

# **SCE Policy, Procedures and Guidance for Outdoor Education and School Off-site Visits**

**Adopted November 2005**

## **Notes Regarding Policies, Procedures and Guidance for Outdoor Education and School Off-site Visits**

These policies and procedures must be regarded as a working document. They will be reviewed at least annually in response to developments in outdoor education and government guidance.

It is also likely that the developing needs of schools will lead to on-going additions and amendments.

Richard Simpson  
Outdoor Education Adviser  
November 2005

## **SCE POLICY FOR OUTDOOR EDUCATION AND OFF-SITE VISITS.**

This policy has been developed from the DfES guidance to be consistent with the SCE Mission Statement.

SCE believes that students can derive immense educational benefit by taking part in off-site visits. The knowledge and experience gained beyond the classroom can consolidate and extend the taught curriculum within it. Taking part in problem solving, decision-making and residential experiences both at home and abroad can enhance the development of personal and social skills.

An Off-site Visit is defined as pupils going 'beyond the school gates' to pursue an activity organised by the school. Activities may take place during or after the school day, at weekends or in school holidays and will have an educational basis.

SCE will promote outdoor education and off-site visits in our schools in the confidence that they take place safely and effectively for all by ensuring that:

- all SCE staff are required to follow the Agency framework of procedures and guidance as described in the attached Procedures and Guidance document when organising off-site visits
- all off-site visits have an educational purpose and pre-determined clear educational objectives.
- all participants in activities will be identified as group members associated with the school.
- every student should have full access to each visit that is appropriate to their class, year or option subject, regardless of their abilities, therefore developing further 'the whole child'.
- the Agency's framework will be reviewed at least annually and its implementation will be monitored by Richard Simpson, the Agency's Outdoor Education Adviser
- schools will have a policy on outdoor education and educational visits. This policy may be adopted as it stands or personalised and extended to meet the particular needs of the school.

September 2005

## **SCE Procedures and Guidance for Outdoor Education and School Off-site Visits**

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# **1. PLANNING THE VISIT**

Whatever the type or length of a visit, thorough planning is essential before departure.

## **Planning Considerations**

- The facilities at the venue.
- Equipment the group will need to take with them.
- Staff training needs.
- Transport arrangements.
- Insurance arrangements.
- Supervision ratios (see next section).
- Emergency procedures.
- Arrangements for sending pupils home early.
- Informing parents of arrangements.
- Preparing pupils.

## **Preliminary visits**

A preliminary visit is an important part of planning for any educational visit. In circumstances where such a preliminary visit cannot take place, it is expected that comprehensive information and guidance can be obtained from a local provider.

Wherever possible the staff planning an off-site activity should make a preliminary visit to the venue in order to familiarise themselves and make a proper assessment of its suitability, bearing in mind the age and aptitude of the children, the size of the group, the time of year (including probable weather conditions) and the suitability of the facilities available. Where this is not possible, the leader must obtain information of the places to be visited with particular regard to potential hazards.

During the preliminary visit, Group Leaders should keep full, written notes. The visit will help Group leaders to gain an insight into the site or centre and it should include an evaluation of the following:

## **Supervision**

Supervision needs should be considered during the planning stage.

Adult : pupil ratios are difficult to prescribe as needs differ according to the type of visit or the planned activity. The factors that must be taken into account are:

- Sex, age, ability and competence of the group.
- Pupils with medical needs or SEN.
- The type of activity and the hazards associated with it.
- The length and type of journey.
- Type of accommodation to be used.
- The competence of staff both generally and in specific activities.
- The requirements of the venue to be visited.
- The competence of the pupils and their standards of behaviour.
- Provision for first aid.

## **Ratios.**

Staffing ratios for visits are difficult to prescribe, as they will vary according to the activity, age, group, location and the efficient use of resources. The DfES guidance suggests that for visits to local historical sites and museums and local walks, the ratio in normal circumstances would be:

- 1 adult for every 6 pupils (years 1 – 3), Foundation Stage 1 settings must have a higher ratio;
- 1 adult for every 10-15 pupils (years 4 –6);
- 1 adult for every 15 – 20 pupils (year 7+).
- Minimum 1:10 for visits to countries other than that of residence.

***There must always be a minimum of two adults***

An activity must have sufficient accompanying adults in order to provide the appropriate minimum ratio. There will always be at least two adults (one of whom must be a teacher or teaching assistant) with the group.

These are the basic requirements, and should not automatically be taken as providing appropriate supervision; they should be amended to suit the actual visit and the associated hazards.

***Never allow anyone who has not been CRB checked to have unsupervised access to children.***

It would however be impossible to CRB check host families when a school organises pupils on a foreign exchange visit. The group leader must have good relations with the host school and rely on their judgement to assess suitable families. Parents must be informed that the host families have not been CRB checked before they consent to their child taking part.

## **Duty of care**

### *1. In Loco Parentis*

Justice Cain in 1898

*“The schoolmaster is bound to take such care of his boys as a careful father would take care of his boys”*

### **2. Duty of Care**

All who have a responsibility for looking after others have a duty of care in common law.

*In loco parentis* means that the level of duty of care required by a teacher is that of a reasonable, prudent and careful parent and this is the standard of care set by the courts and judged as the proper level of competence associated with the proper discharge of our professional duties.

**This overarching legal responsibility remains with the teacher and cannot be delegated to coaches, instructors or volunteers acting on behalf of the teacher or the school.**

The pastoral duty of care remains with the teacher, although the technical duty of care may be delegated to, for example, a ski instructor.

All teachers must operate this duty when they have children in their care. This applies to all activities within the school curriculum, to extra-curricular activities during or outside of school hours, whether on or away from the school premises. The duty of care is 24 hour a day, seven days a week obligation. It cannot be diluted by any association with words such as ‘holiday’, ‘abroad’ or ‘weekend’.

Over the years it has been established through the courts that a school teacher should be expected to know a good deal more about the propensities of children than a prudent parent. A higher duty of care is the standard of care expected with increased experience, training and specialist expertise.

## **The Members of the Party**

The Group Leader must ensure that members of the party have reasonable preliminary, theoretical and practical preparations that should be at a level appropriate to the age of the group and the nature of the activities. This should include consideration of potential emergencies and associated actions to be taken.

## **Competence**

All activities must be supervised by people of suitable competence. For some activities the teacher may be required to hold a leader or instructor qualification of the national governing body for that activity.

However, paper qualifications will need to be supplemented by the verification of other qualities i.e. maturity, general supervision skills, ability to supervise different types of group, relevant experience etc.

Competence as a leader will result from:

- experience/knowledge of the environment/venue to be visited;
- experience of the activities to be undertaken;
- leading similar educational visits;
- knowledge of the pupils involved;
- appropriate training;
- leadership skills and other personal qualities.

The EVC and head teacher needs to be satisfied that the group leader and other accompanying teachers are sufficiently competent to carry out their responsibilities and are suitable for the role.

The following can be considered evidence of competence:

- National Governing Body Awards/qualifications.
- National Vocational Qualifications.
- OCR Off-site Safety Management Certificate.
- Local or in house validation.
- Site-specific assessment.
- Experience confirmed by assessment in the field.

#### **Adults accompanied by own children on an educational visit**

- **If any adult accompanying the visit has a child or children in the party of pupils or young people, then one other adult must be added to the relevant minimum ratio. (For the situation where an adult brings a child who would not ordinarily be one of the party, see below)**

#### **Own Children (not being part of the class or group)**

It is known that, in some cases, arrangements are made for a member of staff or a volunteer to take with them a child or children who would not otherwise be one of the group taking part in the visit or activity. This situation would usually arise where an adult brings along his or her own child (ren), and possibly a friend. In these circumstances a conflict of interests could occur in an emergency situation, or a parent may be so emotionally involved that they are less effective as a group leader in an emergency. Schools, are encouraged to arrange their visits and activities in such a way that this does not happen. It must be clearly understood that, if an adult does bring along another child or children in this way, there are certain consequences, which must be acknowledged. The most significant of these are:

- The adult must be wholly discounted for the purpose of calculating any adult / pupil ratio.
  - It is possible that the MoD insurance arrangements will not provide cover of any sort in respect of those children. Accordingly it is the responsibility of the adult concerned to arrange whatever insurance cover they consider appropriate.
  - SCE takes the view that responsibility for the health, safety and welfare of such child (ren) lies entirely with the adult who has brought the child (ren), and not with the other staff / volunteers, or with SCE.

<b>Will any of the supervising adults be accompanied by their own child?</b>
------------------------------------------------------------------------------

**NO**

The ratio of adults: children must be maintained in line with SCE Policy (ratios).

**YES**

Is that child one of the class or group undertaking the visit?

**YES**

One additional adult, who does not have a child on the visit, must be added to the total number required in line with the SCE Policy (see minimum ratios below).

**Note:** Only one additional adult is required even if more than one adult is accompanied by their child on the visit.

**NO**

The supervising adult who wishes their child to accompany the party cannot be counted when calculating the required adults:children ratio.

### **First Aid**

The level of first aid provision required must be risk assessed. This means that the Group Leader must ensure that adequate first aid arrangements are made, bearing in mind the location and nature of the activity. In a situation where expert medical help is not readily available at least one member of staff should be a competent first aider. An adequate level of first aid is determined by the nature and venue of the visit. For example for a sporting fixture to another school where there is a medical centre close by would require a lesser level of first aid provision than an adventurous activity or in a remote location. On any kind of visit the group leader should have a good working knowledge of first aid and ensure that an adequate first aid box is taken. For adventurous activities or residential visits it is sensible for at least one of the group's teachers to be a trained first aider. A two-day 16 hour first aid course that covers first aid in the outdoors is a suitable level of qualification. All adults in the group should know how to contact the emergency services.

Standard contents for a 10 person First Aid Box is;

- A leaflet giving general advice on First Aid.
- Twenty individually wrapped sterile adhesive dressings in assorted sizes.
- Two sterile eye pads with attachments.
- Four individually wrapped triangular bandages.
- Six Safety pins.
- Six medium sized (12cm x 12cm approximately) individually wrapped sterile unmedicated wound dressings.
- Two large versions of item 6 (18 cm x 18 cm approximately).
- Saline water or sterile normal saline solution (when no mains water is at hand) Normasol is a brand of saline solution that is acceptable to use.
- Disposable face shield (un-used) can be included (Protection from HIV etc).
- Plastic bags and ties for disposal of soiled items
- Scissors (must be blunt ended)
- Hypo-allergenic waterproof elastoplast-type dressings
- Hypo-allergenic moist cleansing wipes
- 2 pairs gloves, vinyl or latex (caution - ensure First Aider is not susceptible to latex induced dermatitis)

### **Medicines and Medication**

In general medicines should be clearly labelled with name and dosage and handed to the Group Leader, as it is clearly not desirable for young children to be responsible for them. For certain conditions however, this procedure may be wholly inappropriate and potentially harmful, i.e. asthma where it would be wrong to separate an asthma sufferer from a prescribed inhaler. Similar consideration and care might need to be exercised for the sufferer of diabetes. In such circumstances, it would be advisable to consult with the young person's parents/carer and, if necessary, seek medical advice.

When medication is to be administered to a pupil the following good practice should be followed

- A letter of authority from the parent should be received in order to confirm their consent and details of the dose required.
- Only the minimum necessary supply of medicine for the visit should be taken.
- The Health Care Plan for children on medication should be carried on the visit.
- If necessary further advice about the medication can, with the agreement of the parent, be obtained from the child's medical centre.

Non-prescribed over the counter medicines such as paracetamol should not be administered without written parental consent.

## **Transport**

For all educational visits transport requests are made on Form F/MT 1000 to the local GTO who will arrange your transport. All transport discussion will then take place directly between you and the GTO.

HQ SCE does not need to approve transport requests.

Please provide clear details on the F/MT 100 in order to enable the GTO to make a decision about transport, this includes which budget line he allocates the journey to and so precise details are important. Continue on a further sheet if necessary

Please avoid asking for transport that requires a driver to stay overnight if you possibly can. If you do need the coach and driver for the full period of the visit, this may well be possible, but you will be asked to justify that request. Please add these details to the F/MT 1000

## **Transport Request Form, Guidance Notes for completion of F/MT 1000,**

### **Part 1**

There is no need to write a UIN in here – unless you want the school to be charged for the journey.

### **Part 2**

Journey details. In here you must give as much detail as possible. In particular, if you want the driver to stay overnight, then say why here.

It may be that it would help for a driver to return with a coach for transport on particular days. If this is the case, say why and which days here

Terminology. All of our journeys are **educational visits**. If they are not, then it is difficult to justify provision of transport from the army. They are certainly **not** holidays!

If necessary attach additional notes to the form.

### **Parts 3 and 4**

Do not write anything in here especially not in part 4, unless you want to risk costs being charged to your school.

For skiing activities transport is provided from the Youth Service budget. Your Garrison Youth & Community Officer must therefore countersign The F/MT 1000 before it reaches the GTO.

## **Supervision of pupils on the journey and at the visit destination**

Accompanying staff must accept responsibility for the good behaviour of their groups both on the journey and during the visit.

It will greatly ease supervision if each accompanying adult takes responsibility for a sub-group, with the group leader or deputy being personally responsible for any young people who might create difficulties. Each sub-group leader will naturally have a list of the young people in his/her group, while the group leader has a complete list, augmented by a card for each person giving personal details and a passport sized photograph. If a member of the party should go missing the local police would then have some concrete details to work from. Impress on everyone that if lost they should go for help to a public building (shop/museum) or find a person in uniform and not approach passers-by in the street.

It is often useful to give each pupil a card with details of their hotel and teacher contact numbers in the local language. This can be helpful to them if lost.

## **Insurance for educational visits**

When considering the need for insurance for educational visits the following guidance will help in identifying the precise need.

- **Personal Liability** - ALL personnel posted overseas are actively “encouraged” to take out Personal Liability Insurance. This is no different a scenario to that of a child being hurt or hurting someone else outside their SFA/house, whilst not taking part in any official activity. This would of course mean that, for example, if the trip involved

eating in a restaurant on an evening and a pupil/student was injured by or caused injury to a third party the MoD would not act on their behalf.

In all cases it is important to confirm that parents have followed MoD guidance and have provided third party liability insurance for their children

For insurance purposes, educational visits and outdoor education will fall into seven discrete categories.

1. Curriculum-Based Day visits - Within the country of residence and in the UK and not involving any form of hazardous activity. Provided SCE procedures and guidance are followed, there is no requirement for additional insurance and ACO (NWE) will accept Crown liability.
2. Curriculum-Based Day Visits - Outwith the country of residence or the UK, and not involving any form of hazardous activity. Provided SCE procedures and guidance are followed and pupils and staff are in possession of a European Health Insurance Card (the successor to E111), there is no requirement for additional insurance and ACO (NWE) will accept Crown liability.
3. Curriculum-Based Day Visits – Either Within or Outwith the country of residence or the UK and involving some form of hazardous activity (Outdoor Education Adviser to decide on definition but to include rock climbing and abseiling, watersports, snowsports and walking or trekking in a remote location; more than 30 minutes from a road). Again these activities must take place in accordance with SCE procedures and guidance. Staff and pupils to obtain suitable Medical Insurance, ACO (NWE) is unlikely to accept Crown liability.
4. Curriculum-Based Residential Visits - Within the country of residence or the UK and not involving any form of hazardous activity. Provided SCE procedures and guidance are followed there is no requirement for additional insurance and ACO (NWE) will accept Crown liability.
5. Curriculum-Based Residential Visits - Outwith the country of residence or the UK, but within the European Economic Area and not involving any form of hazardous activity - Provided SCE procedures and guidance are followed and pupils and staff are in possession of a European Health Insurance Card (The successor to E111), there is no requirement for additional insurance and ACO (NWE) will accept Crown liability.
6. Curriculum-Based Residential Visits - Outwith the country of residence or the UK and the European Economic Area and not involving any form of hazardous activity. Again these activities must take place in accordance with SCE procedures and guidance. Staff and pupils to obtain suitable Medical Insurance, ACO (NWE) is unlikely to accept Crown liability.
7. Curriculum-Based Residential Visits - Either Within or Outwith the country of residence or the UK and involving any form of hazardous activity (Outdoor Education Adviser to decide on definition but to include rock climbing and abseiling, watersports, snowsports and walking or trekking in a remote location; more than 30 minutes from a road). Again these activities must take place in accordance with SCE procedures and guidance. Staff and pupils to obtain suitable Medical Insurance and ACO (NWE) is unlikely to accept Crown liability.

Where any uncertainty exists the Outdoor Education Adviser will determine whether or not a visit can be judged as being a “Curriculum-Based” visit.

Notwithstanding the above, the following points must be noted.

1. ACO (NWE) will not accept liability for loss or damage to personnel effects and staff and pupils (parents) should be encouraged to obtain suitable insurance. This is often incorporated in household policies, if this is not the case then a suitable travel policy should be considered.

2. **Medical** – as outlined above, staff and pupils will be covered for “non-hazardous” activity. This will **exclude**, for example, things like **Extra Medical Expenses** that might arise in order to accommodate parents or to transport them to hospital in the case of an accident. This is in line with provision for Service or UKBC personnel.
3. **Personal Accident(s)** – Again the Medical treatment will be met in line with the broad categorisations above. This will **exclude** personal injury compensation. This is in line with provision for Service or UKBC personnel.

School visit organisers must consider the above and then determine whether or not additional insurance should be purchased. In all cases it is good practice to ensure that parents are fully informed as to what the MoD will or will not cover. For some of the above it is reasonable for insurance responsibilities to lie with the parents, but they must know that this is the case.

### **Mobile Phones and Pagers**

It is up to the group leader to ensure that there are enough mobile phones/pagers within the group, and delegate responsibility for maintenance of batteries. Do not rely on a mobile phone for emergency situations as the signal may be out of range.

The situation regarding mobile phones belonging to students should be considered and a policy formulated.

### **Risk Assessment**

Implicit to any planning is risk assessment, consideration must be given to the dangers and difficulties that may arise, and control measures must be put into place to reduce them.

The risk assessment must take into account

- The type of visit / activity and the level at which it is being undertaken.
- The location, route and method of transport.
- The competence, experience and qualifications of supervisory staff.
- The ratio of teachers and supervisory staff to pupils.
- The pupils ages, competence and fitness and the suitability of the activity.
- Pupils with SEN or medical needs.
- Quality and suitability of equipment.
- Seasonal conditions and timings.
- Emergency procedures.
- Risks should be monitored throughout the duration of the visit and risk assessments amended as necessary

The Group Leader should, if possible/appropriate make a preliminary visit in order to familiarise themselves with the venue and assess hazards. See page 7 for further details.

Risk Assessments will be prepared for all aspects of a school trip that the school is actually organising (i.e. transport to and from venue, leisure activities at a centre etc.). Activities undertaken under the supervision of instructors when visiting organised centres will be the responsibility of the centre. It is the responsibility of the Group Leader to check that the risk assessments are in place. School risk assessments should be reviewed after each visit to ensure that any issues or concerns are dealt with and recorded whilst fresh in staff's minds. Risk assessments are a working document and should be amended during a visit in the light of daily experiences. They should also be reviewed and altered or amended well in advance of the next similar trip to ensure that changes in supervising staff and pupils are considered. All supervising adults going on the trip should be made aware of, and understand, the control measures introduced as a result of the risk assessment. They should be asked to signify their understanding and acceptance of the control measures required. School risk assessments should be attached to **Form A** and sent to the Outdoor Education Adviser.

The Outdoor Education Adviser holds generic risk assessments for some activities that are available to aid schools in their work

## **Emergency Procedures**

The group leader must make all adults accompanying a group aware of the emergency procedures that will apply. Each adult should be provided with an emergency telephone number. The Headteacher / EVC must ensure that group leaders have telephone numbers for a 24-hour standby person based contact. The emergency contacts must be available 24/7. Groups must not be in the position of having to speak to leave a message on an answer phone. During the school day the emergency contact number may well be the school number but must not be the answer phone.

A hierarchy of contacts as shown on **Form E** is most desirable.

**The following should be held at all times by the group leader, the 24 hour contact person and the school office.**

- A list the names and parental emergency contact numbers of all participating children and an emergency contact number for accompanying adults.
- A programme/itinerary for the visit.
- Details of travel arrangements, including return time.
- Contact number for the residential accommodation.
- A completed copy of **Form E** showing the hierarchy of contacts

Parents should be given the number of the school office and a number for the 24 hour contact person in case they need to contact the group in an emergency. Should parents need to contact the group in an emergency it is usually better if they do not do this directly, since the group leader is likely to be busy with the group and not in a position to make an immediate plan for a course of action. It is quite likely that some discussion with the contact person would be helpful.

The safety of the group, and especially the children, is of paramount importance. During the activity the group leader must take whatever steps are necessary to ensure their safety, even if this means a last minute cancellation or change of activity.

Prior to an activity, if it is felt that the behaviour of an individual child is likely to compromise the safety of others or the good name of the school, the group leader should discuss with the Headteacher/EVC the possibility of excluding the child from the activity.

## **Parental Consent**

The parents of children taking part in an off-site activity must be provided with full and concise information about the activity their child is to be undertaking. Parental consent must be **informed consent**; parents should never be in a position where they do not know what it is that their children will be doing. Where the activity is taking place entirely within a normal school day it is sufficient to obtain an acknowledgement that the parents are aware of the arrangements and what the visit will involve. Where the activity extends beyond the normal school day written permission from the parent must be obtained.

## **Costings**

Prior to organising an off-site activity staff should ensure that the total cost of the activity is determined. This will include costs associated with the visit which would normally fall on the school e.g. transport, entrance fees, insurance, provision of any resources or equipment specific to the activity and costs relating to adult helpers.

Funding for off-site activities is provided mainly by parental contributions (voluntary except in the case of residential visits).

The timetable for the payment of contributions should allow for the Headteacher to make a decision about the financial viability of the activity in reasonable time.

No child may be excluded from an activity because of the unwillingness or inability of the parent to make a contribution.

## **2. RESIDENTIAL VISITS**

Residential visits should only take place in centres that meet that country's fire safety regulations

The type of visit will depend on its purpose, the time of year, the distance to be travelled, the price and the nature of the group. It is possible to buy a package of accommodation and activities or these can be arranged separately. Whichever is chosen the site residential arrangements and the instructors should be suitable for the needs of the group.

If possible, visit the centre when another group is in residence so that the activities can be seen and other group leaders consulted.

Ask for written references from previous groups, or, even better, ask for the names and address of the last five schools who have visited.

Remember that whilst safety is obviously paramount, it is also necessary to consider the quality of the programme offered in terms of educational content and participant involvement.

Collect promotional material and take photographs that can later be used to inform all staff or be displayed at a parents' meeting.

Finally, on return, confirm any verbal arrangements in writing and inform your Head teacher/EVC how the preliminary visit went and what impressions and knowledge you have gained.

### **Accommodation**

Check that the sleeping areas are adequate for the needs of the group. This will obviously vary depending on the accommodation chosen but it should offer,

- adequate ventilation;
- reasonable washing and toilet facilities;
- heating and lighting
- enough storage space for personal belongings;
- Sufficient room between bunks or beds to allow easy movement (particularly in the event of an emergency).

Permanent centres should also provide a separate area for sick/unwell visitors and sleeping areas should be clean and tidy.

Check facilities for washing/drying clothes and storing outdoor equipment. Find out about meeting rooms, work bases and evening recreational/relaxation areas.

Ensure that kitchen and dining facilities are sufficient for the numbers involved and particularly if your group is self-catering, that there are sufficient facilities for safety, health and hygiene.

### **Prior to the Visit**

All of the considerations for a day visit will apply, as well as the specific points that follow:

- The roles, duties and expectations of accompanying staff and helpers should be clearly defined and understood so that everyone is involved and clear about what they are expected of them. This should be done through formal meetings rather than on an ad hoc basis. This is particularly true for inexperienced staff and adult helpers who may not appreciate that a residential visit requires a great deal of commitment and goodwill if they are to be successful.
- Parents need to be fully informed of the type of visit proposed. This is best done through an initial letter followed by a parents' meeting at which they should be informed of the following.
  - Reason and purpose of the visit;
  - Nature of the programme (this must include details of all activities);
  - Nature of the supervision arrangements;

- Expectations of behaviour (Code of Conduct)
- Method of travel, including names of coach companies, airlines, etc, as appropriate;
- Insurance arrangements;
- Cost and methods of payment;
- Pocket money and any arrangements for giving it out;
- Address and telephone number of venue;
- Type of accommodation, i.e. bunks, shared facilities, etc;
- Clothing requirements via a kit list (stress that clothing and other possessions should be clearly marked);
- Emergency contact telephone number;
- Procedures for storage and administration of medication
- Banned items i.e. jewellery, mobile phones etc
- The use of cameras/video cameras
- Sun protection requirements

This information should be confirmed in writing and parents/guardians should then be asked to complete and sign:

- A consent form (**Form C**);
- A medical information form (**Form C**).

In addition to the information above, participants will need to know about:

- the implications of communal living in terms of tolerance, chores, conduct towards others, etc;
- the purpose and aims of the visit;
- the nature of any specific work to be undertaken;
- work/training which is necessary before going;
- how spare time might be used;
- Expectations of conduct.

### **On Arrival at the Residential Centre**

When arriving at a staffed residential centre, the group leader should meet the centre manager or someone of similar status and agree on any routines and regulations that have not been previously given. **The Group leader should ensure that any requests or stipulations agreed in writing prior to the journey (i.e. leaders' qualifications, fire regulations, first aid arrangements, etc.) still apply.**

- Define limits early - remember the group is new to the site - explain boundaries/limitations - say what you want but do so only after consultation. With the Centre Manager, and leaders of other parties if appropriate.
- Explain duty rotas and procedures in relationship to the site.

### **Fire Evacuation**

The following points need to be noted:

- Check that all exit routes from dormitories and other sleeping accommodation is clearly indicated.
- The posted instructions are clear and have been read to new visitors and are understood
- A fire drill is held during the first day for new visitors.
- The arrangements for calling the fire brigade are adequate and understood and that someone has the duty to make such a call on hearing the alarm where there is no member of the permanent staff on-site who already holds this duty.
- This person knows the location of the nearest telephones and the full address of the building/camp to enable prompt response by the fire brigade.
- All occupants are familiar with emergency procedures and escape routes.

## **Detailed Organisation/Administration**

### **Supervisory Ratio - Accompanying Adults**

Careful consideration should be given to this point and the activities to be carried out should be properly evaluated, to ensure that there are sufficient staff available for supervision at all times. To implement this, a ratio of staff to young people of at least 1:10 will be needed for residential visits. The majority of commercial school tour operators now offer an automatic supervisory place ratio of one adult to ten paying young people. These supervisory places should only be available for members of staff or designated supervisory adults.

At least two members of staff must accompany any residential visit, one of them clearly designated as group leader. A mixed group must be accompanied by male and female adults except where pupils are less than 11 years of age (i.e. year 6 and below) in which case they may be accompanied by two female staff. The group leader should be an experienced teacher and should be satisfied that there is sufficient experience and expertise in the staff team accompanying him/her.

Adults other than members of staff (i.e. husband/wife or teacher/youth worker, parent, student, foreign language assistant) may usefully accompany the group but the ultimate responsibility for the young people's welfare and safety lies with the teachers involved and in particular with the Group Leader. Adults may only accompany the party as supervisors if they have no other commitment throughout the whole of the visit. Wherever possible, a second teacher should be designated as a deputy leader, be fully associated with the planning and organisation of the visit and be prepared to take responsibility for the group in case of emergency

All adults should have been clearly briefed by the Group Leader so that roles, duties and responsibilities are understood and accepted. All adults should be aware of their own role and duties, both to ensure that they feel involved and to give adequate supervision.

### **Group Composition/Parental Involvement**

Information by letter to parents about the proposed educational visit should, in the case of visits lasting more than two days, be complemented by a parents' meeting at which issues can be clarified, questions answered, etc. Many schools prepare a booklet for parents, with detailed information about plans, requirements, etc.

Ground rules for the visit should be clearly established at an early stage. Parental consent forms (**Form C**) should be completed and relevant medical/diet details should be obtained in good time before the journey begins. The Group leader must compile a full list of names, addresses and contact telephone numbers of parents/carers in case of emergency. A copy of this list should be left with the home-based contact. Ensure that the group leader has the details of the home-based contact person with them at all times.

### **Financial Arrangements**

Steps should be taken at an early stage to secure an initial deposit from party members and to allow for regular payment by instalments by agreed dates. Receipts and payments must be fully documented and the account details must be available for scrutiny by the Headteacher at all times. A teacher should never - even temporarily - pay such money into his/her own account. When initially estimating the overall cost of a journey, it is best to include all expenses (including i.e. pocket money) and to give a realistic global figure to parents. A refund in the case of an over-estimate is always more acceptable than a supplementary charge.

### **Staff/Instructors for Activities**

Check that there are written operating procedures for each activity and ask for written evidence of the qualifications and experience of the staff leading activities. Many centres use their own in-house training and this can vary from the very good to the unacceptable. Find out what you can about the trainers. Wherever possible, insist on recognised National Governing Body Awards.

**Special Risks on or near the site.**

Find out about hazardous areas, i.e. chemicals, storage pits or tanks, dangerous animals, water areas, drops/heights, etc.

**Supervision**

Group leaders and visiting staff remain responsible for the well-being of their party members at all times, although clearly the centre has a duty here, particularly during activity sessions. Discuss and confirm with the centre staff the level and type of supervision that they will undertake.

**Transport and Equipment**

If centre transport is to be used it must be in a roadworthy condition. If in doubt, press the centre manager for details on maintenance.

All equipment used should be adequate for its purpose. Most outdoor equipment such as helmets, buoyancy aids etc have recognised standards such as BSI, BMIF, CEN or UIAA. Again, if the equipment, even to an untrained eye, appears neglected or deficient, press the centre manager.

### **3. ADVENTUROUS ACTIVITIES**

In the UK providers of adventurous activities must be licensed by the Adventurous Activities Licensing Authority (AALA). AALA is our guarantee that certain minimum standards are met by commercial providers of adventurous activities. If adventurous activities are to be undertaken in the UK then the Group Leader must ensure that the provider is licensed for those activities

Where schools use providers of adventurous activities outside of the UK then particular attention must be taken in order to ensure that the quality of the provision is as we would want it to be. In order to achieve this it is important to at least check the qualifications of the instructional staff. It is also useful to ask the opinion of the Outdoor Education Adviser at an early stage of the planning, rather than to wait until an approval request is submitted on Form A.

#### **Use of military providers**

Military instructors who are teaching children should be civilian qualified in addition to any military qualifications that they might hold.

If in any doubt about the suitability of an external provider, including those from the military, seek advice from the Outdoor Education Adviser.

## **4. VISITS TO COUNTRIES OTHER THAN THAT OF RESIDENCE**

The locations of many SCE schools mean that it is easy and often desirable to organise visits to other countries than that of residence. Such visits may be approved at school level by the EVC or the Headteacher where the visit is a Category A visit. (See under Approval for Educational Visits)

Where an overnight stay is to take place then the Outdoor Education Adviser must approve the visit.

**It is critical that the Group Leader knows the status of everybody on the visit. Anybody who is not a British national, or the national of an EU country, will not enjoy reciprocal health care rights when out of Germany. This applies to foreign and commonwealth nationals who are presently in our schools. It will usually be necessary for such pupils to have private health care insurance.**

When the visit is to another country then the matter of pupil passports and E111s must be considered.

Recent advice (23/09/05) from the British consulate office is given below.

*Holland, Denmark, France, Germany and Belgium are all part of the Schengen Agreement so there are in theory no passport controls between the borders of any of them. Ergo no need to carry a passport.*

*However,..... here in the real world, as the passport is the only national ID document issued by the British Government and a person is actually required to carry ID in those countries I always recommend people to take their passports. The BFG card is certainly valid in Germany but I cannot guarantee that it would be in other countries. It is really up to their authorities. A passport, however, is an internationally recognised ID and travel document.*

*In summary, I would recommend that your children have passports if they leave Germany on school trips in the extremely unlikely event that they must identify themselves or that they become involved in an emergency situation.*

What this means for us is that for longer visits to other countries it is important that passports and E111s are carried for all pupils. For shorter visits, for example to go swimming each week or to a museum or park then the need for these documents should be risk assessed by the group leader. If an incident might arise where it cannot be dealt with by returning to the country of residence, then it would be wise to hold passports. Otherwise a fair judgement might be that they are not necessary. In the case of a child being hospitalised in another country where the parents could call at the hospital, and bring the E111 with them then that may be a fair way of dealing with the risk rather than carry E111s every time pupils are taken out of the country of residence.

**NB** It is advisable to take photocopies of Form E111 (together with the originals) when travelling to another EU country. The group leader should always retain the original and a copy given to authorities abroad (i.e. local sickness insurance office) if necessary

### **Vaccinations**

It is always advisable to obtain medical advice from a BFG medical centre well in advance of travelling.

### **Foreign Office Travel Advice**

The Foreign and Commonwealth Office (FCO) produce regularly updated travel advice bulletins on possible security risks in travelling to or within a particular country. The advice usually gives a summary of the current political situation, health warnings and will send out warnings if they feel the situation within a country is unsafe. As security issues are subject to

change it is advisable to check travel advice every time travel is planned. Web site address: [www.fco.gov.uk](http://www.fco.gov.uk) Tel. 020 72703000.

Before travelling abroad please ensure that the telephone number for the British Embassy in the country to be visited is obtained and carried by the group leader and deputy in case of an emergency.

## **5. SCHOOL EXCHANGE VISITS**

The success of an exchange visit largely depends on good relationships and communication with the partner school.

Individual school exchange visits differ from other visits abroad in that pupils will spend the majority of their time with host families and are, therefore, not always under the direct supervision of school staff. It should be noted that host families would not be subject to English Law.

Pupils must be made aware of any ground /basic rules agreed between the group leader and the host family, many of the considerations that apply to residential and day trips also apply. In addition the group leader must ensure:

4. a good personal knowledge of the host school and counterpart;
5. satisfactory 'pairing' arrangements must be in place. The partner school must make the host families aware of any special medical or dietary needs of their guests, their gender and age, family contact information etc;
6. parents, pupils and the host school must be clear about the arrangements for collecting and distributing pupils to families, and for transporting pupils throughout their visit;
7. the head teacher must retain a list of all the children involved and their home and host names and addresses;
8. pupils living with host families must have easy access to their teachers, usually by telephone;
9. parents must be made aware that children living with host families will not always be under direct teacher supervision.

### **Vetting Host Families**

Exchange or home stay visits can be arranged through agencies in which case the Headteacher must satisfy him/herself that the host families have been suitably vetted. Group leaders making their own arrangements must be clear about procedures in the relevant country for vetting the suitability of host families, including criminal background checks insofar as these are available.

If the host school or the agency does not have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange or home stay pupils, the group leader should seek further assurances and reconsider whether the visits should take place.

In all cases the group leader remains responsible for ensuring the safety and well being of being all members of their group.

### **Written Consent**

Written consent from parents or guardians must be obtained in respect of all pupils taking part in exchange visits from both the guest and host families. Consent forms must also ask for permission not only for particular activities, but also where the pupils may be travelling, be unsupervised and for activities outside of normal school hours. Parents must be fully informed about what the visit entails and what activities they are giving consent to.

### **Safety of Children**

When pupils are to be involved in twinning activities there must be an agreed policy, advice may be sought from the appropriate bodies i.e. social services child protection unit, police, school advisory committees, the Outdoor Education Adviser etc. However, there are also some general steps that should be followed:

- Ensure that pupils are fully prepared by discussing, and providing information on practical issues, language and culture before a visit.
- Agree an acceptable code of behaviour with the pupils, their parents/guardians and those leading the exchange visits. Communicate effectively with the counterpart organisers to ensure that they are clear about the requirements of the pupils, and that

you are fully briefed about the programme, accommodation etc. for the duration of the whole visit.

- Ensure that procedures are in place to check the well being of the pupils at the beginning of the visit, and at separate intervals throughout the stay.
- Ensure that all pupils are given contact details of the designated co-ordinators of the visit and information on what to do in the event of a problem or mishap.

## **6. DURING THE VISIT**

### **Head Counts**

Whatever the nature or length of a visit there should always be regular head counts, particularly before leaving any venue.

A supervisor must carry a list of all pupils and adults on the visit, at all times. The DfES suggests, that particularly with pupils in years 1 – 3, pupils should be easily identifiable, especially in densely populated areas i.e. bright baseball caps, T-shirts, uniform etc. Pupils should NEVER wear name badges as this makes them vulnerable to strangers pretending to know them. Badges displaying the school name and its emergency contact number can be useful.

### **Recording Accidents**

Accidents are 'unplanned events' and, therefore, not every eventuality can be accounted for in the risk assessment. Should an accident occur it must be, if applicable, recorded in the accident book at the venue. Upon return to school the accident should also be recorded in the school accident book, and if appropriate a P25 accident form should be completed and sent/faxed to the Health and Safety Officer. A copy should be kept for school records. If the accident resulted in a major injury i.e. fracture, concussion, hospital treatment etc. it is advisable to obtain witness statements. The reason for this is that children have until their 21<sup>st</sup> birthday to make a claim for compensation and so it may be many years until the claim transpires, by which time many members of staff who witnessed the event may have left or moved on, making it very difficult to compile the necessary information.

### **On going (or dynamic) risk assessment**

Be ready to annotate and update the risk assessment throughout the visit. Risk assessment is an ongoing process; it should not be regarded as a one off exercise prior to the visit. Be prepared to amend your planned course of action in the event of changing or unforeseen circumstances.

## **7. AFTER THE VISIT**

A report on the visit should be made to the Headteacher/EVC. The party should be debriefed and any follow-up completed. Any appropriate letters of thanks should be sent and all accounts checked, finalised and closed. Alterations/amendments to the risk assessments can be made at this stage if the trip is to be repeated at a later date. See form **Evaluation of the Visit by the Group Leader for Future Reference**.

Review and evaluation of the visit and of the risk assessments is important in order to note any lessons learned and to inform future good practice. The planning of any particular visit should start from the evaluation of the previous visit.

## **8. BASIC PRINCIPLES FOR SAFE PRACTICE FOR SCHOOL VISITS**

All school visits carry elements of danger or risk, whilst adopting principles of risk management will not necessarily prevent accidents or incidents, they will assist in ensuring the likelihood is reduced to acceptable levels.

1. Carry out a risk assessment that considers the health, safety and welfare of all adults/pupils participating in the activity.
2. Ensure that there is a clearly identified purpose for the whole visit, appropriate to the age and ability of the group.
3. The qualities of leadership, judgement, anticipation and control are essential on the part of staff and assistants, particularly the group leader.
4. Ensure that you comply with any statutory regulations.
5. Work within the guidance and standards of competence recommended by national governing bodies and other recognised organisations.
6. Ensure that appropriate personnel, group equipment and clothing are available, where appropriate.
7. If uncertain about 'safe practice' seek professional advice.
8. Take a responsible attitude toward the environment.
9. Good discipline throughout the whole of the visit is essential. A code of conduct in relation to smoking, alcohol and behaviour between sexes needs to be clearly established and understood.
10. Keep parents and pupils informed about proposed visits, gain approval from the Outdoor Education Adviser where appropriate.
11. Adequate supervision must be maintained at all times. This may close or remote supervision.
12. Carry a list of the contact numbers for each person on the visit, and the emergency contact information for the school.
13. Know your group.
14. Carry out a pre-visit to the venue, assess the risks and put control measures in place.
15. Assess the conditions of the day, change the day's activity if necessary, and do not take unnecessary risks.
16. Have a "Plan B" in place. You will then not feel 'forced' to follow a earlier plan of activities should conditions become unsuitable
17. Record and learn from accidents, incidents and near misses.
18. Review the risk assessment on returning to school.

## **9. SUMMARY OF PROCEDURES FOR ORGANISING AN EDUCATIONAL VISIT**

The following procedures should be followed for all school visits:

- Informed written consent must be obtained from parents, for each child prior to a school trip, annual permission for regular visits.
- Staffing ratio levels must be maintained throughout the visit.
- First Aid should be accessible either through an appointed person with the visit or by the venue facilities. Copies of information containing emergency contact/medical/allergy details should be available at all times.
- A head count must take place before leaving school (or on the coach) and at regular intervals throughout the whole visit. Transport must not be allowed to depart until two adult members of the party have independently counted and agreed that all pupils are present.
- Toilet facilities must be provided at regular intervals.
- Food and drink should be provided at regular intervals. On very hot days it may be necessary to provide extra drinks.
- Where applicable, meeting points should be pre-designated and specific times arranged for party assembly. These times should be strictly adhered to.
- The transport must be fully insured, and all seats should be forward facing and have seat/lap belts fitted. The maximum seating capacity of the vehicle must not be exceeded and pupils must never travel standing. The driver's documentation must be valid. If the driver is not supplied by an external provider then it must be checked.

Pupils must be informed of any rules and regulations relating to the visit. All adults must know which pupils they are responsible for and likewise the pupils must know to whom they are accountable. Written guidance should be issued to pupils and parents where necessary.

The school should however recognise that it is in the nature of the behaviour of children and teenagers that instructions may be disobeyed through forgetfulness or wilful disobedience. It should also be recognised that through their inexperience children and teenagers are unable to make a reasonable analysis of potential risks, and thus they may need to be protected from their own behaviour. Therefore, teachers should not proceed on the basis that all children will obey instructions, but will take the necessary steps to ensure that instructions are followed at all times.

At the end of each visit the group leader should review the trip (use of the form 'Evaluation of the Visit to be Completed by the Group Leader for Future Reference') and amend any risk assessments if the trip is to be repeated on a future date. Risk Assessments will be prepared for all aspects of a school trip for which the school are actually organising (i.e. transport to and from venue, leisure activities at a centre etc.). Activities undertaken under the supervision of instructors when visiting organised centres will be the responsibility of the centre. School risk assessments should be reviewed either after a trip or annually, all supervising adults going on the trip should be made aware of, and understand, the control measures introduced as a result of the risk assessment. They should be asked to signify their understanding and acceptance of the resources required. School risk assessments should be attached to **Form A** and sent to the Outdoor Education Adviser at least four weeks prior to the visit.

## **10. APPROVAL PROCESS**

Where a member of staff propose to arrange an off-site activity the approval of the Head teacher/ Educational Visits Coordinator (EVC) must be obtained, using **Form A**, before any commitment is made on behalf of the school. Sufficiently detailed proposals must be provided by the member of staff to allow for an informed decision to be made.

Visits will fall into a 3 Category approval / monitoring process:

Category A – visits vetted at school level only

Category B – visits over which SCE needs to keep a watching brief

Category C – visits for which SCE must be asked to approve at the outset of planning

Where the off-site visit involves high-risk activities, the group being away for a period of more than 24 hours, an overnight stay, an activity on or near water or a journey by sea or air, the Head teacher/EVC will seek the approval of the Outdoor Education Adviser before sanctioning the activity (**Form A**), at least 4 weeks prior to the visit. **Form A must be accompanied by detailed risk assessments.**

### **Category A Activities**

Activities classed as Category A must have the approval of the Head teacher/EVC, who should be satisfied with the purpose, planning and staffing for the proposed off-site activity. **Form A** can be used for this purpose, although not all parts will be relevant.

### **Category B Activities**

As well as approval of the Headteacher/EVC the approval of the Outdoor Education Adviser should sought. **Form A**.

### **Category C Activities**

Approval for off-site activities involving hazardous pursuits or in areas of high risk must, in the first instance, be obtained from the EVC, Headteacher and Outdoor Education Adviser. He will provide advice and assistance where necessary in order that approval can be given. Again **Form A** should be used for this purpose. (At least 4 weeks prior to the date of the trip with relevant risk assessments attached).

### **One off Specific Visits**

**Form C** must be used for this type of visit. Parents should complete the form including the medical information, sign and return to school indicating whether or not they are giving permission for their child to participate in the visit.

### **Regular Visits**

**Form D** can be used for regular out-of-school visits, this form can be signed on an annual basis by the parent giving consent for trips within the neighbouring area of the school i.e. environmental studies, swimming events, sports fixtures etc. Although it will still be necessary to provide parents with information of any planned visits i.e. actual times and dates, it will be up to the parent to let the school know if they do not want their child to go along, rather than waiting for permission slips to be returned.

## **11. MONITORING OFF-SITE EDUCATIONAL VISITS**

Responsibility for safety on a visit lies with the Headteacher and is delegated in the following way.

1. The Group Leader is the visit organiser. He or she must ensure that their proposed visit is organised in accordance with SCE and school policy and procedures.
2. An appointed person, the Educational Visits Coordinator (EVC) liaises with the group leader and is responsible for ensuring that each visit is organised in accordance with SCE and school guidance and policy.
3. The Headteacher samples and monitors the work of the EVC and group leader in order to be assured that guidance is followed and that safe practice is taking place.
4. The Headteacher, through the EVC, monitors compliance and practice on Category A educational visits. (Those that are local and within the school day)

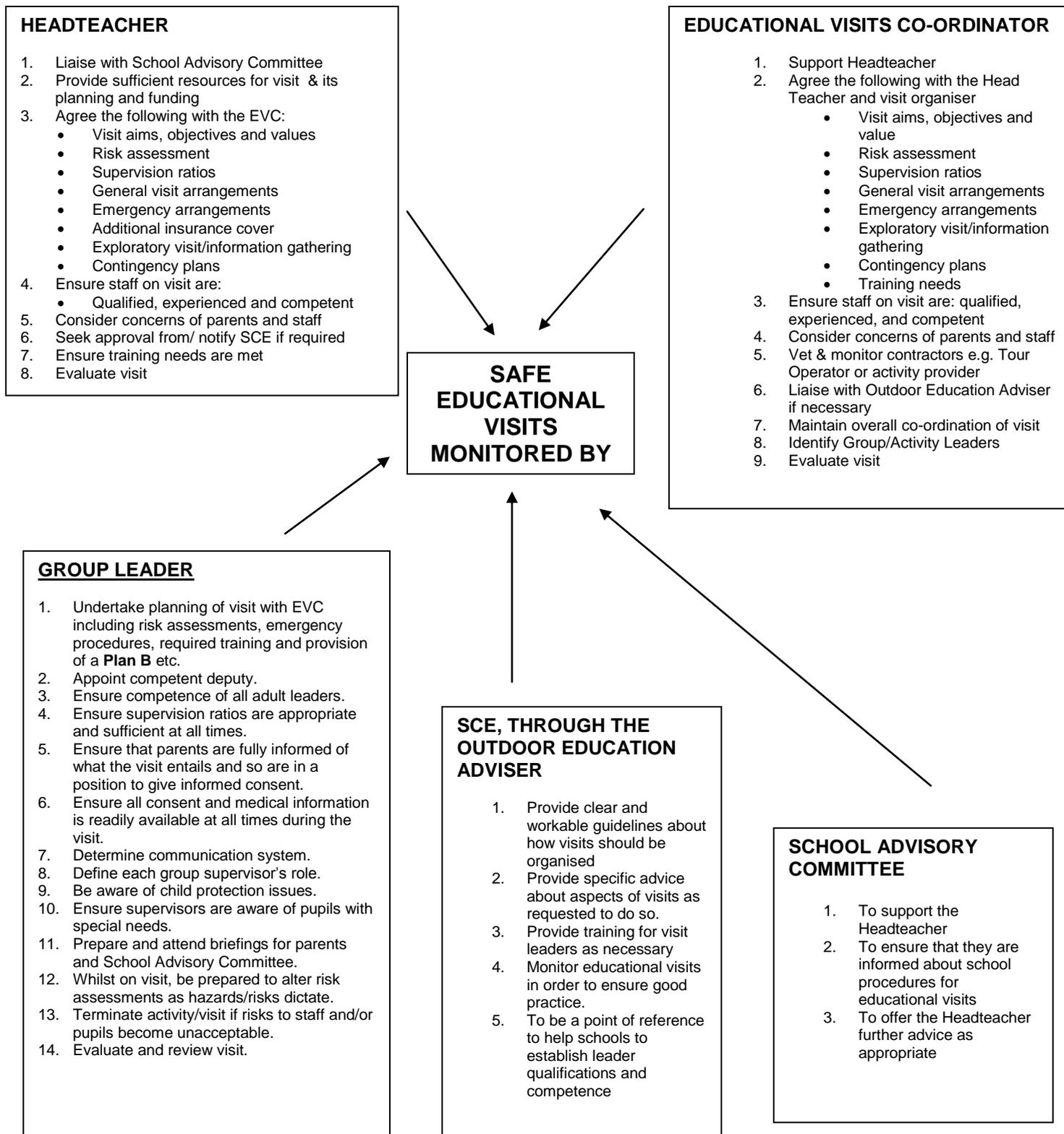
Any of the above may seek further assistance from the Outdoor Education Adviser.

SCE monitoring of educational visits occurs in the following way.

1. The Outdoor Education Adviser receives notification and approval forms, together with risk assessments, for the activities that are to take place and for the venues to be visited. He makes a judgement as to the suitability of the arrangements in order to ensure that children are safe, that staff are competent and that they do not place themselves at risk of criticism.
2. The Outdoor Education Adviser samples activities that are notified to him and visits groups whilst they are out of school. Such visits are intended to be entirely supportive, encouraging as well as ensuring good practice.

## 12. RESPONSIBILITIES FOR THE ORGANISATION OF SAFE EDUCATIONAL VISITS

The following outline of responsibilities of those involved with undertaking Educational Visits is not exclusive. If required, prior to organising a visit, further guidance should be sought from the DfES guidance "Health and Safety of Pupils on Educational Visits", or the Outdoor Education Adviser.



## Specific Responsibilities

### SCE

Through the Outdoor Education Adviser, SCE has the following responsibilities:

Provide written guidelines for headteachers and teachers, including advice on risk assessment.

Assess and approve proposals for certain types of visits.

Ensure training needs are catered for.

Provide advice to members of staff as necessary.

### Headteachers must:

ensure that all school visits have a specific and stated objective;

ensure that the group leader's plans for the visit adhere to the SCE guidelines and regulations, and the school's health and safety policy;

ensure that the group leader reports back to them after the visit

ensure that they are informed of less routine visits well in advance;

assess proposals for specific types of visits i.e. category B and C visits (See Approval process) and submit to the Outdoor Education Adviser for approval;

approve Category A visits as appropriate;

Headteachers must also:

- be satisfied that the visit has been planned effectively and that any risks identified by a risk assessment are minimised;
- be clear about their own role if they are going on the visit as a group member/supervisor. In these circumstances they must follow instructions of the group leader who is in sole charge of the visit;
- ensure that all staff accompanying the visit are appropriately selected and have the expertise, experience and qualifications relevant to the activities;
- ensure that the group leader has experience in supervising the specific age of the pupils on the visit and is able to organise the group effectively;
- ensure that the group leader, or an accompanying teacher, is familiar with the venue and is suitably competent to instruct the activity;
- ensure that the group leader is given sufficient time to plan and organise a visit properly;
- ensure that the ratio of adults: pupils is appropriate and suitable;
- ensure that child protection procedures are in place;
- ensure that the Outdoor Education Adviser has approved the visit if appropriate;
- ensure that parental consent forms have been issued and returned signed;
- ensure that suitable arrangements have been made for the medical and special needs of all pupils;
- ensure that first aid provision is available;
- ensure that the mode of transport is appropriate and that outward/inward journey times are clear;
- ensure that there is relevant insurance cover;
- ensure that they have details of the venue including address, telephone number and contact name;
- ensure that a school emergency contact has been nominated and that the group leader has these details;
- ensure that the group leaders, supervisors and school contact have a copy of the agreed emergency procedures and the names of ALL members of the group, with emergency contact details of parents/guardians or next of kin;
- ensure that there are contingency plans in place for delays or alternative arrangements should the original visit have to be cancelled e.g. bad weather;
- ensure that where appropriate, the Outdoor Education Adviser has been issued with Form A (notification or approval) and a copy of all risk assessments at least four weeks before the visit, and one week before the visit, Form E, with the emergency contact details of the school, accompanying adults and all pupils.

The Head teacher can delegate tasks to the group leader who undertakes much of the planning and organisation.

\*Ideally one of the teachers accompanying the visit should have general health and safety training (including risk assessment) and/or specific EVC training.

### **The Educational Visits Co-ordinator (EVC)**

Each school must have an EVC; in many cases this will actually be the headteacher. However, it may also be a teacher or another member of school staff – in which case the EVC will be appointed by and act on behalf of the headteacher. The formal recognition of an EVC will help the school to fulfil its health and safety obligations for off-site visits. If there is no EVC then the duties will pass by default to the head teacher. The EVC will be involved in the planning and management of visits including adventurous activities led by other members of school staff. The functions of the EVC are to:

- liaise with the Outdoor Education Adviser to ensure that all educational visits meet with the requirements of SCE, including those of risk assessment;
- support the headteacher with approval and other decisions;
- assign competent people to lead or supervise a visit;
- assess the competence of leaders and other adults proposed for a visit. This may include reference to awards, practical observations or verification of experience;
- organise the training of leaders of visits i.e. first aid, hazard awareness etc;
- ensure that CRB disclosures are in place as necessary (no-one should have unsupervised access to children unless fully CRB cleared);
- work with the group leader to provide parents with full details of the visit enabling parents to accept or refuse consent on the basis of being fully informed;
- ensure that emergency procedures are in place and that there is an emergency contact for each visit;
- review systems and, on occasion, monitor practice.

The EVC must be competent to fulfil the role in relation to the size of the school and the extent and nature of the planned visits. The headteacher and the EVC must agree the delegation of tasks and the way in which the role of EVC will work within the school.

### **The Group Leader**

The group leader is the teacher whom the headteacher has approved to take overall responsibility for the supervision and conduct of the visit, and for the health and safety of the group.

The group leader must:

- obtain the headteachers prior agreement before any visits take place;
- follow all the SCE regulations, guidelines and policies;
- define accompanying supervisors roles and ensure tasks are assigned;
- have the ability to control and lead pupils of the relevant age group;
- be suitably competent to instruct pupils in the activity and be familiar with the venue;
- be aware of child protection issues;
- ensure that there is adequate provision for first aid provision;
- undertake and complete the planning and preparation, brief all group members and parents;
- Ensure that risk assessments are prepared.

### **Teachers**

Accompanying teachers must:

- do their best to ensure the health and safety of everyone in the group;
- act as any reasonable parent would in the circumstances;
- take reasonable steps to avoid exposing pupils to dangers that are foreseeable and beyond those that the pupils can reasonably be expected to cope with;
- Consider stopping the visit or the activity and notify the group leader if s/he thinks there is an unacceptable risk to the health and safety of the pupils in their charge.

### **Volunteers**

- Non-teacher adults must be clear about their roles and responsibilities.
- Volunteers must not be left in sole charge of pupils except where they are CRB cleared and it has been previously agreed as part of a risk assessment.
- They must follow the instructions of the group leader and teachers and assist with control and discipline.

### **Pupils**

Older pupils in particular have a part to play in avoiding risk to health and safety, they must:

- not take unnecessary risks;
- follow instructions of the group leader, teachers, instructors and people within the venues;
- follow the schools dress and behaviour conduct;
- when abroad, be sensitive to local customs;
- be aware of anything that may cause themselves or others harm, speak to their group leader or teacher if they are concerned.

### **Parents**

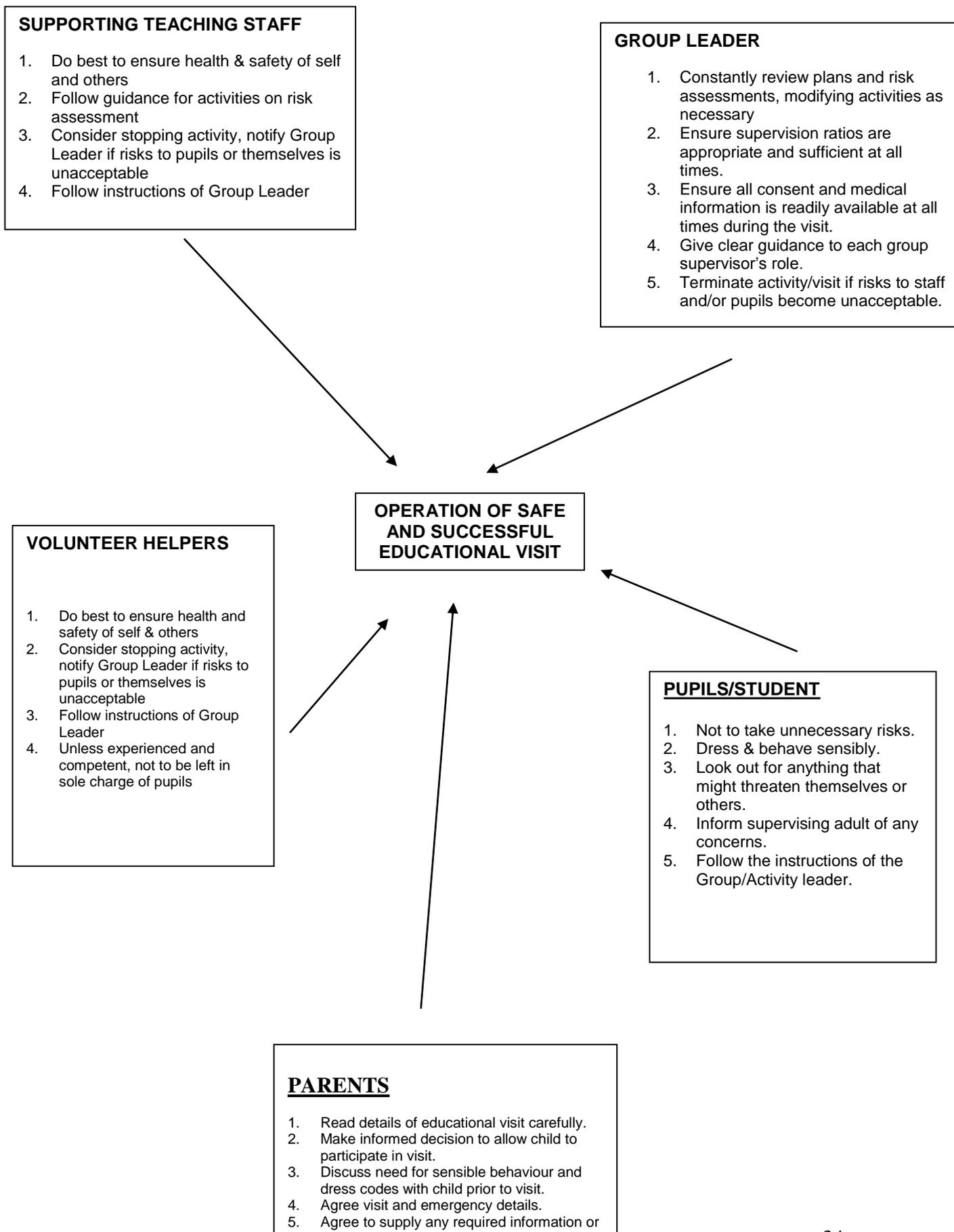
Parents have the responsibility of ensuring that their child is following the school dress code, preparing their child for participation and accepting that a child who is a risk to the health and safety of either him/herself or others may be sent home early.

Parents must inform the school about any medical needs / allergies / special dietary needs etc. of their child.

When children are going on a residential trip, parents must supply an emergency contact name and telephone number; this contact must be available for the duration of the trip.

The school must inform the parents about all aspects of the visit to enable them to make an informed choice as to whether or not they want their child to participate.

# ROLES AND RESPONSIBILITIES IN THE SAFE OPERATION OF EDUCATIONAL VISITS



# **13. IMMEDIATE ACTION FOLLOWING A SERIOUS ACCIDENT OR INCIDENT**

## **Guidance Notes for Group Leaders**

A serious accident or incident is defined as

- an accident leading to a fatality, serious or multiple fractures, amputation or other serious injury;
- circumstances in which a party member might be at serious risk/serious illness; or
- any situation in which the press or media might be involved.

*Remember that serious accidents and incidents are extremely rare, but if one occurs it certainly makes great physical and emotional demands upon you. These guidance notes are designed to help you deal with an emergency.*

*Remember that you are not alone; SCE and your school will support you as much as possible.*

### **1. Be prepared**

- Ensure that you are familiar with all of the SCE guidelines for off-site activities.
- Brief your group on emergency procedures before they set off, including details of communications, so that they know how to deal with situations should the party get split up.

### **2. Care of the Group**

- Ensure safety from further danger.
- Contact local emergency services immediately and follow their advice.
- Deploy other staff/adults as effectively as possible in continuing to ensure the welfare of your group.

### **3. Communication**

- Contact the schools 24-hour standby person.
- In either event, give the following information:
  - Your name
  - Name of group
  - Telephone number you are calling from
  - What happened
  - To whom
  - Where
  - When
  - What has happened since
  - If a fatality is involved, has this been confirmed?
  - By whom
  - Which local emergency services are involved.

### **4. Next Steps and General Advice**

- Parents and relatives will naturally be anxious to establish what is happening, but do NOT let party members (staff or young people) telephone home until after you have made contact with SCE and this has been agreed.
- Do NOT speak to the press or media. Refer enquiries to the local emergency services handling the incident on the ground and promise that “an official statement will be made through the SCE Media Team as soon as possible”.
- Do NOT admit liability of any sort to anybody.
- Do NOT allow anyone, apart from medical services, to see any party member without an independent witness being present.
- Retain any equipment involved in an unaltered condition.
- Keep a written record of all that happens.
- Be as compassionate as possible, with anyone involved.

- Remember that no one, unless they are in a relevant official capacity, has the right to see anyone who does not wish to see them.
- If you change location, remember to let your Headteacher/ School contact person have the new telephone number at which you can be contacted.

*Finally, all situations are different, your Headteacher or a Senior Officer of the Agency will make themselves available to offer you advice and support. Use them as much as you need.*

### **Guidance Notes for Headteacher/ School 24 hour Standby Person (s)**

In the event of a serious accident or incident involving a group on any form of school outing, it is paramount that the group leader should receive as much advice and support as he or she needs.

A serious accident or incident is defined as:

- an accident leading to a fatality, serious or multiple fractures, amputation or other serious injury;
- circumstances in which a party member be at serious risk/serious illness; or
- any situation in which the press or media be involved.

Serious incidents are fortunately rare – this can however lead to complacency that must be guarded against. Therefore, you will need to “think on your feet”. This could be difficult under pressure and the following guidelines will help.

#### **1. Be prepared:**

You must have immediate access to these procedures and the information and means to use them, at all times.

- Make sure you are familiar with all the SCE guidelines for off-site activities.

#### **2. Answering the Emergency Call**

You will need to gain and record the following:

- Name of Group
- Name of Group leader/Caller
- Telephone number the caller is speaking from
- What happened
- To Whom It May Concern
- Where
- When
- What has happened since

*If a fatality is involved or suspected*

- Has this been confirmed?
- By whom?
- Which emergency services are involved?

#### **3. General Advice**

Advise the group leader to follow instructions from the local police/emergency services but unless they specifically request otherwise, your advice to the group leader should be to:

- keep the party together;
- co-ordinate any contact with parents or any outside bodies;
- refer media attention to the police or SCE Media Team – do not answer questions.

Remain available: if it is necessary for the party to change location they must advise you of the new telephone number.

## **14. FIRE PRECAUTIONS AND EVACUATION PROCEDURES**

### **Precautions:**

Premises with fire certificates must have fire routine notices. Ensure that all members of the group understand them - do not take it for granted that they will read them without prompting. If necessary, read the instructions to them.

Obtain advice from the management on the means of escape available, and investigate ALL means of escape to ensure that they are adequate and unobstructed. Emergency exit doors need to be checked to ensure that they can be readily opened from the inside. Check on fire alarm call point positions.

Supervisory staff should have rooms next close to party members.

A fire drill must be conducted as soon as possible after arrival using the alarm systems available. This drill must be taken seriously and repeated if necessary until the group leader is confident that every member of the group would. It may be in a hotel or a hostel that a full fire practice is not possible. In this case it is important to run through fire procedures with the group, describing what to do in the event of a fire alarm and showing them routes of escape and assembly points.

- recognise the alarm;
- know the most suitable escape route;
- be aware of any other emergency fire procedures relating to those particular premises;
- proceed to the assembly point in an orderly manner.

A suitable assembly point must be established.

### **In the event of fire:**

- Give priority to the evacuation of persons in your group.
- If it is safe to do so, check that those in your group have heard the alarm and are evacuating the premises.
- Do not use lifts.
- Do not attempt to collect baggage, valuables, etc.
- Check that all persons are accounted for by carrying out a roll call. Sub-groups are particularly useful for carrying this out accurately and speedily.
- If any members of the group are missing, report them immediately and without fail to the Fire Officer in charge at the scene.
- On no account should you or any member of your group re-enter the premises to locate or attempt to rescue missing persons after carrying out the procedure above.

Extra precautions must be put into place to ensure the safety of SEN pupils/adults, particularly those with hearing or sight impairments and those with walking aids or in wheelchairs

## 15. REFERENCES

- Health and Safety of Pupils on Educational Visits (*HASPEV*), DfES 1998
- Health & Safety : Responsibility and Powers, December 2001  
Ref: DfES/0803/2001

Together with the three later supplements to *HASPEV*

- Standards for LEAs In Overseeing Educational Visits - Part 1 of a 3-Part Supplement to Health and Safety of Pupils on Educational Visits, July 2002. Ref. DfES /0564/2002
- Standards for Adventure - Part 2 of a 3-Part Supplement to Health and Safety of Pupils on Educational Visits, July 2002. Ref. DfES /0565/2002
- A Handbook for Group Leaders - Part 3 of a 3-Part Supplement to Health and Safety of Pupils on Educational Visits, July 2002. Ref. DfES /0566/2002
  
- Guidance on First Aid For Schools, DfES 1998
- Supporting Pupils with Medical Needs, DfES 1996
  
- Managing Medicines in Schools and Early Years Settings, March 2002, 1448-2005DCL-EN

Report on the tragedy in Glenridding Beck in 2002  
[www.hse.gov.uk/schooltrips/investigation/index.htm](http://www.hse.gov.uk/schooltrips/investigation/index.htm)

## ROUTE THROUGH THE PROCEDURES

To ensure a safe and successful off-site visit the following procedures should be adopted:

- Discuss the proposed visit with your EVC.
- Read and familiarise yourself with the school / DfES/ SCE guidelines for safe procedures on educational visits.
- Complete Form A, **Visits Approval Form**, and return to your EVC together with appropriate risk assessments. For Category B and Category C visits, a copy of Form A and all relevant risk assessments must be sent to the Outdoor Education Adviser at least **four** weeks prior to the visit.

The Outdoor Education Adviser will read and check the documentation, contacting the group leader if there are any problems. He will then write to the school in order to give approval for the visit.

Send out information to all parents concerned describing the activity (applicable to all off-site visits).

- Parental Consent must be given for all off-site visits. However there are two different Parental Consent Forms that can be used:
  - Form C – for specific annual visits. The consents forms requests medical and emergency contact information.
  - Form D – for regular out of school activities (i.e. sporting fixtures) or activities in the local/neighbouring areas (environmental studies, visits to local shops/parks/churches). Parents should be asked to sign their consent on an annual basis; however, they must still be informed of times/dates and venues of any proposed visits. This form then puts the onus on parents to withdraw their child from any activity.
- For Category B and C visits, Form E should be completed with the schools emergency contact information. This should be given to the EVC along with a copy of all the parental consent forms. The EVC must ensure that a copy of form E is forwarded to the Outdoor Education Adviser at least **one week** prior to the visit.
- During the week following the visit the group leader should complete an evaluation form and forward a copy to the EVC and to the Outdoor Education Adviser
- The school accident book should be completed if there were any accidents/incidents whilst on the visit. If appropriate a P25 accident form should also be completed with a copy forwarded to the Health and Safety Team. If the accident resulted in serious injury it may also be necessary to obtain witness statements, attach to the schools copy of the P25.
- Review the risk assessments especially if there were any accidents/incidents, site changes or categories that had been omitted.

### Checklist whilst on the visit

1. The group leader must carry a copy of all consent forms at all times.
2. Where sub-groups are organised, the supervisor of the sub-group must carry a copy of the consent forms for his or her group.
3. All supervisors must carry a group contact list and emergency contact details at all times.
4. The following must be left with the schools 24 hour contact person:
  - a. The group contact list
  - b. A copy of all parental consent forms (Form C)
  - c. The emergency contact details (Form E)
  - d. The travel and timing details
- i. The following information must be left in the school office:
  1. The group contact list
  2. The emergency contact details (Form E)
  3. The travel and timing details

**SCE OUTDOOR EDUCATIONAL VISITS.**

**CHECKLISTS, CONSENT AND APPROVAL  
FORMS.**

# APPROVAL OF EDUCATIONAL VISITS BY SCE

## 1. Ensuring Visit Safety

The General principles for checking proposals for visits rest on:

- The actual activity
- Where it is to be undertaken
- The ratio of supervising adults to pupils
- The competence of the leaders
- Risks associated with the visit being assessed
- The ability of the group

Health and safety law requires that activities are appropriately monitored but this monitoring only needs to be proportionate to the general level of risk to be expected.

Visits will fall into a 3 Category approval / monitoring process:

Category A – visits vetted at school level only

Category B – visits over which SCE needs to keep a watching brief

Category C – visits for which SCE must be asked to approve at the outset of planning

The following paragraphs explain the differences between the categories in terms of the types of visit.

N.B. The majority of incidents that have occurred on school visits in recent years have been within Category B and Category C visits.

## **CATEGORY A – VISITS VETTED AT SCHOOL LEVEL ONLY**

The key issue is that leaders require only general teaching skills to preside competently over a visit. The headteacher will normally assess the competence of the individual to lead this category of visit and will vet and approve these visits. In this case the headteacher needs no special assistance from the Outdoor Education Adviser to make the appropriate judgements, beyond observing the Agency guidance.

### **Types of Visits that fall into Category A**

- Walking in parks or non-remote country paths
- Field studies in environments presenting no technical hazards
- Regular locally based activities such as sporting events, cycle proficiency training, environmental studies in the local park, 'independence training' for special needs groups, visits to local shops for cooking provisions etc.
- Special day visits further afield e.g. to museums, seasonal events etc.
- Non-adventure sporting activities – not involving an overnight stay

### **Action**

The general principles of responsibility, planning and risk control apply but the level of detail recorded should be kept within reason and proportionate to the complexity and level of the risk involved. For routine and frequently repeated activities generic may suffice but headteachers will need to make judgements about this in individual situations.

The headteacher approves the visit without involving the Outdoor Education Adviser, except for general advice where required.

## **CATEGORY B - VISITS THAT REQUIRE APPROVAL BY SCE**

Visits that involve a higher profile or have medium risk activities. Safe supervision requires that the leader should, as a minimum, have undergone an additional familiarisation process or induction specific to that activity and/or location. The Leader will have been approved by the headteacher and by SCE as appropriately competent for the activity in question.

***Types of visits that fall into Category B will include the following. (Unless they take place in remote locations or involve adventurous activities at non-AALA\* registered centres and thus fall into Category C below)***

- Visits which involve an overnight stay
- Camping
- Cycling on road or non-remote off road terrain
- Low-level initiative challenges
- Visits involving outdoor and adventurous activities that are in AALA registered or other approved centres and organised/controlled by staff from those centres
- Visits with increased insurance premiums

### **Action**

After obtaining approval from the Headteacher or EVC, the party leader must send the completed Approval Form (Form A) plus an up to date risk assessment with supplementary information (e.g. routes, itinerary, details of pupils and staff and staffing ratios etc) to the Outdoor Education Adviser

**A minimum of four weeks for notification will suffice for most visits but for major visits, or visits involving the commitment of non-returnable deposits or the use external providers, a recommendation in principle should be sought before any such financial commitment is made.**

## **CATEGORY C – VISITS WHERE SCE MUST BE ASKED TO APPROVE AT THE OUTSET OF PLANNING**

This is the category where the level of risk involved is likely to be at the highest level that can be justified for an educational visit.

The visit involves an activity that requires a specific level of training or qualification listed in the qualification matrix (see below). It includes all those activities that, if not school-led, would in the UK fall within the scope of the Adventurous Activities Licensing Regulations 1996.

Issues can arise quite simply as a result of leaders not having the appropriate competencies for what might be regarded as relatively routine adventure activities. They could also arise from a really challenging exploration visit abroad. Winter conditions or heavy rain can also make a huge difference to risk levels in mountains or gorges.

### **1. Visits that fall into Category C will include activities that are:**

- In water, or near water where the presence of water poses a significant risk to the activity.  
(Not including curriculum swimming sessions/galas)
- In winter conditions
- On or near cliffs or steep terrain
- In an area subject to extremes of weather or environmental change
- In developing countries or those with civil unrest
- School led visits that would, in the UK, come within the scope of AALA e.g. walking in wild country areas.

### **Action**

After obtaining approval from the headteacher, the party leader must send the completed Form with supplementary information (e.g. routes, itinerary, and risk assessment) etc. direct to the Outdoor Education Adviser

Following satisfactory appraisal of the visit details, the Outdoor Education Adviser will give written confirmation.

### **2. Special Cases**

Where a school uses an approved centre but leads its own activities, the school will be deemed to hold the responsibility for the activity and must notify SCE in accordance with the procedure set out above. Even in this situation, centre staff will be willing to give verbal advice and help in the planning stage or during a preliminary visit.

#### **Duke of Edinburgh's Award**

The Army Welfare Service is the licensed operating authority for the Duke of Edinburgh's Award for BFG. Application should be made to the AWS for all D of E activities.

### **3. Staff Competence and Development**

Obviously headteachers are best able to make judgements about the general suitability of individual staff to lead off-site activities. However, assessment of technical competence, for outdoor pursuits especially, is more difficult. Where staff do not hold a formal qualification, but are nevertheless

highly competent practitioners, they should be encouraged to seek appropriate national qualifications. SCE recognition of instructor competence is based on one of two routes:

- Possession of the relevant award of the appropriate National Governing Body
- The submission of personal experience to the Outdoor Education Adviser, who has subsequently arranged for it to be vetted by a suitable Technical Adviser and assessed as appropriate

#### **4. Activities Requiring Approval of SCE**

The activities listed below are those where SCE is obliged to exercise direct approval. Activities here are generally classed as Category C (see above).

##### **Adventure Activities**

Rock climbing and abseiling

Mountaineering

Gorge or coastal scrambling

Kayaking

Canoeing

Sailing (including wind surfing)

White-water and improvised rafting

Water-skiing

Underground exploration

Skiing (including dry slope)

Snorkel and aqualung diving

Air activities (excluding commercial flights)

All forms of boating (excluding commercial transport)

Horse riding in mountainous or remote areas

Mountain biking in remote off-road terrain

Open water swimming

Other activities (e.g. initiative exercises) involving any of the above activities

##### **Wild Country**

Wild Country is defined as upland areas where the party may, of necessity, be dependent on itself and remote from help, and areas subject to tidal variations. There is no arbitrary upland height limit since local and seasonal influences have major significance. Leaders will need to be aware of and apply appropriate precautions, commensurate with the group, time of year and characteristics of the terrain in which they are operating.

**APPLICATION FOR APPROVAL OF EDUCATIONAL VISITS BY THE HEAD TEACHER  
OR OUTDOOR EDUCATION ADVISER**

This form should not be used for Duke of Edinburgh's Award activities. Approval for these activities should be sought from the Army Welfare Service

*Not all sections will be relevant to every proposed visit.*

**School:** \_\_\_\_\_

**Group Leader (Name):** \_\_\_\_\_

**Residential/Day Visit:** \_\_\_\_\_

**Venue:** \_\_\_\_\_

The group leader should complete this form as soon as possible once the preparations are complete. The group leader should have already received the approval of the headteacher for the proposed visit in principle and should have regularly updated the headteacher on the progress of the preparations. The headteacher should be informed of any subsequent changes in planning, organisation, and staffing. The headteacher should seek approval from the Outdoor Education Adviser for Category B and C visits.

**1. Purpose of visit and specific educational objectives (continue on separate sheet if necessary):**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**2. Dates and times:**

Date of Departure: \_\_\_\_\_ Date of Return: \_\_\_\_\_

Place of Departure: \_\_\_\_\_ Place of Return: \_\_\_\_\_

Time: \_\_\_\_\_

Time: \_\_\_\_\_

**3. Transport Arrangements:**

\_\_\_\_\_

**4. Organising company/agency (if any):**

Name: \_\_\_\_\_ Address: \_\_\_\_\_

\_\_\_\_\_

Tel: \_\_\_\_\_

**5. Proposed cost and financial arrangements:** \_\_\_\_\_

\_\_\_\_\_

**6. Insurance arrangements for all members of the proposed group, including voluntary helpers:** Include the name of the Insurance Company. *(Any curriculum based visits are automatically underwritten by the MoD)*

Insurance Cover: \_\_\_\_\_ Policy No.: \_\_\_\_\_

Address of Insurance Company: \_\_\_\_\_  
\_\_\_\_\_

Expiry date of Policy: \_\_\_\_\_

**7. Accommodation to be used:**

Name: \_\_\_\_\_ Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone number: \_\_\_\_\_

Name of Head of Centre/Proprietor/Contact: \_\_\_\_\_

Emergency contact details (if different from above): \_\_\_\_\_

**8. Details of the programme of activities:** (continue on separate sheet if necessary)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**9. Details of any hazardous activity and the associated planning, organisation and staffing:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**10. Names, relevant experience, qualifications and specific responsibilities of staff accompanying the group, including First Aid:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**11. Names, relevant qualifications and specific responsibilities of other adults accompanying the group:**

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**12. Name, address and telephone number of the contact person in the home area who holds all information about the visit or journey in case of an emergency:** (Note person/s with this role will need to be available on a 24-hour contact basis)

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**13. Existing knowledge of places to be visited and whether an exploratory visit is intended:**

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Date of last staff visit: \_\_\_\_\_

**14. Size and composition of the group:**

Age range: \_\_\_\_\_ Number of Girls: \_\_\_\_\_ Number of Boys \_\_\_\_\_

Number of accompanying adults: \_\_\_\_\_ No. of Males: \_\_\_\_\_ Females: \_\_\_\_\_

Teacher / student ratio: \_\_\_\_\_ Leader / participant ratio: \_\_\_\_\_

**Information about parental consent and risk assessment:**

A COPY OF THE INFORMATION SHEET SENT TO PARENTS, THE PARENTAL CONSENT FORM AND RISK ASSESSMENTS ARE ATTACHED.

**15. Have any of the participants any special educational or medical needs:**

**YES/NO**

If yes, please state what arrangements are in place

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Group Leader, full name: \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Headteacher, full name: \_\_\_\_\_

**PLEASE NOTE**

Where the visit falls into **Category B** or **Category C** this form, together with risk assessments and any further information, should be forwarded to the Outdoor Education Adviser at least **four weeks** before the visit is due to depart.

**Form B. Approval of an Educational Visit**



School Effectiveness Branch  
**SERVICE CHILDREN'S EDUCATION**  
Block 19, Rochdale Barracks  
British Forces Post Office 39



Tel: Bielefeld Mil 3511  
Tel: Civil (00 49) 0521 9254 3511  
Fax: Bielefeld Mil 3601  
Fax: Civil (0049) 0521 9254 3601  
e-mail: richard.simpson996@land.mod.uk

	Your Ref:
	Our Ref:
	Date:

School:

Visit to:

Dates:

Thank you for your application for approval for an educational visit.

I am pleased to approve the visit and its organisation as described in the documentation that I have received.

**Please let me have your report and evaluation of the visit, including details of any incidents, within 14 days of the party returning.**

With best wishes for a safe and successful educational visit.

Yours sincerely,

Richard Simpson  
Outdoor Education Adviser



INVESTOR IN PEOPLE

**EDUCATIONAL VISIT PARENTAL CONSENT/INDEMNITY**

To be distributed with an information sheet giving full details of the visit.

Please complete this form as fully as possible. The completing of this form will not only consent the pupil stated below to attend and participate in activities as described in documentation given to you by the school, but also, provide essential information in the event of an emergency. If you have any queries as to the nature of activities or conduct of the educational visit, please do not hesitate to contact the group leader in charge of the visit. If you require any assistance in completing this form, please contact your child's class teacher.

Name of Participant: \_\_\_\_\_ Form: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_ Post Code: \_\_\_\_\_

1. Details of Visit

Visit to: \_\_\_\_\_

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

***I have read the information sheet and hereby consent to the attendance of my son/daughter, upon the above educational visit. I also agree to his/her participation in any or all of the activities involved. I acknowledge the need for obedience and responsible behaviour on his/her part.***

2. **Medical Information about your child**

(a) Any conditions requiring medical treatment, including medication? **YES/NO**  
If **YES**, please give brief details and describe the medication, dosage and frequency required:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(b) Please outline any food or other allergies and special dietary requirements of your child:

\_\_\_\_\_  
\_\_\_\_\_

(c) Any recent illness or accident which staff should be aware of?

\_\_\_\_\_  
\_\_\_\_\_

(d) The type of pain/flu relief medication your child may be given if necessary:

\_\_\_\_\_

(e) Does your child suffer from travel sickness? **YES/NO. Have you provided him or her with sickness prevention tablets?**

## For residential visits and exchanges only

- (f) To the best of your knowledge, has your son/daughter been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may be contagious or infectious? **YES/NO**  
If **YES**, please give brief details:

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- (g) Is your son/daughter allergic to any medication e.g. penicillin/elastoplast? **YES/NO**  
If **YES**, please specify:

---

- (h) Approximately when did your son/daughter last have a tetanus injection? \_\_\_\_\_

### **DECLARATION**

*I agree to my son/daughter receiving medication as instructed and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present. I understand the extent and limitations of the insurance cover provided. I confirm that the contact details given below are to be used in the event of an emergency or in the event of my son/daughter being returned home for some other legitimate reason and that at least one of the named contacts will be available throughout the duration of the off-site visit. I confirm that I consent to my child taking part in swimming and water based activities as described to me*

### **3. Additional Information**

Swimming ability (for water based activities) e.g. requires armbands/confident etc.

---

Do you have any additional comments? Is there anything else about your son's or daughter's needs that it would be helpful for us to know about?

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### **4. Contact Telephone Numbers**

Parents/Carers: \_\_\_\_\_ Day/Work: \_\_\_\_\_

Mobile: \_\_\_\_\_ Evening/Home: \_\_\_\_\_

**Alternative emergency contact:** (please give two alternative contacts)

Name: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

Name: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

Name of Family Doctor: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

Address: \_\_\_\_\_

**Signed (Parent/Guardian):** \_\_\_\_\_ **Date:** \_\_\_\_\_

Full Name (capitals): \_\_\_\_\_

**THE GROUP LEADER MUST TAKE THIS FORM, OR A COPY OF IT, ON THE VISIT. A COPY SHOULD ALSO BE RETAINED BY THE ESTABLISHMENT CONTACT(S)**

**PARENTAL CONSENT  
REGULAR OUT OF SCHOOL VISITS/ACTIVITIES**

**Pupil:** \_\_\_\_\_ **Class/Year Group:** \_\_\_\_\_

I hereby agree to my son/daughter participating in recognised activities off the school site, but only if the visit is within the neighbouring area, for example, local environmental studies, swimming, and joint sporting activities with other schools, etc.

**I understand that:**

- I will be informed of the dates and nature of the activities prior to them taking place and will consequently have an opportunity to revoke this general consent if, in a particular situation, I wish to do so
- such activities will not often extend beyond the school day, but that if, occasionally, they are likely to do so, adequate advance notice will be given so that I can decide whether or not to consent to this and, if so, make appropriate arrangements for his/her safe return home
- my specific permission will be sought for any out-of-school activities beyond those outlined above and which could involve commitment to extended journeys or times, expense or hazards
- all reasonable care will be taken of my child in respect of the activity/visit
- my child will be under an obligation to obey all directions given and observe all rules and regulations governing the visit/activity and will be subject to all normal school discipline during the visit/activity
- any medical condition or physical disabilities will be notified to the school now and as and when they arise

**DECLARATION**

*I agree to my son/daughter receiving medication as instructed and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present. I understand the extent and limitations of the insurance cover provided. I confirm that the contact details given below are to be used in the event of an emergency or in the event of my son/daughter being returned home for some other legitimate reason and that at least one of the named contacts will be available throughout the duration of the off-site visit. I confirm that I consent to my child taking part in swimming and water based activities as described to me*

**Signature of Parent/Guardian:** \_\_\_\_\_

**Address:**  
\_\_\_\_\_  
\_\_\_\_\_

**Tel:** \_\_\_\_\_ **Mobile:** \_\_\_\_\_

**EMERGENCY CONTACT INFORMATION**

Copies, together with pupil contact list and parental consent forms to

- 1. Each member of staff on visit
- 2. School office
- 3. 24 hour emergency contact person

1. Name of Group Leader: \_\_\_\_\_

<b>Visit to:</b>
------------------

2. Visit Departure Date: \_\_\_\_\_

3. Return information:

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Location: \_\_\_\_\_

4. Group:

Total Number: Adult leaders: \_\_\_\_\_ Group Members: \_\_\_\_\_

5. Do you have emergency contact details for everyone in the group (including adults)? **YES / NO**

If **NO**, obtain the information. If **YES**, attach the details to this sheet).

## 6. Emergency Telephone Contacts for Educational Visits.

### For staff use only

School Mobile Phones: .....

.....

.....

### ***Leadership Team mobile phone:***

Position within school of contact person	Name of contact person (in order of contact)	<u>Telephone Number</u>	
Group Leader <b><u>on visit</u></b>	1.	Mobile phone number <b><u>on visit</u></b>	
Designated contact person for trip	2.	Home Times	School Times
Headteacher	3.		
Deputy Head	4.		

**The 24 hour emergency contact number for SCE is 0172 201 5543.**

This number may be used in emergency situations that are beyond the coping strategies of the visit 24 hour contact person and/or the Headteacher

### Other numbers:

Civil police: In Germany 110  
 Fire: In Germany 112  
 Ambulance: In Germany 112

### **NOTE**

If you have to leave a message at the school office, please make sure it is written down and repeated back to you.

**EMERGENCY CONTACT INFORMATION – ADDITIONAL INFORMATION FOR  
OVERNIGHT VISITS THAT MAKE USE OF A TRAVEL COMPANY**

**Travel Company:**

Name/Address: \_\_\_\_\_

Tel. No.: \_\_\_\_\_ Fax: \_\_\_\_\_

Company Travel Rep: Name: \_\_\_\_\_ Tel. No.: \_\_\_\_\_ Fax: \_\_\_\_\_

Insurance/Emergency Assistance: \_\_\_\_\_ Tel. No.: \_\_\_\_\_ Fax: \_\_\_\_\_

Hotel/Centre: \_\_\_\_\_

Address: \_\_\_\_\_

Tel. No.: \_\_\_\_\_ Fax: \_\_\_\_\_

Hotel contact (e.g. Rep/Manager): \_\_\_\_\_

Tel. No: \_\_\_\_\_

## **OFF-SITE ACTIVITIES PLANNING CHECKLIST**

The following list is intended to be used by Headteachers, Educational Visits Co-ordinators and Group Leaders prior to approval of a visit. It identifies the areas requiring written procedures, which will contain the safety measures and arrangements that must be adhered to during the visit.

<b><u>Items for consideration / production of documentary evidence / written procedures</u></b>	<b>Complete Yes/No</b>
Is there a clearly identified party leader, sufficiently experienced and competent to assess the risks and manage the proposed visit or activity?	
Is there a clearly identified purpose for the whole programme and any of its constituent parts, appropriate to the age and ability of the group?	
Is there adequate time and opportunity to prepare for the visit or activity?	
Have other staff and colleagues whose work may be affected been notified of planned arrangements?	
Is the proposed location of the visit suitable for the activity to be undertaken and manageable for the group and supervisory staff?	
Have seasonal conditions, weather and timing been fully considered?	
Has the visit proposal been submitted to EVC/Headteacher/SCE	
Has the Category of the visit been determined?	
In relation to the above, has approval been obtained from EVC/Head teacher/ SCE (Form A should be used in all instances)?	
Have adequate arrangements been made to finance the visit and manage the finances?	
Is there adequate and relevant insurance cover in place?	
Has Parental consent been obtained for the visit and for any hazardous activities which are planned and exchange of information regarding individual pupils been received?	
Has the party leader assessed the risks involved in all aspects of the visit or activity and recorded the significant findings?	
Has advice been sought from someone with expertise or technical competence where there is uncertainty about safe practice?	
Have transport issues been considered according to the numbers and supervision ratios required for the group?	
Are there suitable and sufficient qualified drivers for any planned school minibus journey?	
Will departure and return times be made known to staff, young people and parents?	
Is there a contingency plan, in the event of a delay or early return?	
Does the visit involve hazardous activities booked through an external provider? If so, has the provider been checked using the 'External Providers Checklist'?	
Is there a contact name, address and telephone number known for the visit venue?	

Other documents and guidance obtained and considered? E.g. references from previous users?	
Are members of staff, instructors or adult volunteers leading hazardous activities suitably qualified and experienced i.e. competent to do so?	
Are the group members' age, competence, fitness, and temperament, suited to the activity?	
Will the group have an acceptable staff/pupil ratio necessary for the activities proposed? Is this ratio sufficient to cover emergency situations?	
Have members of staff or adult volunteers been vetted, with regard to child protection, where necessary?	
Does staffing include male and female supervision, where necessary?	
Do plans and staffing ratios reflect the needs of individuals with disabilities?	
Are any pupils related to anyone acting in a supervisory role? Consideration given as to how the supervision will be dealt with	
Has feedback been collated from exploratory visits and any follow-up enquiries been made by the Head teacher and/or Group leader?	
If no exploratory visit has been undertaken, has action been taken to ensure the party leader is aware of potential hazards and facility arrangements? E.g. toilet, shelter etc.	
Has a nominated deputy party leader been identified and appropriately briefed in case of emergency?	
Identification of who will be responsible for first-aid, carrying accident forms, contact lists, maps, plans, money etc.	
Briefings – how, when and what information will be provided to parents, pupils and other adults accompanying the visit	
Do party members and staff have the appropriate clothing and equipment necessary for the activities proposed and allowing for a range of weather conditions?	
Is there an alternative programme/venue arranged in the event of poor weather, for example?	
Have the special educational or medical needs of pupils, staff and helpers been considered?	
Have specific needs been identified for any participants with disabilities?	
Has the quality and suitability of available equipment being supplied by the school been checked?	
Will the party members be properly briefed on the activities they will undertake during the visit?	
The briefing may need to include: <ul style="list-style-type: none"> <li>• Appropriate clothing and equipment</li> <li>• Rendezvous procedures</li> <li>• Safety risks of jewellery</li> <li>• Groupings for study or supervisory purposes</li> <li>• A system of recall and action in emergencies</li> <li>• Agreed codes of conduct and behaviour</li> <li>• Significant hazards</li> <li>• Relevance to prior and future learning</li> </ul>	
Will the party leader also brief adults and voluntary helpers?	

The briefing may need to include: <ul style="list-style-type: none"> <li>• Anticipation of hazards and the nature of the programme</li> <li>• Defining roles and responsibilities of staff and others</li> <li>• Careful supervision, to cover the whole time away</li> <li>• Standards of behaviour expected from young people</li> <li>• Regular counting of participants</li> <li>• How much help to give to young people in their tasks</li> <li>• A list of names of people in sub groups</li> <li>• Emergency procedures</li> </ul>	
Have suitable and sufficient first aid arrangements been made?	
Communication arrangements considered – incl. Mobile phone/radio policy	
Emergency/contingency procedures required including arrangements for contacting emergency services, British Embassy/Consulate (if abroad), Head teacher, Governors, dealing with media enquiries etc?	
Has a named point of contact been identified at home or at “base” in the event of an emergency, who has a contact list of the group members, including staff, and a programme of the group’s activities?	
Are staff aware of procedures and relevant phone numbers in the event of an emergency?	
Have emergency contact lists for pupils and staff been drawn up and given to those named as initial contact personnel.	
Do all supervisory staff know the accident and incident reporting arrangements?	
Have arrangements been considered for appropriate follow up work and evaluation after the visit?	
Has a report been provided for the Head or other colleagues, where appropriate, to share positive aspects of the visit and learn from problems or incidents?	
Have financial records been completed?	

**Timescales Guide:**

*At least three months before the trip:*

- Secure approval for the visit from senior management and/or SCE
- Select possible dates for the trip, liaising with the appropriate senior staff in the school
- Research activities and activity centres you are interested in
- Ensure that accompanying staff are appropriately qualified/experienced to lead particular activities or to supervise groups on visit
- Provisionally book your activities with the education centre to be visited, or equivalent
- Compile a rough budget for the trip and inquire into sources of funding
- Inform parents of intended trip (if residential is envisaged) along with outline of dates and estimated costs involved
- Investigate methods of transport and special group-rate fares

*At least one month before the trip:*

- Draft a letter to parents outlining dates, cost, equipment needed and the school's liability. Get the letter checked by the EVC before sending it out.
- Finalise the budget for the trip.
- Pay for the activities you have booked
- If possible, make a visit to the venue to look for toilets, places to eat, rest and park.
- Ensure cover has been arranged for staff supervising the visit

- Draw up a risk assessment for the trip, which should then be approved by the EVC
- Assess any special needs of the group and ensure that staffing levels and experience are appropriate to meet these needs
- Meet with staff supervising the trip to discuss plans.

*At least one week before the trip:*

- Ensure all parental consent forms have been received and are fully completed with medical and emergency contact information
- Ensure that the Head teacher is informed of the names of pupils, staff and other adults attending the trip.
- If appropriate, inform teachers and tutors of pupils who will be missing school to participate in the visit.
- Give information sheet with points of contact, a mobile phone number and times of departure and arrival to relevant members of senior management
- Compile a list of medical information about pupils attending the visit.
- Telephone activity centres, coach company and other organisations involved in the visit to confirm exact times and numbers
- Meet again with staff supervising the visit to finalise times, plans and the special needs of any pupils attending the visit.

*The day before the trip:*

- Photocopy itineraries, including a mobile phone number, to give to other group leaders.
- Compile a folder containing all the documentation for the trip, including emergency contact numbers, insurance documents, medical information and names of pupils attending.
- Make sure you have a first-aid kit appropriate to the nature and duration of the activities you will be undertaking

## PARENTAL CHECKLIST

This checklist is designed for use by the Group Leader to check that parents have been provided with all relevant information. Some activities that take place within school hours may not require attention to all sections.

ELEMENT	ACTION	TASK/DETAILS	√
Written Information	Head teacher approval?  Conditions stipulated by Head  Information sent to parents? Covering: Educational objective Clothing and equipment required Organisation of sub-groups Action in emergency Group conduct Information about site/working area Relevance to future/prior work  Follow-up information to be sent?  Parental consent/signatures received for all group members?	When?   What format? When?   What? When?  By what date? Any missing? Who chases?	
Medication	Members of the group identified as requiring medication?  Any further info required e.g. specific training in administration, emergency arrangements etc. req'd?	Details of individuals received and of what medication is required?  What?	
Staffing	What arrangements have been made?  Are staff appropriately qualified and experienced?  Written details of visit to staff involved?  Written details to Headteacher  Any problems identified?  Information given to parents?	What?  When?  When?  When?  What?  What, when and how?	
Discipline	Code of behaviour to parents and staff concerned?  Sanctions?	When?  What? When? How?	
Meetings	Parents' evening?  Arrangements to fully inform parents unable to make the above meeting?  Have handouts been given to all parents?	When?  What are they? Format?  By whom? How to check?	
Finance	Do all parents understand the financial commitments into which they are entering?	How verified?	

	<p>Is financial support available from elsewhere – if so has this been checked for the current activity?</p> <p>Have appropriate persons been informed of the above?</p> <p>When is the point of no return?</p> <p>Are there any hidden factors?</p> <p>What is the policy on pocket money?</p> <p>Who is responsible for safe keeping of pocket money?</p> <p>How is pocket money to be accessed?</p>	<p>When? By whom?</p> <p>By whom?</p> <p>When? By whom?</p>	
Insurance	<p>Have parents been informed of insurance cover – in particular for?</p> <p>Arrangements for cancellations Illness during visit Accident to group member during visit</p> <p>Is there any insurance for personal belongings taken on the visit in case of damage or loss?</p>	<p>What items insured if any?</p>	
Travel Company/ Commercial Centre	<p>Have parents been given information about the travel company/commercial centre</p> <p>The address of the activity Centre</p>	<p>Instructions not to phone except in an emergency</p>	
Contact person	<p>Have parents been informed of the name of the visit organiser who will be responsible for the group during the visit?</p> <p>Have parents been given the name of the emergency contact person back at base both during and after school hours?</p> <p>Have parents been given an out of hour's telephone number in the event of an emergency? This person/s to be available for the whole of the time the group are away.</p>	<p>Who?</p> <p>Who?</p> <p>Who?</p>	

<p>Religious &amp; cultural issues</p>	<p>Have any issues arisen which need to be addressed?</p> <p>Are there arrangements to ensure that religious and cultural beliefs and practices can be followed?</p> <p>Has this information been passed to parents?</p> <p>Are there any specific gender issues due to cultures and beliefs?</p> <p>Are accommodation facilities suitable for mixed groups?</p> <p>Are there issues regarding safety equipment such as the fitting of safety helmets or the fitting and checking of safety harnesses?</p> <p>Are there any emergency medical issues that need to be addressed?</p>	<p>What?</p> <p>What?</p> <p>When? By whom?</p> <p>What?</p>	
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**Additional Notes:**

**EVALUATION OF THE VISIT TO BE COMPLETED BY THE GROUP LEADER FOR FUTURE REFERENCE**

School/Youth Group:	
Group Leader:	
Number in Group:	Boys:          Girls:          Supervisors:
Date(s) of Visit:	
Purpose (s) of Visit:	
Venue:	
Commercial Organisation:	

Please comment on the following features:

	Rating out of 10	Comment
1. The Centre's pre-visit organisation:		
2. Travel arrangements:		
3. Content of education programme provided:		
4. Instruction:		
5. Equipment:		
6. Suitability of environment:		

	Rating out of 10	Comment
7. Accommodation		
8. Food		
9. Evening Activities		
10. Courier / representative		
11. Other comments and summary evaluation. Include here a comment regarding any "close calls" that did not result in injury or damage, however, but for the Grace of God . . . . . ?		

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

Group Leader's Full name: \_\_\_\_\_

To be retained by the school EVC.

Copy to the Outdoor Education Adviser for category B and C visits, or where a close call has occurred.