;
- Ensure that an adult from the party accompanies casualties to hospital;
- Arrange for one adult to remain at the incident site to liaise with the emergency services until the incident is over and all group members are accounted for;
- Control access to telephones until contact is made with the contact person and until he/she has had time to contact those directly involved.
- Give full details of the incident i.e:
 - Name:
 - Nature, date and time of incident:
 - Location of incident:
 - Details of injuries:
 - Names and telephone numbers, those involved and future contacts; Action taken so far:

For serious incidents where the media may be involved, try to identify alternative telephone numbers at “home” and “off-site base” as other lines will quickly become jammed. It is not for the visit 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 contact person should alert both Lincolnshire County Council’s Children’s Services (if an appropriate school/setting) and the Headteacher/Setting Leader, giving details as above. They may identify further actions or help required (which might include financial assistance). Alternative and additional telephone lines may need to be identified at an early stage; The Headteacher/Setting Leader should arrange to contact parents/carers of all party members. It is also the Headteacher/Setting Leader’s responsibility to act as a link between the group involved, the Chair of the Governors, LCC and the parents/carers.

For those schools/settings required to report to LCC and it is necessary to talk to the media, the Director of Children’s Services will do this initially, via the Press Office at County Offices. The Director may then designate an officer to act as the ongoing point of contact with the media to whom all involved should direct questions and requests. This person will also liaise with the emergency services.

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

Legal liability should not be discussed or admitted; and All accident forms (including Form PO3, “Lincolnshire County Council: Report of an injury, dangerous occurrence or incident” for schools/settings required to do so for LCC) should be completed and insurers and Health and Safety Executive or local inspectors contacted if appropriate. (Incidents involving “near misses” should also be reported using Form PO3). [See Section 9.](#)

7.8.1 Emergency Procedure Abroad

In the event of an emergency arising whilst a group is abroad, it is recommended that the advice given below and in Section B4 of the School Administration Handbook, ‘Coping with Emergencies’ be followed:

- After making initial arrangements for the immediate care of any sick or injured participant(s), the visit leader should, without delay, inform the contact person by telephone

- In the event of death or serious injury the British Consul should also be contacted. They can provide an English speaking person with knowledge of local services and regulations and access to emergency funds
- In the case of a medical emergency in a European Union country, full use should be made of the European Health Insurance Card (EHIC) which has now replaced the E111, for reciprocal health insurance arrangements, but these may still require payment to be made for medical treatment, with all or part of the cost being reclaimed subsequently. An emergency method of payment should always be available for this purpose
- Where medical treatment is given, it is essential that copies of doctor's letters, bills, hospital admission forms, etc should be kept for the UK insurers
- If it is necessary for a sick or injured person to be separated from the remainder of the group, one of the accompanying adults should always remain with the sick or injured person
- The contact person should offer the next of kin any assistance that may be required in making travel arrangements. This is especially important if the next of kin may be unaccustomed to travelling abroad and/or under stress

SECTION 8 ENVIRONMENTS AND ACTIVITIES

8.1 LEADERSHIP

The visit leader is the key person in the management and conduct of all off-site visits, whether it is a local visit in a low risk environment or hiking in remote country with the potential for serious consequences if risks are not well controlled.

Whatever the situation, the visit leaders' skills are paramount. This will have a major influence on the success of the activity and on young people' attitudes to further experiences in similar activities or environments in the future.

In deeming a visit leader competent to lead a visit or activity, the Headteacher/Setting Leader and / or EVC will need to take account of the following factors:

- Familiarity with the nature of the environment to be visited, an awareness of potential changes in that environment and the consequences of change
- Experience of working with young people in such environments
- Realistic expectations of their own and young people' abilities
- The ability to anticipate potential hazards and act accordingly
- Skills in managing young people and other adults

HOME

- Adequate knowledge of the group to be led and an awareness of their specific needs
- Knowledge of legislation, good practice guidance and advice (Government, OEAP, LA and school/setting)
- Up to date experience of off-site work with young people

There is no substitute for actual personal experience and there are no short cuts to the gaining of it. It is therefore particularly important that inexperienced staff wishing to become leaders have worked with more experienced colleagues in the type of locations visited by the school/setting before taking on the role themselves.

8.2 TRAINING

Training in the principles and practices of Educational Visits could be at either an individual or institution based level. All staff involved in off-site work with young people and young people should consider appropriate training to complement and support the establishment's programme of visits.

Courses covering areas such as First Aid, Risk Assessment, Basic Expedition Leadership and specific adventure activities, are run regularly by recognised providers, such as St. John Ambulance, Red Cross, RoSPA, National Governing Bodies and HSE. Contact details are provided on the website. CfBT Education Trust provides EVC and Visit Leader Training.

<https://lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service>

It is important to remember that certain qualifications and training will need updating on a regular basis, eg, First Aid. **Schools/settings should keep a record of staff training** to assist the EVC in determining training needs. This record could be a component of the school/setting Education Visit Log.

Procedures for the induction of NQTs and new members of staff with respect to Educational Visits should be in place in each establishment to enable standard practice to be maintained. It is recommended that at least annually, Educational Visits is discussed at whole staff level to review past work, monitor and update procedures and to keep accepted good practice in 'high profile' for all members of staff. The EVC will play the leading role in ensuring that due regard is given to Educational Visits within the establishment's identified agenda for improvement as set out in the Development/Improvement Plan.

No funds are held centrally for training, thus any training costs will need to be met from within the school/setting's own identified resources.

8.3 WALKING IN OPEN COUNTRY

No formal qualification is required to lead groups in countryside environments where, as a general rule, the group stays below 600m altitude and is not more than about 30 minutes from the minibus, other form of transport or place of habitation. However, before leading groups into such environments, a range of factors will need to be considered prior to embarking on a day in open country:

- The experience and competence of the visit leader
- The ability of the group matches the terrain to be encountered
- The planned route and possible 'escape' routes for emergencies; (Plan 'B')
- The equipment available
- The clothing to be worn
- Drinks, food and emergency rations
- The time of year and weather conditions (current and predicted)
- The degree of supervision and control of the group
- The size and specific needs of the group
- The means of communication

As with all activities, the visit leader's judgement is paramount. All equipment should be checked before setting off to ensure that all the young people and adults have the stipulated items such as additional clothing for weather changes and adequate footwear. It would also be good practice to monitor the group at breakfast on a residential visit and note any individuals not having a sufficient intake of food for a strenuous day in open country.

Regular head counts should be carried out and the pace of the group should be that of the slowest member. The leader controls the frequency and duration of rests, which should only start when the last pupil has arrived at the rest point.

Visit leaders should set an easy pace on climbs; maintain a constant awareness of how individuals are coping with the terrain and alert young people to such hazards as the dangers of running downhill and the effects of severe winds.

Vigilance should be maintained over the putting on of extra clothing after a hard climb in cold or windy weather, even if the rest period is short.

Skills such as scanning the terrain to pick out safer routes or potential hazards, scanning the group, involving them in navigation, decision making and pointing out topographical features will all help to maintain a purposeful and enjoyable atmosphere rather than reducing the walk to a 'footslogging' exercise.

It is also important for visit leaders to be aware of the impact that the presence of their group may have on the general public, particularly in popular areas, this can be a feature of the 'Code of Conduct' where appropriate.

Groups should be well informed about the 'Country Code' and understand the need to observe its conventions, especially regarding closing gates, walking in single file across pastures and the need to help to prevent footpath erosion.

8.4 WATER BASED ACTIVITIES

8.4.1 Water: ESSENTIAL GUIDANCE

The Outdoor Education Advisers Panel reports that water-based activities have been responsible for the majority of fatalities on educational visits.

Headteachers/Setting Leaders, EVCs and Group Leaders need to be aware that all activities, whether deemed adventurous or not, have additional risks when water is present.

This does not mean that educational establishments should avoid water activities at all costs, but organising and supervising staff must be fully aware that changes in weather or water conditions will have a rapid effect on the hazards encountered by the group. The need to have a suitable and risk assessed Plan 'B' thus becomes paramount when the on-site assessment indicates that the planned activity is no longer possible.

Activities such as beck scrambling, gorge or river walking and jumping from heights into water are defined by AALA and HSE as 'Combined Water and Rock Activities' It is vital that visit / activity leaders have specific competences, knowledge and experience in such activities and environments. Many sites for these activities will necessitate the leader holding

qualifications such as Mountain Instructor Certificate, (MIC), Mountain Instructor Award, (MIA), British Mountain Guide, (BMG) or a BCU Swift Water Rescue Technician Award. Routes to and from the location should always be part of the risk assessment.

Schools/settings are strongly advised not to self-lead any such activity.

For further detailed information and guidance please refer to:

www.aala.org/guidance_details.php/pArticleHeadingID=79

www.hse.gov.uk/pubns/etis13.pdf

Very detailed risk assessments should accompany all requests for approval.

On no account should staff without recognised NGB qualifications lead any specialist water activity.

Cold water immersion is a major contributory factor in drowning fatalities in this country and exposure is a real hazard if young people are cold and wet.

One control measure for any water-based activity should be quick access to a complete set of dry, warm clothing for all participants, whether or not the activity takes place at a recognised centre with qualified instructors.

It is strongly recommended schools/settings NOT to include recreational swimming in any open water (sea, lake, river, canal, pond) as part of any programme of outdoor or adventurous activity.

In this respect, this policy and guidance is more stringent than <https://www.gov.uk/government/publications/health-and-safety-advice-for-schools>

8.4.2 Entering 'natural waters'

It is recognised however, that 'cooling off' in natural waters could be a sensible and low risk activity if properly organised and be an appropriate element of a day's programme in certain localities.

With this in mind, the following guidance is offered should schools wish to consider '**cooling off in shallow water**' as a possible activity.

Common sense must prevail. Emphasise that the activity is **NOT** swimming.

- Check the location. Is it a river bed? Is the depth regular, rocky or containing any submerged hazards? What is downstream?
- Check the water flow. Is it fast or slow moving?
- Check the water condition. Are any obvious pollutants present? eg a dead sheep just upstream!
- Check entry and exit points. Are they accessible for the whole group?
- Demarcate an area in which 'cooling off' will take place
- Brief the students about expectations and limitations prior to entry
- Manage entry and exit, especially if access is not straightforward

Paddling in the sea is not banned but visit leaders must carry out ongoing risk assessment prior to, and constantly during, any of their party 'cooling off' in the sea. This is of course in addition to the written risk assessment prepared prior to departure.

The following guidance notes are the minimum expectations to be assessed by the visit leader before a decision is taken to enter the sea:

- A qualified beach lifeguard on duty
- An additional person within the group able to carry out resuscitation
- A minimum ratio in line with category 'C' visits, 2:15 and 1:8 thereafter
- A thorough knowledge of local conditions such as tides, currents, shelving or uneven beaches
- An agreed and restricted zone and depth, dependent upon age and the nature of the group
- Emergency signals, both visual and audible to be employed for ending the activity
- Clear and decisive actions for any student not adhering to the expectations
- The ability to account for all young people at all times

This latter point is crucial in that often, young people other than those in the school/setting party will be present on a beach. Supervising adults must therefore be able to identify members of their own party constantly.

If doubts remain after considering all relevant factors, do not allow young people to enter the water.

For activities such as rock pooling, beachcombing and cliff top walks, group leaders must bear the following in mind:

- The effects of tides, riptides and sandbanks
- Warning signs and flags
- Establishing a base on the beach with a simple, audible recall system
- Look out for hazards such as sewage outfall pipes, glass or other dangerous objects
- Be aware of exit routes from the beach and check access in advance
- Ensure young people do not dig in sand dunes, throw rocks or other objects or stray beyond clearly demarcated boundaries
- Consult the local coastguard, harbour master, lifeguard or tourist information for specific advice and guidance on local hazards

8.4.3 Hotel Pools

Swimming in hotel pools should only be conducted under the same standards as school/setting swimming with attention given particularly to supervision levels and lifeguard cover. It is not normal practice for hotels to provide constant lifeguard cover therefore if the hotel pool is going to be used, supervising staff will require the appropriate and up to date qualification.

The recommended qualifications are either, the National Rescue Award for Swimming Teachers and Coaches, (NRASTC), or preferably, National Pool Lifeguard Qualification, (NPLQ).

Schools/settings using hotel pools under the above conditions should make arrangements to have sole timetabled use of the pool to avoid other guests increasing numbers in the water and making effective supervision more difficult.

To lessen the burden on school/setting staff; **It is strongly recommended that all water-based activities take place at recognised centres with suitably qualified and experienced staff.**

8.5 FARM VISITS

Farms can be dangerous places, even for the people who work on them. Risk assessments should take account of possible exposure to machinery, hazardous substances and infections through contact with animals, animal droppings or polluted water.

It is recommended that only visits to establishments specifically organised to cater for visitors are undertaken so that the appropriate safeguards from the inherent hazards are in place. Additionally, suitable toilet and washing facilities, first aid provision and a clean, safe place to eat, would be necessary before a visit was arranged.

In Lincolnshire, a growing number of farms are becoming interested in accommodating school groups to support a range of curriculum studies. Many have undergone training supported by Farming and Countryside Education (FACE, www.face-online.org.uk) and have the CEVAS (Countryside Educational Visits Accreditation Scheme) certificate. Schools/settings should look for this accreditation when considering organising a farm visit

The Lincolnshire Agricultural Society is also a very useful source of information with several member farms able to take school groups.

www.lincolnshireshowground.co.uk

For additional information, Please refer to: [Government/publications/health-and-safety-advice-for-schools](#)

8.6 ACTIVITY CENTRES

Activity Centres can provide a range of adventurous activities in a controlled environment and give young people a taste of a variety of pursuits normally beyond the means of many schools/settings. Schools/settings may find such centres attractive since qualified staff lead activities and teachers are usually in the role of supporting adult during the activities themselves. Additionally, some centres organise all travel arrangements for schools/settings, send representatives to parents/carers meetings, provide videos for use in school and a range of other services that make the whole 'package' a useful way of combining adventurous activities with a residential experience.

Since 1 October 1997, commercial providers of climbing, water sports, trekking and caving activities have been required to undergo inspections of their safety management systems and become registered as being licensed.

A licensed provider does not necessarily have to hold a licence for all its activities though the majority of activities will be covered by Health and Safety legislation.

Prior to seeking final approval at the appropriate level for the visit to go ahead, group leaders should obtain assurances, in writing, that procedures regarding Health and Safety, Risk Assessment, Staffing, Insurance, Licensing and Accommodation are in order. A sample form (LEV 11) is outlined in [Section 9](#) for this purpose.

Many activity centres have risk assessments available on line and schools/settings should make use of this facility to reduce the need for expensive paperwork, time and postage. (One well-known group running many activity centres has over 200 pages of risk assessments.)

It is important to remember that the visit leader and staff of the school/setting retain ultimate responsibility for young people at all times during adventure activities, even when the group is under instruction by the provider's staff. The provider is responsible for the safe running of the activity. There must be clear understanding of the roles and responsibilities by all involved, including the young people and hand-over and hand-back procedures should be in place. If a member of school staff feels the young people are being placed at risk then they should approach the instructor who should assure, amend or terminate the activity and then inform the centre manager.

A residential visit to an Activity Centre would normally be considered category 'B', but the chances are that some of the activities undertaken could be rated as category 'C' for example, climbing or canoeing are regular features of such programmes.

If these activities take place at a **self-contained centre** and are **on site** then category 'B' classification is acceptable. However, if the centre uses the natural environment such as crags or lakes **off site**, for hazardous activities, this will fall into category 'C' and thus require approval at county level.

For further information, Please refer to: [Government/publications/health-and-safety-advice-for-schools](#)
Schools/settings are also encouraged to make use of the Adventure Activities Licensing Authority (**AALA**) for any advice regarding centres, licences and activities. <http://www.hse.gov.uk/aala/>.

8.7 HAZARDOUS ACTIVITIES

8.7.1 Definition of Hazardous Activities

It is not possible to give a comprehensive list of all hazardous activities as many variants of the 'traditional' outdoor pursuit type of activity are constantly appearing. For the purposes of this document, the term will apply to all activities listed below that come under the remit of the [Adventure Activities Licensing Authority](#) (AALA) and require National Governing Body (NGB) qualifications to lead or instruct.

There are four broad groups of activities that are covered by AALA licensing. They are defined in the Adventure Activities Licensing Regulations 2004, regulation 2(1):

Caving

Caving is the exploration of underground passages (other than those principally used as show-places open to the public) in parts of mines which are no longer worked; or in natural caves where the exploration of those passages requires, in order to be carried out safely, the use of rock climbing or diving equipment or the application of special skills or techniques. Caving is sometimes also known as pot-holing.

Mine exploration is different from caving. Some of the techniques are the same but the hazards can be quite different.

Climbing

Climbing is climbing, traversing, abseiling or scrambling over natural terrain or outdoor man-made structures (other than structures designed for such activities) which requires, in order to be carried out safely, the use of equipment for, or the application of special skills or techniques in, rock climbing or ice climbing.

The most commonly encountered climbing activities are rock climbing, abseiling, ice climbing, gorge walking, ghyll scrambling and sea level traversing. Climbing walls are exempt from licensing, as are abseiling towers and ropes courses.

Trekking

Trekking is journeying on foot, horse or pedal cycle or skiing over terrain which is moorland or more than 600 metres above sea level; and from which it would take more than 30 minutes travelling time to reach any accessible road or refuge; but it does not include skiing on a prepared and marked-out ski-run.

The most familiar trekking activities include hill walking, mountaineering, fell running, orienteering, pony trekking, off-road cycling and off-piste skiing.

Water sports

Water sports are the use on specified waters of:

- Canoes, kayaks or similar craft propelled or steered by paddles held in the hand (but excluding rowing-boats propelled or steered by oars)
- Rafts (including those which are inflatable or which are improvised from various materials but excluding those propelled by means of a motor or towed by a motor-boat)
- Sailing boats, windsurfers, sailing dinghies or other craft whose principal means of propulsion is the wind but excluding craft whose construction, equipment and use of which require a certificate in line with the Merchant Shipping Act 1995 or any regulations made under it.

The most familiar watersport activities include canoeing, kayaking, dragon boating, wave skiing, white-water rafting, improvised rafting, sailing, sailboarding and windsurfing. This list is not exhaustive and you should ask the AALS if you are unclear if a particular activity is licensable. For any of these activities to be licensable, they need to be done on 'specified water' – this is the sea, tidal waters (e.g. estuaries), inland waters more than 50 metres from the nearest land excluding any island or on turbulent inland waters.

Additionally, the insurance policy provided by the county council lists the following activities beyond those defined under the terms of AALA:

Assault Courses, Boxing, Flying or Gliding, Hang Gliding, Ice Hockey, Judo, Motor Sports, Parachuting, Scuba Diving and '**Any other obviously hazardous activity.**'



It is strongly recommended that school/settings do not take part in activities that involve the use of firearms.



Staff who do not possess the appropriate NGB qualification should not lead, instruct or coach any activity within the above definitions.

For specific advice on National Governing Body standards, qualifications, supervision ratios etc, schools are advised to contact the relevant organisation

8.7.2 Adventure Activities Licensing Authority AALA



The Government was recommending to abolish AALA. This is currently on hold while they 'further consider how to develop a regime that reflects the level of risk of participating in adventurous activity while ensuring users are reassured about a provider's safety management arrangements.'

8.8 LEARNING OUTSIDE THE CLASSROOM QUALITY ASSURANCE BADGE

The LOtC Quality Badge, awarded by the Council for Learning Outside the Classroom, provides a national award combining the essential elements of provision – learning and safety – into an recognisable and trusted accreditation scheme for ALL types of learning outside the classroom provider organisation. It is recommended that schools look for the LOtC Quality Badge when planning educational visits to gain assurance.

Website addresses: <http://www.lotc.org.uk/lotc-quality-badge/> and <http://lotcqualitybadge.org.uk/>

Council for Learning Outside the Classroom ensures safety and rigorous standards in LOtC provision by:

- Maintaining stringent criteria and processes in awarding the LOtC Quality Badge, self regulated by the industry which spans 10 sectors from sacred spaces to adventurous activities and expeditions overseas
- Developing the LOtC Quality Badge package, reacting to industry demand
- Pushing up the quality of the provision, gradually raising the accreditation standard

HOME

8.8.1 School Travel Forum

www.schooltravelforum.com

Founded in 2003, the School Travel Forum is a democratic, not for profit organisation of leading school tour operators that promotes good practice and safety in school travel. In late 2008 the STF were appointed by the LOtC Council to act as the Awarding Body for the Study & Sports Tours Sector of the LOtC Quality Badge and the standards adopted as the benchmark for all companies operating in that sector. The additional requirements of the Quality Badge were adopted by the STF and written into their Code of Practice and Safety Management Standards.

The STF is therefore the Awarding Body for Designated Route 2 providers of educational and study residential and day visits, where they are organised by third parties on behalf of schools, colleges and youth groups including:

- Study visits
- Foreign exchange visits
- Concert tours
- Sports, skiing and snow sport trips
- Educational conferences
- Cruises
- Pilgrimages

8.9 VISITS ABROAD



All visits abroad fall within category 'C' with regard to approval procedures.

Visits abroad require detailed planning and preparation and most need booking many months in advance to allow sufficient time for all arrangements to be made and for the collection of money.

Leaders should ensure they use the services of a reputable tour operator with experience of group travel.

Air travel organisers may be licensed through ATOL (Air Travel Organisers Licence).

All educational establishments are recommended to use tour companies that are members of a Department of Trade and Industry body such as ABTA (Association of British Travel Agents) or AITO (Association of Independent Tour Operators)

Ensure ready access to insurance company telephone numbers. Insurance is compulsory for visits abroad.

Schools/settings are discouraged from organising their own packages as they may fall within the requirements of Package Tours Regulations 1992. This requires travel organisers to safeguard consumers' money and in the case of insolvency, make arrangements for repatriation.

Adequate medical insurance should be taken out for each party member and an individual EHIC card must be taken on visits to all EU member countries.

The visit leader should take control of all legal documents such as passports, visas and vaccination certificates. **Collective passports** may be used for groups of between 5 and 50 young people under the age of 18, **but note that only UK nationals may be included.**

Behaviour codes need particular attention and guidance is given under the 'Transport and Travel'. Additionally, careful account must be taken of customs, attitudes and expectations within the community to be visited.

Further consideration should be given to issues such as traffic approaching on the 'wrong' side of the road, language difficulties and the leader having access to emergency funds.

It is good practice for all members of the party to carry a card detailing the name, address and telephone number of the accommodation should anyone become separated and passport sized photographs attached to medical forms may assist with identification by local emergency services.

Organisers of visits who are considering the use of minibuses abroad should refer to [Section 7.5.2](#) in this document and if still in doubt consult the Fleet Services group as suggested.

The use of hotel swimming pools should be viewed as a hazard as it is most unlikely that pools abroad have adequate lifeguard cover and school staff should therefore be appropriately qualified. [\(See 8.4.3\)](#)

As part of risk assessments, telephone numbers of consulates, embassies and other key contacts should be to hand.

8.9.1 School Travel Forum (STF)

A number of leading school tour companies have worked together to develop an agreed Code of Practice in the provision of cultural visits abroad. This code has been agreed by the Outdoor Education Advisers Panel (OEAP). Any school/setting wishing to start a programme of visits abroad should look at the opportunities offered by members of STF. By contracting with such a member, there will be no need for schools to ask the provider to complete form LEV 11 as this is the basis of the Code of Practice.

www.schooltravelforum.com. [See Section 8.8.1](#).

8.9.2 The British Standard for overseas expeditions and fieldwork BS8848

BS 8848: a specification for the provision of visits, fieldwork, expeditions, and adventurous activities outside the UK was first published in April 2007. This was later revised and republished to include a self-assessment checklist in January 2009. BS 8848 specifies operational requirements for organisers of adventurous and educational activities abroad including university and academic fieldwork, gap year experiences, adventure holidays, charity challenges and research expeditions. There are already a number of guidelines in place for state funded schools so BS 8848 is initially being targeted at other sectors that organise adventurous activities overseas such as the travel trade, further and higher education, and charities. However, should a school wish to use BS 8848 to supplement existing expertise there is no reason why they shouldn't.

Please refer to: www.bsigroup.com/LocalFiles/en-GB/consumer-guides/resources/BSI-Consumer-Brochure-Adventurous-Activities-UK-EN.pdf

8.9.3 Exchange Visits

Schools/settings must also adhere to the latest statutory guidance from the Department for Education.

A new document was published March 2015 .

Keeping Children Safe in Education: for schools and colleges

Keeping Children Safe in Education: for school and college staff (part 1)

<https://www.gov.uk/government/publications/keeping-children-safe-in-education--2>

Page 28 (Exchange Visits) Children staying with host families

The success of a foreign exchange is heavily dependent on good relationships, planning and communication with the host school. It is important to ensure the following:

- All group members have easy and accessible contact in the host country, preferably by telephone with a member of their own staff;
- The ground rules are made clear between the student, the host family and the party leader;
- Appropriate pairing arrangements are made;
- Host families are aware of any dietary or medical needs;
- There are clear arrangements for collecting and returning students;
- Clear briefings are given to students regarding emergency arrangements and contact with their own staff should be actively encouraged in the case of anxiety or concern.

Party leaders are strongly encouraged to seek assurances from the host school regarding procedures for the vetting of potential host families.

The Outdoor Education Advisers Panel has written a comprehensive document on the subject of exchange visits. A copy of this can be obtained on request by contacting the Education Visits Adviser.

A useful questionnaire is available to support the planning of effective exchange visits (LEV 14). This questionnaire will be required to support any approvals/recommendations by LCC. ([See Section 9](#)).

8.10 RESIDENTIAL VISITS - SECURITY

Site security is an additional major consideration when selecting accommodation for residential visits. A legal judgement has been made stating that an intruder is now a foreseeable hazard (though remote) and thus it is important for schools/settings to take account of security arrangements when undertaking preliminary visits.

At the preliminary visit stage therefore, visit leaders should establish the following:

- That the group should ideally have adjoining rooms on the same floor with staff quarters adjacent, or close to, the young people;
- That access by staff to young people' rooms must be available at all times;
- That the accommodation area should be as discrete to the group as possible;
- That security arrangements are in force to monitor visitors and deter unauthorised entry;
- That locks on windows and shutters are in working order;
- That a floor plan of the rooms assigned to the group is available in advance;
- That arrangements for night-time security are clearly understood by all on the visit.

[See also LEV 11 in Section 9.](#)

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SECTION 9 FORMS

9.1 GENERAL INFORMATION

This section contains the range of forms designed to support schools/settings in ensuring a well managed and easily recorded overview of the tasks involved in the organisation of off-site activities.

It is the intention of this policy and guidance to offer support to schools/settings in their efforts to minimise risk, thus maximising pupil and staff safety. It must be remembered that the existence of paperwork does not necessarily ensure safety, but it shows that adequate thinking and planning has been undertaken to take all reasonable steps to minimise risk. The existence of the paperwork provides the evidence, which in the worst-case scenario, would be needed to show that all such steps had been taken. Consequently, the number of forms may seem lengthy but clearly not all will be needed for every visit, some, depending on the nature of visits undertaken may rarely be used. In reality, the first 4 forms, LEVs 1, 2a, 2b, and 3 (or a school/setting's own version) are the ones that should be considered the minimum requirement for all visits, other than the local, regular visits covered by general consent. Forms can be found at <http://lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service>

All these forms may be either adapted or adopted by Community and Controlled schools. Academy, Foundation, Aided and Independent schools may also choose to make use of them, wholly or in part, to supplement current practice where necessary.

The systematic use of specific forms however will ensure that schools/settings fulfil their obligations regarding consent, approval and risk assessment and the county council will meet its requirement to standardise procedure and monitor compliance with its policy.

LCC Community and Controlled schools/settings should note the following:

Category 'A' visits. All forms completed and retained at school level, none to LA.

Category 'B' visits. LEV 1B, LEV 2a/2b or equivalent risk assessments and itineraries to the Educational Visits Team via evsupport@cfbt.com for notification only for residential visits.

Category 'C' visits. LEV1B, LEV 2a/2b or equivalent risk assessments and itineraries to the Educational Visits Team via evsupport@cfbt.com for approval.

LCC Community and Controlled schools/settings approval procedure – see above for necessary forms. Schools/Settings should note that, the EVC, Head, and Governors should have approved Category C visits **prior** to LA approval being requested.

EVC registration

As explained in [Section 6.1.4](#), all Community and Controlled schools should submit form LEV 5 to register their EVC on the county database, to enable the EVC to approve at school level, all category A and B visits.

Headteachers/Setting Leaders and Chairs of Governors should view the experience of the EVC in the light of visits normally undertaken by the school before supporting the application to be registered.

It is recommended that the EVC has gained sufficient experience and displayed competence in the organising and leading of visits, or has worked with more experienced colleagues on visits before taking on the role themselves.

Any doubts about EVC registration, experience or competence should be discussed with the Education Visits Adviser.

Likewise, if any proposed visit falls well outside the general experience of the EVC, the adviser should be consulted.

Academies, Foundation, Aided and Independent schools are advised to adopt a similar approval system to that shown in this document, though approval for all visits will remain at school level.

A designated governors' sub-committee could fulfil this approval role. EVCs in foundation, aided and independent schools may register with the CfBT Education Services via the Professional Development Agreement if they so wish and the support of the Educational Visits Team will be available if requested.

Any EVC moving school/setting should notify the Education Visits Team in writing, so that the central database can be amended.

9.2 LIST OF FORMS

Lincolnshire County Council Educational Visit Forms (LEVs)

These first four forms should be regarded as the minimum requirement for all visits that require specific parental consent and for which generic or specific risk assessments are not yet in place. Such visits will fall mainly within the 'A' and 'B' categories.

Form	Description	Notes	Interactive Website Links
LEV 1A	Visit Notification/Recommendations for use by Academy, Foundation and Voluntary Aided Schools only	Category A and B Day Visits retained in school/setting. If brought into the service send to evsupport@cfbt.com for Category B Residential (for notification only unless specific advice required) and Category C Visits for advice/recommendations.	lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service
LEV1B	Visit Proposal/Notification/Approval for use by Community, Voluntary Controlled and LA Maintained Schools Only	Category A and B Day Visits retained in school/setting. Send to evsupport@cfbt.com for Category B Residential (for notification only unless specific advice required) and Category C Visits for approval.	
LEV 2a	Risk Assessment Matrix	Alternative templates can be used	
LEV 2b	Risk Assessment Actions		
LEV 3	Parental Consent	See Section 7.8	
LEV 4	Evaluation form (for the school visit log)	Retained by the school/setting. Send to the Educational Visits Team if there has been a significant issue including an accident/near miss	

LEV 5	Application for EVC Registration	Required for all Community, VC schools/settings. Optional for Academies, Foundation and VA schools/settings.	
LEV 6	No longer required		
Useful additional forms for residential visits			
LEV 7	EVC Planning Checklist		lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service
LEV 8	Visit Leader Planning Checklist		
LEV 9	Group Summary Details	Recommended: Adjust to meet specific needs	
LEV 10	Young People Personal Checklist		
Recommended when using such facilities and services			
LEV 11	Educational Use of Commercial, Charitable, and Private Facilities	Optional: Adjust to meet specific needs. LEV 13 can be also be used as an annual check for coach companies.	lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service
LEV 12	Volunteer Driver		
LEV 13	Agreement with PCV Operators		
LEV14	Exchange Visits Checklist (Abroad)	Send to the LA for comment during the planning stage. Submit with Approval LEV1 Form.	
PO3	Report of incident/accident	Use to report near misses and accidents. Use as part of the school/setting's Accident Reporting System.	

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SECTION 10 SUPPORTING INFORMATION

10.1 RISK ASSESSMENTS

Remember that risk assessment is a legal requirement but it is also good practice showing sound forethought and planning.

Risk Assessments should be applied wherever foreseeable risks occur and should be in place for each off-site activity. It is quite acceptable to retain assessments from activities or visits that have happened previously and review them when the same activity re-appears in the programme of visits. The sample assessments included should alert staff of the need to view each visit as an individual set of circumstances however and not assume that every factor will be present to the same degree each time the visit takes place. It is here that the matrix, LEV 2a can play an important role in highlighting the various aspects of the visit.

It is important to use both LEV 2a and 2b together. The matrix in 2a should alert EVCs and Visit Leaders to the likely visit risk level once all the factors have been considered and then appropriate controls listed in 2b.

Please refer to the factors that may influence supervision ratios in [section 7.1](#) as these in turn may have an effect on the controls to be put in place.

10.2 MODEL SCHOOL/SETTING POLICIES

Model School/Setting policies have been introduced to enable each establishment to localise the policy and guidance.

10.3 EDUCATIONAL VISITS LINCOLNSHIRE WEBSITE RESOURCES

The web pages have been developed to provide increased support. These include links to the relevant forms, external document, external organisations, teaching ideas and much more!

<http://lincolnshire.cfbt.com/en-GB/Behaviour-and-Safety/Advisory-Services/Education-Visits-Service>

10.4 A FINAL THOUGHT

Whilst this policy and guidance is intended to cover the broad spectrum of visits undertaken by Lincolnshire schools/settings, it is well worth reflecting on a quotation from the world of mountaineering by Edward Whymper (1840-1911) who led the first successful, but tragic ascent of the Matterhorn in 1865. His words hold much wisdom and relevance for our work today with young people, no matter what environments we choose to take them into.

“Climb if you will, but remember that courage and strength are naught without prudence and that a momentary negligence may destroy the happiness of a lifetime. Do nothing in haste; look well to every step; and from the beginning think what may be the end.”