

The Kent Framework for Safe Practice on Educational Visits and Outdoor Learning Activities

This framework has been developed to support Kent schools and youth groups working with children and young people in planning and management of Educational Visits and Outdoor Learning activities.

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This document is based on the excellent Scottish Government 'Going Out There' guidance document and definitive Outdoor Education Advisors Panel (OEAP) National Guidance.

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Glossary of Terms

Activity - Any specific element within a Visit. This might be a particular activity (such as pond dipping) but could equally refer to a specific element of the Visit (such as travel or residence). Visits should be regarded as comprising a number of consecutive and interdependent activities.

Activity Leader - A member of the Visit Leadership Team who is responsible for the management, supervision and safe conduct of the group (or sub-group) taking part in a specific activity within a Visit. See definition of Visit Leader.

Emergency - An incident which overwhelms the coping mechanisms of the Visit Leadership Team and which requires the Establishment's Emergency Plan to be initiated. This may, perhaps, involve some communication with the Employer and support from it, but the Establishment takes control of the situation and is able to cope.

Emergency Contact - The person or people at the Establishment or Employer who can be contacted by the Visit Leadership Team at any time (day or night) during a Visit, and who has the competence to provide support and, if necessary, take initial charge of the situation until an Incident Controller takes over.

Emergency Procedures - A plan for actions to be taken by the Visit Leadership Team in the event of an Incident or Emergency. The plan should be based on a Risk Assessment. It should include procedures for alerting the Establishment's and the Employer's Emergency Contact in the event of an Emergency.

Employer - An organisation, which is responsible under the Health and Safety at Work etc Act 1974 for any of the Participants and Visit Leadership Team.

Establishment - The setting where children or young people are based, such as a school, youth centre or children's home.

Hazardous Environment - Any environment that in itself presents a significant physical risk; principal examples involve water, roads or the potential to fall from a height.

Head of Establishment - The Head of Establishment is responsible to their employer, and is the person with the immediate management responsibility for groups or individuals who are participating in a Visit.

Helper - An adult who has an agreed role during a Visit, but who is not a Visit Leader, Assistant Leader, Activity Leader or Participant. For example, a Helper might be: an inexperienced member of staff; a Parent; an apprentice, student or trainee; a carer. Any child or young person in a helping role should be regarded as a Participant.

Higher Risk Environment - Any activity with a risk of serious or long term harm to participants, which requires the activity leader to have specialist competence to manage it; often associated with Hazardous Environments.

Off-Site - The term describing any Visit or Activity taking place outside the physical boundaries of the organising Establishment.

Parent - Those parents, legal guardians or others who have parental responsibility for a Participant. If a Parent takes part in a Visit as a member of the leadership team, they will have another role within the supervision arrangements for the visit: care must be taken to ensure that the role of Parent does not conflict with this other role.

Participants - All members of the party who are not members of the Visit Leadership Team. As well as the children or young people from one or more Establishments; this might also include Parents or other adults (on a family outing, for example) or children of adults on the staff team.

Provider - Any third-party person or organisation contracted to organise and/or deliver a Visit or Activity, and/or supervision of Participants.

Ratios - The appropriate ratio of staff to pupils for a Visit is determined by the Risk Assessment.

Technical Expert - In the context of licensable adventure activities, this person is a highly qualified and experienced specialist who is responsible for providing specialist advice to providers on their safety management and staff competencies. (For more details, see *HSE publication L77* - www.hse.gov.uk/pubns/priced/l77.pdf).

Visit - The term that describes the entire period between departing from and returning to the Establishment or home setting, including time devoted to travel. The Visit will usually comprise a number of Activities.

Visit (or Activity) Leader - The Visit leader is responsible to the Head of Establishment and is the person with the main supervisory responsibility for leading participants in an off-site outdoor experience, educational visit or outdoor learning activity. They are responsible for the young people before, during and after the off-site activity. The Visit Leader is responsible for the detailed organisation of the excursion according to the policies and procedures of the employer. They will present their plans to the Head of Establishment for approval. They must also ensure that parents make informed decisions regarding attendance and should arrange for briefing sessions as required.

Visit Leadership Team - All the adults on a visit who share the responsibility for supervision, including the Visit Leader and any Assistant Leaders, Activity Leaders and Helpers. All should be well briefed by the Visit Leader to be clear about their roles and the task allocated to them.

Visit Assistant (e.g. parent helpers) - The Visit Assistant(s) carries out supervisory duties as instructed by the Visit leader. They are an adult with responsibility for supervising participants during the visit and also, where specified, may be delegated to deputise for the visit leader in an emergency situation.

Further information on terms and definitions can be found here -
<http://oeapng.info/downloads/download-info/1a-glossary-and-definitions/>

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1. Introduction

Outdoor Learning is widely recognised as an important tool for supporting the education and development of children and young people, providing direct curriculum-linked activities to improve learning, skills, understanding and activity opportunities to enhance PE and extra-curricular activities. It also provides a wide range of personal development opportunities to support the development of real-life skills, self-confidence and motivation.

“Learning outside the classroom contributed significantly to raising standards and improving pupils’ personal, social and emotional development.” Ofsted – Learning

Outside of the Classroom report

www.lotc.org.uk/wp-content/uploads/2010/12/Ofsted-Report-Oct-2008.pdf

Kent County Council fully supports and encourages schools and educational establishments to take part in high quality visits and activities, and use outdoor learning to enhance their teaching and curriculum.

Ensuring children and young people have regular access to outdoor learning opportunities provides invaluable learning experiences, along with helping them to develop life skills including decision making, problem-solving, communication and teamwork.

This framework, which provides user-friendly processes compliant with health and safety legislation, aims to increase opportunities for children and young people to access their learning through off-site educational visits and the outdoors, improving learning outcomes for all.

This guidance adopts a low bureaucracy, enabling approach to outdoor experiences and offsite visits, reflecting the step change in the approach to educational visits detailed in the HSE High Level Statement, ‘**School trips and outdoor learning activities: Tackling the health and safety myths**’ - www.hse.gov.uk/services/education/school-trips.pdf

The HSE statement makes clear that:

- The focus should be on how the real risks arising from such visits are managed rather than a focus on paperwork
- There is a need for a proportionate and sensible approach for planning and organising off-site activities
- Those managing visits should streamline the planning process and authorisation arrangements for visits that involve everyday risks
- HSE’s primary interest is real risks arising from serious breaches of the law. Any HSE accident investigation will be targeted at these issues

1.2 Incidents and Accidents

Accidents and mistakes may happen during visits and activities – but fear of prosecution has been blown out of proportion leading to a fear of taking children and young people off-site and outdoors.

HSE has made prosecutions in rare cases where there was evidence of recklessness or a clear failure to follow sensible precautions. However, it is important that employers and leaders do not interpret this as meaning that to avoid prosecution they must eliminate even the most trivial risks. Employers and leaders are expected to deal with risk responsibly and proportionately.

If an incident on a visit leads to the death or serious injury of someone, HSE will normally investigate. Most serious accidents on visits involve underlying management failures and HSE always looks for these underlying causes. HSE does not investigate incidents in response to civil claims.

If things do go wrong during a trip, provided sensible and proportionate steps have been taken, it is highly unlikely that there would be any breach of health and safety law involved, or that it would be in the public interest for HSE to bring a prosecution.

1.3 Remit and Definition

This Guidance applies to situations where adults, acting in the course of their employment take responsibility for children and young people taking part in offsite outdoor learning activities and visits, as well as when taking part in on-site outdoor activities.

The common element to the above is ‘being outdoors’, either on-site or off-site or on the journey to new environments, away from the usual indoor base.

The following terms are often used to capture this range of ventures, experiences and environments:

- **Off-Site Visits**
- **Outdoor Learning**
- **Outdoor Education**
- **Learning Outside the Classroom (LOtC)**
- **Educational Visits**

For the purposes of this guidance, we use the definition:

‘Any occasion when a young person takes part in a structured and employee-led learning activity which is carried out beyond the boundary of the normal operational base’.

The definition does **not** include:

- **where establishments operate on a split site**
- **work experience placements**

- **Physical Education (PE)**: only the journey to and from the venue is covered by this guidance. The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the employer and Association for Physical Education AfPE - <http://www.afpe.org.uk/>

1.4 Visit Categories

To support with the planning and management of the very wide range of activities and experiences that outdoor learning and educational visits encompass, this guidance categorises outdoor activities and visits as follows:

- **Routine and Expected** - regular activity as part of normal everyday practice in play and learning (including local off-site visits on foot, by private hire or public transport)
- **Day Visits** - locally or further afield
- **Residential Visits** - i.e. including an overnight stay)
- **Overseas Visits** - outside of the UK
- **Adventurous (or more Hazardous) Activities**

A particular activity or visit can involve several of the above categories, and could be undertaken as a one-off or regular/routine event.

1.5 Foundation Principles of the Guidance

Kent County Council has formally adopted the **Outdoor Education Advisor Panel (OEAP) 'National Guidance'** as the basis for its own employer guidance and the county-wide Kent Framework for Safe Practice on Educational Visits and Outdoor Learning Activities guidance.

OEAP National Guidance - <https://oeapng.info/>

Under the **Health and Safety at Work etc. Act (1974)** health and safety responsibilities lie with the employer, who has the legal responsibility to carry out the duties imposed by the Act. However, employers can delegate the tasks necessary to discharge these duties, even though the overall responsibility for health and safety remains with the employer.

This guidance builds on the foundation provided by earlier DfES publications:

- "Health and Safety of Pupils on Educational Visits "(HASPEV) (1998)
- "Health and Safety: Roles and Responsibilities" (2001)
- "Standards for LEAs in Overseeing Educational Visits" (2002)

These government publications have now been withdrawn and replaced with a more generic statement '**Health and Safety: Advice for Schools**' - available from DfE - www.gov.uk/government/publications/health-and-safety-advice-for-schools.

The **OEAP National Guidance** is considered as the primary source of advice on good practice for the planning and management of outdoor learning and educational visits and activities, and is used across England and Wales.

This guidance is also designed to intergrade with the OEAP accredited Educational Visit Coordinator (EVC) and Visit Leader (VL) training courses available to establishment staff, along with other local KCC training courses.

Other sources of guidance (e.g. those issued by government departments and professional associations) may be useful in reinforcing or clarifying understanding, however in terms of legal expectation the employer's guidance will prevail.

It is therefore of critical importance for those using this guidance to understand "**who is my employer**"? (See section - 3.1)

Where an employer contracts the provision of services to an external provider, it should require that the provider follows the employer's own guidance or operates guidance of a similar standard. This is most easily achieved if the employer adopts this National Guidance and requires the provider to do likewise.

1.6 Adopting this Framework

The framework has been developed to enable its widest possible adoption, integrating support for employers with planning and provision at local authority level and with management, delivery and practice at establishment level.

The framework is relevant to everyone who provides planned learning for children and young people in Kent, whether as part of early years, school, through social work services and colleges, community learning and development, outdoor learning, adventure and play organisations or the voluntary sector.

Adoption of the good practice exemplified in the framework allows employers to fulfil their responsibilities under the **Health and Safety at Work etc Act, 1974** for outdoor learning and off-site educational visits for all participants.

Further information available here - www.hse.gov.uk/legislation/hswa.htm

1.5 Further Support

To support employers, schools and groups working with children and young people KCC provides access to professional advice, guidance and support for the planning and management of outdoor learning and educational visits.

The **Outdoor Education Advisory Service** provides professional high quality advice, guidance and support for schools and groups in managing educational visits and activities, and in developing outdoor education and learning as a tool for learning and development.

Advisors are highly experienced outdoor educators and qualified teachers who can support schools with professional and practical advice with all aspects of managing educational visits, and in developing curriculum and personal development-linked outdoor learning activities.

Advisors are accredited members of the national Outdoor Education Advisors Panel (OEAP), and accredited trainers of the Educational Visit Coordinator (EVC) and Visit Leader (VL) training courses, as well as providing a wide range of other CPD training and support.

Outdoor Education Advisory Service and Support packages include –

- Direct access to experienced and qualified Outdoor Education Advisors available via phone, email and for meetings, site visits, etc.
- Advisors provide schools and establishments with professional technical advice and guidance in the safe practice of educational visits, adventurous and other outdoor learning activities helping employers to meet legal health and safety and nationally accepted good practice standards.
- Access to comprehensive, robust and tested policy and guidance information and documents to support both Maintained and Academy, Free and Independent schools in their management of educational visits and outdoor learning activities.
- Access to a flexible and powerful online visits management, approval and monitoring tool - EVOLVE Visits. This bespoke Kent-specific system links directly the Outdoor Education Advisory Service policies, procedures and visit approvals process – ensuring simple and effective communication between schools and Advisors.
- The EVOLVE system provides a powerful and easy to use tool for Headteachers and EVCs to use day to day to reduce the workload and administration of visit management. The system provides a comprehensive tool to evidence good planning and practice on educational visit and activities, covering all aspects of visit management from staffing to risk management in a single easy to use and accessible online tool, as well as features and tools for reporting on and evaluation of visits.
- The EVOLVE+ option provides further tools for reducing workload and administration allowing the system to directly link with school SIMs systems for automatic daily updates of staff, pupils and other information. Other features and tools include online visit consent, communications with parents, and options for schools to personalise approvals process to include staff such as finance and cover managers in the process.
- The EVOLVE system allows KCC as a Local Authority to provide much more effective support in the event of serious accidents and incidents, as well as direct 24/7 access to detailed visit information for school Governors and Academy Trust management.

- Access to a large maintained database of checked and 'vetted' educational visit and activity providers in Kent, the UK and abroad, ensuring that schools and employers only use educational providers that meet both national accepted and local Kent standards for educational provision. All adventurous activity and/or residential accommodation providers have been individually checked by experienced Advisors to ensure they hold national accreditation such as LOtC Quality Badge, Adventure Activities Licence (AALS) or have been checked by the Outdoor Education Unit to similar standards.
- Extensive CPD training opportunities for school staff covering a wide range of areas from visits management for senior staff as well as teachers and teaching assistants on the ground; adventurous activity skills development including teambuilding, orienteering and map work, camping and campfires; to the development of outdoor learning activities in the curriculum.
- Consultancy and site visits support with the development of school curriculums and school grounds for outdoor learning; maximising the benefits and minimising the costs.

Further information can be found here - www.kelsi.org.uk/Curriculum/outdoor-education and www.outdoorlearningkent.co.uk/

2. Effective Practice in Managing Outdoor Learning and Educational Visits Safely

2.1 Introduction

The ability and competence of front line staff to plan and manage a dynamic situation in a safe and appropriate way is the key contributor to safe and successful practice in the different levels of outdoor experience and off-site visits.

This is underpinned by:

- Employers supporting Heads of Establishment
- Heads of Establishment supporting, identifying and deploying staff with the right competences and experience for leading different levels of off-site visit
- Staff being given training and other opportunities to develop their knowledge, skills and confidence in planning, organising and leading outdoor experiences or off-site visits
- All staff having access to resources of relevant and competent technical advice

It is anticipated that employers should adopt the above set of principles as common and effective practice and should provide support for Heads of Establishment and technical advice as required by local circumstances. By taking this approach, employers will be using a straightforward and common framework which will reduce bureaucracy and satisfy the duties on them under health and safety legislation.

2.2 Employers Supporting Heads of Establishments

Employers have a clear duty to provide appropriate information, instruction and training to all their employees. Employers will monitor the effectiveness of their management and delivery of outdoor experiences and off-site visits. This should be a blend of systems-monitoring and on-the-ground monitoring.

Employers will also support their employees in the delivery of activities by ensuring that the identification and assessment of the risks involved in participating in any outdoor experience and / or off-site visit have been completed prior to participation. As part of this process the employer will also ensure that proportionate control measures are understood and implemented to deal with the risks identified.

This will be further supported by providing generic risk assessments for common outdoor and off-site activities and visits.

2.3 Helping Heads of Establishment to Support Visit Leaders

The employer's arrangements for planning, approval, monitoring, training and audit should support Heads of Establishment in assisting staff to lead outdoor experiences and off-site visits with increasing confidence and competence. Heads of Establishment should have ready access to their employer's policies and guidance and to specialist competent advice on visits, outdoor learning and excursions.

Supporting Heads of Establishment includes identifying and fulfilling their development needs in relation to:

- Clarifying their role in approval
- Identifying and deploying appropriate staff as Visit Leaders
- Managing the development of effective outdoor learning practice in their establishments, including risk education within the curriculum
- Increasing the range and level of outdoor experience and off-site visits offered as a normal part of everyday activity for all participants
- Monitoring the quality of outdoor experiences and off-site visits and the impact of various patterns of provision
- Enabling the development of staff knowledge, skills and confidence in planning, organising and leading outdoor experience or off-site visits
- Implementing appropriate safety management that weighs up both risks and benefits

2.4 Identifying and Deploying Staff

The Head of Establishment, who approves each visit, should match the demands of the different levels of off-site visit to the competencies and experience of individual staff who may be interested in participating in off-site visits.

For routine off-site visits in the local area or to local facilities no additional competencies over and above those of a competent professional working on-site should be required.

For residential visits, Heads of Establishment should decide who is competent to lead. However, staff may need experience of routine visits and of assisting with residential visits before acting as leader.

For overseas visits, Heads of Establishment should decide who is competent to lead. However, normally, staff will need experience of the above two types of visit and of assisting on an overseas visit before taking the leadership role.

For adventurous activities, the Head of Establishment should decide who is competent to lead. Staff should have competence in leading routine off-site visits. However, there may be a need for certain other defined competencies and skills for some adventurous activity visits. Advice on this must be sought from an appropriate technical expert.

The Head of Establishment will ensure appropriate management arrangements are in place prior to the visit.

2.5 Support and Development for Visit Leaders

The employer's arrangements for planning, approval, monitoring, training and audit should provide Visit Leaders with ready access to their employer's policies and guidance. This includes direct access to technical advice on visits and additional field monitoring assistance by a senior member of the establishment in some cases.

Arrangements should enable Visit Leaders to be clear about their role and to feel supported and confident in it. Where development needs are identified, these should be fulfilled.

A key area for development of professional skills and competence in working outdoors or off-site is the ability of Visit Leaders to make dynamic risk assessments that take account of changing circumstances and events and cause them to respond appropriately. Training in risk management and approaches to risk education, combined with developmental experience of planning, preparing for, and supervising visits should form part of professional learning opportunities for educators wishing to build capacity in this area.

This should include opportunities to consider the many benefits of outdoor learning and the contribution that high quality outdoor learning makes to attainment, achievement and well-being across the curriculum. Access to advice and support should also be available.

2.6 Access to Technical Advice

Employers must have access to technical advice on visit and activity safety matters. The adviser needs to have diverse experience of the range of outdoor activity and visit provision. They should be of sufficient authority to ensure that they can develop and take forward strategy, advice and guidance across all sectors and services.

The role of the adviser would normally involve:

- A good practical knowledge of the challenges encountered by groups in all venues or environments
- Assessing risks and identifying sources of advice
- Monitoring the visits including observing visits or arranging for this to be done by appropriate staff
- Reviewing policies and procedures in the light of lessons learned, and sharing good practice more widely
- Identifying training needs
- Being a source of expert advice on visits generally and on adventure activities, expeditions and overseas visits specifically

- Where necessary, seeking and obtaining the advice of other people with particular specialist knowledge, e.g. transport or insurance
- A good understanding of the relevant legal responsibilities around visits

2.7 Approval for Visits

Whilst the employer has health and safety responsibilities it would be normal practice to delegate approval of routine and simple visits to the Head of Establishment, with more complex or hazardous activities and visits also being approved by the employer.

Employers should provide clear guidance to Heads of Establishments and other staff on their own requirements for the approval of outdoor learning and off-site educational visits.

2.8 Planning for Emergencies

Employers must prepare and communicate emergency procedures for all off-site visits.

Emergency procedures are an essential part of planning a visit. Maintained schools and establishments should follow KCC guidance on emergency planning procedures. Academy, Free and Independent schools should have their own emergency planning arrangements based on their own employer's arrangements.

Heads of Establishment and Visit Leaders must ensure that they are familiar with the requirements of their employer's emergency procedures. Visit Leaders and Visit Assistants have a common law duty to act as a normal caring parent would. They should not hesitate to act in an emergency and to take life-saving action in an extreme situation.

3. Roles and Responsibilities

3.1 Introduction

Under the **Health and Safety at Work etc Act, 1974** employers are responsible for the health, safety and welfare at work of their employees. Employers are also under a duty to ensure, so far as is reasonably practicable, the health and safety of anyone else on the premises or anyone who may be affected by their activities. This includes participants in off-site visits.

Who is my employer?

- For community schools, community special schools, voluntary controlled schools, maintained nursery schools and pupil referral units, the employer is usually **the Local Authority**.
- For trust schools, city technology colleges, foundation schools, foundation special schools and voluntary aided schools, the employer is usually the **Governing Body**.
- For academies, the employer is usually the **Academy Trust**.
- For independent schools, the employer is usually the owner or the **board of directors or trustees**.
- For charities, the employer is the board of trustees.
- For companies, the employer is the board of directors.

3.2 Employer's Responsibilities

The employer has the following main roles:

- Provide this guidance, and other local employer guidelines, policies and procedures, to Heads of Establishment and Visit Leaders
- Provide access to outdoor education advisory support (and technical adventurous activity advice) as required
- Monitor proposals for certain categories of visit (e.g. visits or travel outside the UK, adventurous activities, etc)
- Have emergency procedures in place for dealing with major incidents / emergencies
- Ensure training needs have been addressed
- Provide access to named staff for advice, guidance and support
- Have appropriate insurance cover in place

- Have in place procedures to monitor and review off-site educational visits and outdoor learning activities

Employers must be clear about what happens when responsibilities and functions are delegated, especially the detailed requirements for notification and/or approval of visits and activities.

Provision of Guidance, Training and Access to Advice

An employer must ensure that its employees are provided with appropriate guidance, that there are training regimes in place to support it and that the guidance is understood.

KCC recommend the following training courses to supporting the safe planning and management of educational visits and outdoor learning:

- OEAP Educational Visit Coordinator (EVC) Training
- OEAP Visit Leader Training

An employer should provide suitable systems and processes to ensure that learning is updated and thus remains effective.

Further advice and access to information to support the training should be made available from appointed advisers or team of advisers. They should have proven expertise and professional understanding of the guidance, the training and current good practice.

Outdoor Education and Technical Advice and Support

It is strongly recommended that all employers appoint or retain the services of a competent and experienced outdoor education / learning and technical adviser to oversee all aspects of their provision of outdoor learning and off-site educational visits.

Employers carry full legal responsibility for the planning and management of all educational visits and outdoor learning activities. Choosing not to appoint a technical expert leaves them in a vulnerable position. In the event of any proven civil negligence, this can result in the payment of heavy damages. In the case of criminal negligence under the Health and Safety at Work etc Act (1974) or under Corporate Manslaughter legislation (2008), the ultimate sanction is a custodial sentence.

Where an employer chooses not to make such an appointment and instead shares the functions and responsibilities between a team of employees, all such employees should be specifically competent in the areas for which they take responsibility. There must be a clear audit trail that ensures responsibilities can be tracked and line-managed.

The effectiveness of the Adviser for Outdoor Education / Learning is key part of an employer's ability to carry out their responsibilities.

3.3 Heads of Establishment's Responsibilities

Heads of Establishment are expected to follow and implement this guidance, in conjunction with their own employer's policies and procedures, to ensure their responsibilities are fulfilled and that outdoor learning experiences and off-site educational visits can occur frequently and regularly and are managed safely. Heads of Establishment should ensure that the visit leader is competent to manage and monitor the risks throughout the visit.

Heads of Establishment should also ensure that:

- The visit has suitable aims and effective ways of achieving them
- Appropriate child protection procedures are in place
- An appropriate risk assessment has been completed and proportionate safety measures are in place
- The needs of the staff and participants, including training needs, have been considered
- Parents have been appropriately informed
- The visit leader has suitable experience and competencies for the visit
- Visit Leaders are allowed sufficient time to organise visits properly
- Visit Assistants and other accompanying adults in a supervisory role are appropriately recruited and briefed (See Section 4.12)
- The ratio of other accompanying adults to participants is appropriate (See Section 4.3)
- The employer has approved the visit, if appropriate
- Arrangements have been made for the medical needs and additional support needs of all the participants
- The employer's policy on the administration of medicines has been followed
- Adequate first aid provision will be available
- The mode of travel and travel arrangements are appropriate
- There is adequate and relevant insurance cover in place, if required
- Suitable contact arrangements are in place
- The emergency arrangements, if required, are in place and have been communicated to those who need to know
- There is a contingency plan, with clear lines of responsibility, which will cover incidents such as adverse weather, travel delays including a late return home.

3.4 Visit Leader's Responsibilities

Visit Leaders will consult with and seek advice and guidance from their employer and Head of Establishment with regard to up-to-date agreements about practice and procedure in off-site educational visits and outdoor learning activities.

Those in charge of participants have a common law duty to act as any reasonably prudent parent would and to do their best to ensure the health and safety of everyone in the group.

The Visit Leader has responsibility for:

- Having overall management responsibility during the visit - even if they are not physically supervising a part of the visit
- Preparing a Visit Plan (See Section 4.2)
- Obtaining approval of the Visit Plan from the Head of Establishment
- Following employer policies and guidelines
- Matching the off-site visit to the needs and abilities of all participants being mindful of equality and inclusion
- Obtaining sufficient information about participants to deal with any medical or behavioural needs
- Adequate first aid provision will be available
- Ensuring that any outside provider has relevant information about participants
- Appointing and briefing Visit Assistants, deputies and other adult supervisors where appropriate
- Being able to control, lead and instruct participants of the relevant age range
- Being trained in child protection issues

3.5 Visit Assistant's and Helpers Responsibilities

Visit Assistants and Helpers, including establishment staff, parents and carers supporting visits as well as volunteers working for service providers, have an important role in supporting and enabling outdoor learning experiences and off-site visits.

They can help with the running of an activity and be part of the supervision ratio where competent to do so. Often in adventurous activity settings Visit Leaders / assistants / helpers / volunteers need to be included in the operational ratios. Visit Assistants should be carefully selected and be briefed and prepared for their role (See section 4.12)

Visit Assistants and Helpers supervising participants must:

- Be made aware of the Visit Plan and any relevant risk assessments

- Understand how they can ensure the health and safety of everyone in the group
- Only be left in sole charge of participants where it has been previously agreed as part of the risk assessment
- Follow the instructions of the Visit Leader and help with control and discipline
- Inform the Visit Leader if concerned about the health or safety or welfare of participants at any time during the visit

3.6 Parents' Responsibilities

Parents should be able to make an informed decision on whether their child should participate in any visit and will need to:

- Provide the Visit Leader with emergency contact number(s)
- Give consent or inform the establishment if they decide to opt out
- If necessary, give the Visit Leader additional up to date information about their child's emotional, mental / psychological and physical health
- Prepare their child for the visit, especially when the establishment has identified the need for different clothing, rules and eating arrangements.

3.7 Participant's Responsibilities

In agreement with parents, the Visit Leader and the group, participants will:

- Not take unnecessary risks
- Follow the instructions of the Visit Leader, visit assistants and other supervisors including those at the venue
- Dress and behave sensibly and responsibly
- Be sensitive to local codes and customs
- Look out for anything that might hurt or threaten themselves or anyone in the group and tell the Visit Leader, Visit Assistant or venue supervisor about it
- Comply with the participants' Code of Conduct (where one exists)

Any participants whose behaviour may be considered to be inappropriate or a danger to themselves or to the group may be stopped from going on the visit or taking part in an activity. The aims of the visit for these participants should be fulfilled in other ways wherever possible.

4. Planning Visits

4.1 Introduction

Whatever type of visit is being undertaken - a trip to a local park, museum or swimming pool, or a residential stay in the UK or abroad - time given for preparation will ensure good planning, maximise the potential benefits of the experience and help minimise the risk from any incidents.

The planning and approval of visits should be proportional to the activity. More complex activities will require more planning, involve more people and take more time. Heads of Establishment must satisfy themselves that the person planning the visit is competent and has the necessary relevant experience or access to appropriate technical advice.

4.2 Preparing a Visit Plan

A **Visit Plan** needs to be in place for all off-site visits. The Visit Plan outlines who is to do what, and when. The amount of content and detail in the Visit Plan will be determined by the nature of the trip. It is sufficient for Routine and Expected visits to be covered by a Visit Plan which is reviewed on an annual basis.

The Visit Plan will, as well as keeping everyone safe, help to ensure a successful and meaningful visit by focussing on the benefits of the activities and clearly setting out the aims and objectives.

The Visit Plan can be thought of as being in three parts:

- Prior to the visit
- During the visit
- Following the visit

The Visit Plan will form the basis of the information required by the Head of Establishment for granting approval.

Examples of Visit Plans and what should be contained in them can be found within the toolkits for each type of visit.

4.3 Establishing Ratios

It is important to have a suitable ratio of adult supervisors to participants for any visit. The factors to take into consideration include:

- The participants, including Visit Assistants and Visit Leader (See Section 4.11)

- Previous experience (of participants and leaders)
- The venue
- The activity
- Getting there
- The time of year
- Medical and behavioural issues

Supervision ratios should be appropriate for the nature and aims of the visit, for the age and stage of the participants, and be agreed in the context of a risk assessment. The establishment of ratios is best determined through discussion between Heads of Establishment and Visit Leaders.

The Head of Establishment is ultimately responsible for ensuring and approving an appropriate ratio of adults, including Visit Leaders and Visit Assistants, to children and young people taking part. Specialist advice should be sought via the employer depending on the circumstances.

4.4 Communicating with Parents

The majority of off-site visits are a normal part of educational and other service provision (e.g. youth clubs) and are referred to within this guidance as 'Routine and Expected Visits'.

The aim of this guidance document is to keep the need for procedures to the minimum possible. When children join an establishment or group, parents should be informed about the range of activities that form part of the programme or curriculum. It should be explained that parents will be kept informed about the general plans for Routine and Expected visits, but that they will not necessarily be informed every time their child goes off-site.

Most establishments will have agreed with participants and parents the need for adequate outdoor clothing and footwear to be provided for all year round off-site activity as a normal part of everyday experience.

For any visit which cannot be classified as Routine and Expected, parents must have been appropriately informed, in order that they will know where participants will be, and have prepared them for the experience.

Further guidance on providing information to parents can be found within the relevant visit section.

4.5 Parental Consent and Medical Information

The majority of off-site visits are a normal part of educational and other service provision and within this guidance are referred to as 'Routine and Expected Visits'. For this category of visit

the process of gaining consent and informing parents should be kept as simple as possible and must not be restrictive. Recommendations for good practice can be found within Section 8 “Routine and Expected Visits”.

Visit specific parental consent is usually only requested for activities or visits that involve a higher level of safety management. These include:

- Residential visits
- Adventure activities
- Hazardous environments
- Visits abroad
- Remote supervision or unaccompanied visits

Recommendations for good practice can be found within the relevant visit section.

For Routine and Expected visits, and the majority of Day Visits, the medical information which has been obtained at the start of a school or youth group session (or other appropriate point) is sufficient. As part of this, parents should have been asked to agree to the participant receiving emergency treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities. Employers should have a standard form for use in establishments.

It is recommended that for more complex visits parents are asked to provide an update on any medical issues as part of the trip specific consent.

4.6 Preparing Participants

It is good practice to prepare participants so that they understand the aims and nature of the visit. Risk Education is an important aspect of young people’s development and participants should take part in planning, implementing and evaluating their own contribution to visits where possible.

Consideration should be given to ensuring that participants understand:

- The nature and demands of the visit
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times and not just during activities
- What to do in the event of an accident / incident
- Their role in ensuring the safety of all participants
- The Code of Conduct (if there is one)

4.7 Supervision

The Visit Leader has overall responsibility for supervision during an educational visit or activity. Breaks from this responsibility during the visit need to be clearly identified, with clear hand over arrangements, and co-ordinated by the Visit Leader. All adults who are in a supervisory role have a duty of care for the group at all times. There is no break from this responsibility during the trip.

There are numerous methods of supervising groups, but general consideration should be given to the following:

- Establishing rendezvous points
- Carrying out regular head counts
- Wearing easily identifiable clothing
- Having a buddy system
- Splitting large groups in to smaller groups with an identified leader

The risk assessment process should identify suitable levels and methods of supervision. Consideration should be given to keeping parents informed about the supervision arrangements.

There may be times during a visit where the participants come under the care of a third party (e.g. an outdoor activity instructor). In these circumstances, however, it must be realised that the Visit Leader still retains ultimate responsibility. If any concerns arise, the Visit Leader should discuss them directly with the third party in the first instance and then withdraw the group from the care of the third party if the problems are not resolved.

4.8 Remote Supervision

Remote supervision is the term used when the leader is not directly present with participants. Remote supervision comes in varying degrees and is used in a variety of circumstances. In its simplest form participants may be given time to look round a museum on their own: at the other end of the spectrum, young people may take part in expeditions (e.g. Duke of Edinburgh's Award scheme) where they have limited contact with their leaders for long periods of time.

Working without immediate supervision can help participants to develop independence and self-reliance. When such activity is planned the Visit Leader must be confident that participants have the appropriate skills to operate without undue risk. Training and briefing should reflect this.

Visit Leaders remain responsible for participants even when not in direct contact with them. They should not underestimate the challenges of remote supervision. It requires extra planning and contingencies to be put in place. This should be reflected in the Visit Plan.

4.9 Unaccompanied Visits

There may be occasions when young people take part in visits without any accompanying leader for the entire duration. Before such visits are considered, careful thought should be given to why this is deemed to be appropriate.

It may be considered that such a visit is appropriate in the following circumstances:

- It will benefit the participant's personal development
- It is part of a planned programme to reach an agreed outcome
- The proposed participants are of an age commensurate with the level of self-reliance required
- The proposed participants are assessed to have previously displayed appropriate behaviour
- The proposed participants have been fully briefed with regards to what to do in the event of delays, missed transport links, incidents or accidents etc.
- The proposed participants have been allocated a 24/7 emergency contact support person from the organising establishment
- The proposed participants have received skills training that is appropriate to the level of self-reliance required

4.10 Exploratory Pre-Visit

A Visit Leader needs to be confident that the location and facilities are suitable for their plans. In most cases this will involve a prior visit.

However, in consultation with the Head of Establishment, an experienced Visit Leader with good reasons to be confident in their own judgement may decide to use a location that has not been previously visited.

4.11 Gender of Accompanying Staff

With a mixed gender group it is preferable to have a gender mix of leaders. However there are many circumstances where this is not possible. Consideration of this issue should be part of the risk assessment process. Parents should be informed of and have given consent to the staffing arrangements.

Visit Leaders and Heads of Establishment should follow their own employer's policies relating to gender of staff of accompanying staff on educational visits and activities.

4.12 Vetting Accompanying Adults

Parent helpers and other volunteers are often an essential part of supervision ratios. When they assist on visits they are called “accompanying adults”.

The main decision that has to be made is whether an accompanying adult needs to be vetted.

The essential factor in this decision is whether the accompanying adult is taking part in ‘regulated activity as defined by the **Safeguarding Vulnerable Groups (SVG) Act 2006**.

Information about what is considered a regulated activity and guidance on the appropriate checking and vetting procedures can be found here -

www.gov.uk/government/uploads/system/uploads/attachment_data/file/550197/Regulated_activity_in_relation_to_children.pdf

If an accompanying adult is carrying out a regulated activity then they must be appropriately checked vetted.

Further information about the **Disclosure and Barring Service** and the checking and vetting process can be found here - www.gov.uk/government/organisations/disclosure-and-barring-service

Visit Leaders and Heads of Establishment should follow their own employer’s policies relating to the checking and vetting of accompanying adults on educational visits and activities.

4.13 Using an External Provider

When planning an off-site visit or activity, you should thoroughly research the suitability of the venue and check that facilities and third party provision will meet your group’s needs and expectations. This is an essential element of risk-benefit management and is critical in deciding how you will supervise the young people effectively.

Provider or Venue

A **provider** means any third-party person or organisation contracted to organise and/or deliver all or part of a Visit or Activity, and/or supervise Participants.

A **venue** means a publicly accessible place or resource, which will form part of a visit but where the Establishment Leadership Team will remain in charge and deliver any activities. For example: public transport providers, museums and galleries, theme parks, theatres.

Good communication with any external provider is essential to ensure that the visit matches expectations and runs according to plan. The following steps can assist with this process.

In the planning stage the Visit Leader should consider:

- Using a reputable provider that has specific experience of providing services for educational establishments and groups e.g. a provider who holds the LOtC Quality Badge

- Appropriate checks on providers who do not hold the LOtC Quality Badge, including that adequate insurance cover is in held (see Section 7) along with appropriate risk assessments and safety management systems (see Section 4.14). Technical advice should be sought for providers of adventurous or hazardous activities, overseas visits, etc.
- Liaising with the provider to discuss the aims and the needs of the group

Prior to the visit the Visit Leader should consider:

- Liaising with the provider in order to find out what is expected of them or their party (e.g. where to go, what to bring, etc.)
- Providing any relevant information to the provider such as the group's age-range, relevant medical conditions, additional support needs, competence
- Compliance with the employer's child protection policy

The Visit Leader retains ultimate responsibility for participants at all times during off-site visits, even when the group is under instruction by staff from the provider. Visit Leaders should remember that they are still expected to act as a normal caring parent, and must raise any concerns about the activity with any third party providers.

Additional information regarding providers of transport can be found in Section 6.

Additional information regarding providers of adventurous or more hazardous activities can be found in Section 12.

If using specialised service providers such as tour operators and expedition providers, Visit Leaders and Heads of Establishments must follow their own employer's policies and procedures for the use of these types of providers.

4.14 Researching and Checking Providers

When choosing a suitable provider the following questions should be considered:

- Do the values and ethos of the provider match your expectations?
- Is there a clear understanding about the responsibility for supervision at all times during the visit?
- What are the respective roles of provider staff and your staff?
- What provision will be made for any special needs?
- How flexible is the programme to meet changing circumstances?
- To what extent will you be able to involve the provider in evaluation of the visit's learning objectives?

You have a duty of care to ensure that any provider you use meets acceptable standards. This may be as simple as checking that the chosen provider(s) hold appropriate

accreditation. Where the provider has no external accreditation, or where your needs are not straightforward, checking the provider may involve further questioning and information gathering.

The easiest way to check that the quality and safety of most providers has been externally accredited for the provision of educational services is to look for the Learning Outside the Classroom (LOtC) Quality Badge.

The Learning Outside the Classroom (LOtC) Quality Badge

The Learning Outside the Classroom (LOtC) Quality Badge provides a national accreditation combining the essential elements of provision – learning and safety – into one easily recognisable and trusted Quality Badge for all types of Learning Outside the Classroom provider organisations.

KCC endorses the LOtC Quality Badge and recommends the use of Providers who have been awarded the LOtC Quality Badge.

KCC requests that schools, youth projects and all other educational establishments do not to seek information from LOtC Badged Providers that duplicates details provided by the Quality Badge Criteria; therefore there is no need to request copies of insurance, risk assessment or other information from LOtC Quality Badge holders.

For further details of the badge and to check a provider's accreditation status go to: <http://lotcqualitybadge.org.uk>.

Adventurous Activities

Where the visit involves certain adventure activities, within scope of the **Adventure Activities Licensing Regulations 2004**, then the provider is required by law to hold a licence from the **Adventure Activities Licensing Authority (AALA)**. For further details and to check a provider's licence details go to: www.hse.gov.uk/aala/.

When the provider holds a Quality Badge and/or an AALA licence (if required) there is normally no need to seek further assurances from the provider about the safety of provision. If the specific visit needs, or the needs of your group, are particularly complex; or if your employer or establishment wishes to use the visit as an audit tool to look closely at the visit management process; then further investigation of an accredited provider may be appropriate.

Other accreditation schemes may help to provide reassurances about aspects of a provider's provision and reduce the need for further research or questioning. For example: 'Adventuremark', AHOEC Gold Standard and National Governing Body (NGB) centre approval schemes.

If a provider does not hold a suitable accreditation which covers all aspects of their provision, then you must use other means of gaining assurances about relevant aspects of their operation including:

- Insurance

- Compliance with legal requirements
- Health, safety and emergency policies and procedures
- Use of vehicles
- Staff competence
- Safeguarding
- Accommodation
- Sub-contracting.

It is not necessary to look for such accreditation or assurances from venues and facilities that are open to the public and where no arrangements are made for them to provide activities, instruction, teaching or supervision. However, you still need to satisfy yourself about the suitability of such facilities for your group.

Researching Facilities and Venues

While the wide availability of websites, ease of communication and the LOtC Quality Badge scheme all have an important part to play in information gathering, there can be no substitute for a preliminary visit. This will back up research and enable you to clarify issues face to face. So, wherever reasonably practicable, it is good practice to carry out a preliminary visit to any unfamiliar facility or venue, including those used by a provider. The cost of this can be built into the pricing of the visit.

Preliminary visits enable the Visit Leader to address the following questions:

- Will the venue or facility be suitable to meet the planned aims and objectives of the visit?
- Are there any particular hazards or threats which need to be considered in your risk-benefit assessment and emergency procedures?
- What will be your options if the conditions of daylight, water level, temperature and weather, or under-foot conditions, differ significantly from the pre-visit?
- Do you have sufficient knowledge and understanding of the venue, facilities and activities to feel confident when planning the visit?
- Will the venue be able to cater for the full range of group needs, including any special needs? • Will the group need any specialist equipment?
- Are there any staff training needs?
- Will participants need to be prepared or trained?

It is sensible for a Visit Leader to take a camera on any preliminary visit, as photographs can be a great aid to briefing both the Visit Leadership Team and the Participants.

Where a preliminary visit is not reasonably practicable, you should consider how you will gather sufficient information to make an adequate assessment of the venue, facilities or provider. In the absence of first-hand observations and credible assurances as set out above, you should seek information from reliable sources such as:

- Your Employer's Outdoor Education Adviser
- Colleagues
- Similar groups that have recently visited the venue or used the facility/provider
- Reputable organisations such as tourist boards.

Risk Management Planning

Providers are responsible for assessing and managing the risks associated with their provision. They are not responsible for producing an overall visit risk management plan – this is the responsibility of the establishment/visit leader.

A provider's risk assessments are likely to be technical documents of no value to a visit leader (unless the visit leader is qualified to understand, assess and, if necessary, challenge them).

What is very useful for a Visit Leader is information that adds to their knowledge and understanding of the venue, facilities or activities and helps the visit leadership team to plan appropriate supervision for their particular group. For example:

- Are there any particular hazards or threats that need to be considered in the establishment's risk-benefit assessment and emergency procedures?
- What options are available if the conditions on the day don't allow for the planned activities?

Such information is better gained through a pre-visit or through dialogue with the provider, rather than through attempting to glean it from their risk assessment documents.

4.15 Inclusion

Where it is reasonably practicable all children should be able to access the opportunity to participate in off-site visits. Visit Leaders should be aware of, and follow their employer's equality and inclusion arrangements.

A school is less likely to discriminate if it plans a trip taking into account the need to include all pupils irrespective of their protected characteristics rather than if it arranges a trip and then tries to adapt it to make it inclusive.

In the early planning stages it is important to consider how accessible any trip is in terms of cost, venue, activities etc. Whilst it is not necessary for every participant to be able to take

part in every activity, it is necessary to make reasonable adjustments and consider alternatives to make the visit more inclusive.

In some circumstances, additional staff may be required to allow an individual to participate – this needs to be taken in to account in the early planning stages when considering staffing and costs and must not be an additional cost as a result of any individual choosing to participate.

4.16 First Aid

The **Health & Safety (First Aid) regulations 1981** state: “An employer shall provide or ensure that there are provided, such equipment and facilities as are adequate and appropriate in the circumstances for enabling first aid to be rendered to their employees if they are injured or become ill at work”.

This same principle should be applied to the children and young people in the care of an establishment. The provision of first aid during off-site visits and activities should therefore be considered as part of the risk-benefit assessment and planning process.

Establishments should already have in place a risk assessment which determines their first aid provision on site. Off-site provision should simply be an extension of this. The determination of the appropriate requirements should take into account:

- The nature of the activity
- The nature of the group
- The likely injuries associated with the activity
- The extent to which the group will be isolated from the support of the emergency services (both in terms of distance and response time).

Access to first aid should form part of the Visit Plan.

Qualified first-aiders may not be necessary for all off-site activities and visits if there is easy access to professional help and other adults who have been first aid trained. However, an appropriate level of first aid support must be available at all times.

This will require that one or more of the staff leading the activity:

- Has a working knowledge of simple first aid and is competent to use the first aid materials carried with the group
- Knows how to access, and is able to access, qualified first aid support.

For children in the **Early Years Foundation Stage (EYFS)**, there is a statutory requirement that at least one person who has a current paediatric first aid certificate and sufficient understanding and use of English to summon help in an emergency must accompany children on outings

A suitably stocked first aid kit should be taken on all visits.

All adults in the group should know how to contact the emergency services and have the means to carry it out. They should be aware of the limitations of mobile phones in remote locations and abroad.

Visit Leaders and Heads of Establishment must follow their own employer's policies and procedures on First Aid provision.

Further information on appropriate First Aid provision can be found here -

www.hse.gov.uk/firstaid/

www.hse.gov.uk/firstaid/faqs.htm#first-aid-box

www.gov.uk/government/publications/first-aid-in-schools

5. Risk Assessment

5.1 Introduction

It is important to have procedures that encourage participation.

Risk assessment should focus on real risks, rather than on those that are trivial or the result of overprotectiveness. Exposure to real risks should be offset against the benefits of undertaking the visit.

The risk assessment needs to be adequate and proportionate. It should only deal with significant and foreseeable risks. It does not require the use of technical formulae and professional health and safety expertise should only be needed in the more complex or specialist cases.

In simple terms, the law requires those responsible to take reasonable steps to ensure the risks are at an acceptable level. There is no legal requirement to eliminate or minimise risk. The key task is to carry out a 'suitable and sufficient risk assessment', and to act on its findings. What counts as 'suitable and sufficient' – for instance, the type of risk assessment, the level of detail and whether or not it is written down – depends on the circumstances of the visit or activity.

However, what is expected is a proportionate approach. The HSE makes it clear that health and safety is not about generating excessive paperwork.

Risk Benefit Analysis

Risk management, in the context of outdoor learning and off-site visits, is a two stage process:

1. The identification of the potential benefits to be gained from an activity, along with any risks to the health and safety of those involved.
2. The implementation of a plan to best realise these benefits, using professional judgement to ensure that the level of risk does not exceed that which can be justified by the benefits. Most human activity involves balancing benefits and risks. We cannot have all of the benefits but none of the risks. We can eliminate all of the risk only by stopping the activity - but we then lose all of the benefits.

This is recognised by both the Health and Safety Executive (HSE) and the Department for Education (DfE):

“HSE fully recognises that learning outside the classroom helps to bring the curriculum to life – it provides deeper subject learning and increases self-confidence. It also helps pupils develop their risk awareness and prepares them for their future working lives. Striking the right balance between protecting pupils from risk and allowing them to learn from school trips has been a challenge for many schools, but getting this balance right is essential for realising all these benefits in practice”.

- School trips and outdoor learning activities: Tackling the health and safety myths, HSE.

“School employers should always take a common sense and proportionate approach, remembering that in schools risk assessment and risk management are tools to enable children to undertake activities safely, and not prevent activities from taking place. Sensible risk management cannot remove risk altogether but it should avoid needless or unhelpful paperwork”.

- The Department for Education’s advice on Health and Safety for Schools updated February 2014.

Further information on **Risk-Benefit Analysis** as part of planning for overall risk management strategies can be found here -

<http://www.englishoutdoorcouncil.org/wp-content/uploads/Nothing-Ventured.pdf>

https://outdoorclassroomday.org.uk/wp-content/uploads/sites/2/2016/06/160606_PROJECTDIRT_ECD_BOOK7_A4-1.pdf

<http://www.hse.gov.uk/education/>

<http://www.hse.gov.uk/services/education/sensible-leadership/>

5.2 Preparing Risk Assessments

The employer has a legal responsibility to ensure proportionate and ‘suitable and sufficient’ risk assessments are in place for off-site educational visits and activities and to have a system that ensures these are being implemented. It is appropriate for the employer to provide generic risk assessments and these could be incorporated into an online recording tool where these are being used. This task may be assigned to an appropriately competent person.

The key element of any risk assessment is that it is made specific to the particular circumstances and participants of the visit or activity.

Generic risk assessments provide an overview of the foreseeable risks that might be met on a visit with the aim of managing risks so that they are acceptable. In general ‘acceptable’ would be free from significant risk of death or permanently disabling injury – further information can be found here - <http://www.hse.gov.uk/risk/controlling-risks.htm>

Leaders should use a generic risk assessment as a starting point, and add any significant and foreseeable risks specific to their visit. This should take in to account:

- The aims and benefits of the visit
- The participants (including leaders and helpers)
- The venue
- The activity
- Getting there

- Time of year

Routine and Expected Visits are normally by their nature low risk activities and should be quick and easy to risk assess. More hazardous or higher risk activities require more detailed risk assessments which record how the risks will be reduced to an acceptable level.

The findings of the risk assessment and the relevant precautions / controls, should be agreed with and understood by all participants including Visit Assistants (and parents where appropriate).

5.3 Dynamic Risk Assessment

Despite the best planning, the unexpected may happen during a visit and Visit Leaders have to be prepared to change and adapt as required. Experience and training will enable sound judgements to be made.

The Visit Leader and Visit Assistants should monitor the risks throughout the visit and take appropriate action as necessary. This is called dynamic risk assessment and includes knowing when and how to apply contingency plans where they are needed. It also includes heeding advice and warnings from those with specialist expertise or local knowledge (especially with regard to higher-risk activities).

The actions taken as a result of dynamic risks assessment may be recorded after the visit so that they can inform future planning.

5.4 Using an External Provider

All external providers must have risk assessments in place. Depending on the nature of the visit and activities to be undertaken the Visit Leader needs to consider whether they need sight of these. Technical Risk Assessments should be assessed by someone with the appropriate technical knowledge of the activity e.g. an Outdoor Education Advisor or Technical Expert.

Checks and Vetting of Providers Risk Assessments

By using a providers who holds the LOtC Quality Badge (or has been checked and vetted by the Outdoor Education Advisory Service), risk assessments and safety management systems have been assessed by competent technical expert as safe and appropriate for the activity or service provision. Therefore Visit Leaders do not need to request copies of risk assessments and other safety management systems from providers that hold the LOtC Quality Badge (or have been vetted by the Outdoor Education Advisory Service).

There is also no need for Visit Leaders to request copies of risk assessments from external providers such as museums, art galleries, etc where there is normal public access. However

it would be prudent to discuss safety arrangements and precautions with the provider for activities or venues of a less routine nature.

It is not necessary to ask for risk assessments from transport providers.

6. Transport

6.1 Introduction

The Visit Leader must give careful thought to planning transport. It is important to ensure that the travel plan is suitable for the age and nature of the participants. Consideration should be given to the following:

- The length, nature and complexity of the journey and implications for supervision etc.
- Selecting the right mode(s) of transport including use of public transport
- Using a reputable transport provider
- Contingency plans
- The time of year and weather
- The needs of any participants with limited mobility

Service providers such as transport operators are all subject to regulation and inspection and Visit Leaders can use them in the same way as any member of the public. There is no requirement to obtain risk assessments from transport providers.

6.2 Supervision on Transport

The Visit Leader is responsible for the party at all times including maintaining good discipline whilst travelling, and during any more remotely supervised periods (e.g. motorway services, ferries etc.). The level of supervision that is necessary should be considered as part of the risk assessment, taking in to account:

- The age and nature of the participants
- The mode of transport and the implications for supervising participants
- The length, nature and complexity of the journey

When planning transport, consideration should be given to the following:

- Preparing participants for the journey
- The comfort and safety of participants

The driver should not normally be responsible for supervision. Driver supervision may be sufficient if a small number of participants are being taken on a short journey.

6.3 Hiring Coaches and Buses

Visit Leaders should consult their employer's guidance for any specific procedures.

Coaches and buses should be hired from a reputable company. Professional operators of buses and coaches are legally required to be licensed. Compliance with the various legal requirements is their responsibility not the hirer's.

When planning a long journey Visit Leaders should ensure they agree a plan in advance with the company, for driver hours and rest periods.

Visit Leaders are responsible for immediately raising any concerns over driver behaviour (speeding, tiredness, aggressive driving, attitude etc.). If there is no satisfactory resolution consideration has to be given to stopping the journey.

6.4 Licences and Permits for Driving Minibuses

Visit Leaders should refer to their employer's policy and follow their own employer's requirements regarding minibus driving.

A minibus is a motor vehicle with between 9 and 16 passenger seats. It is described as a category D1 vehicle by the Driving Vehicle Licencing Authority.

Drivers of any vehicle must ensure that they have the correct entitlement on their licence.

The law on driver licensing no longer permits car drivers who pass their test after 1 January 1997 to drive vehicles with more than 8 passenger seats without passing a Passenger Carrying Vehicle (PCV) driving test. Further information can be found here -

http://www.direct.gov.uk/en/Motoring/DriverLicensing/WhatCanYouDriveAndYourObligations/DG_40_22619

Some employers allow educational and youth based establishments to apply for a section 19 permit.

This permit allows drivers who passed their test after 1997 to drive a minibus under the following conditions:

- The driver must be 21 or over
- The driver must have held a category B (car) licence for at least 2 years
- The driver receives no payment or consideration for driving the vehicle other than out-of-pocket expenses
- The minibus has a Maximum Authorised Mass (MAM) not exceeding 3.5 tonnes (4.25 tonnes including any specialised equipment for the carriage of disabled passengers)
- Trailers are not towed.
- The minibus is only driven in the UK.

- Further information can be found here - https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/494266/Driving_school_minibuses_and_advice_for_schools_and_local_authorities.pdf

The driver must have the D1 category on their licence for minibuses that have a MAM of over 3.5 tonnes.

6.5 Establishment Minibus

The minibus should be properly maintained in accordance with the employer's arrangements.

Although the Head of Establishment is ultimately responsible for the establishment's minibus, the driver is responsible for the vehicle when driving it. The minibus driver must be qualified to drive a minibus and have a valid driving licence (see Section 6.4).

It is advisable for all those who may drive the establishment minibus to receive training in minibus driving and the management of passengers such as that provided under the Minibus Driver Awareness Scheme (MIDAS). Further information can be found here - <http://www.ctauk.org/training/midas.aspx>

The driver should not normally be responsible for supervision of passengers. Driver supervision may be sufficient if a small number of participants are being taken on a short journey.

6.6 Private Cars

Visit Leaders and others who drive participants in their own car must ensure their passengers' safety in line with legal requirements. This includes:

- Ensuring that front and back passengers wear properly adjusted seat belts
- Having appropriate seating in place for children (including booster seating and seatbelt adjustment devices).
- Ensuring that the vehicle is roadworthy and has a valid MOT
- Ensuring that there is appropriate insurance cover for carrying the participants. This will require cover for business purposes e.g. B1 class insurance; Heads of Establishment should check this is in place.

Anybody using their own car to transport participants should be carefully selected, and vetted if appropriate, by the Head of Establishment.

If using private cars to transport participants it is essential that parents are informed of the arrangements, to enable them to make an informed decision.

When using private cars, it is advisable that the driver is not put in a position where they are alone with a participant. The Visit Leader should arrange a central dropping point for all participants rather than individual home drops.

7. Insurance

7.1 Introduction

The employer should make clear to Heads of Establishments and Visit Leaders the extent of their insurance provision for off-site educational visits and outdoor learning activities.

The Visit Leader must ensure, well before the group departs, that adequate insurance arrangements are in place covering all planned activities.

It is important to consult your employer to establish the level of insurance cover that is provided by your employer's insurer. This may come in varying levels:

- Some have insurance cover for all participants for all off-site visits
- Some provide cover only for specific activities
- Some provide no cover

7.2 Using an External Provider

If an off-site trip involves an external provider (e.g. outdoor activity provider, residential centre), the Visit Leader should establish the level of insurance provided by their own employer in order to determine whether additional insurance is required.

Service providers such as transport operators are all subject to regulation and inspection and Visit Leaders can use them in the same way any member of the public would without the need to check insurance.

The Visit Leader should consult their employer to confirm requirements.

7.3 Using a Travel Company

If your off-site educational visit or activity involves a travel company, the Visit Leader should establish the level of insurance provided by their own employer in order to determine whether additional insurance is required.

If the employer provides adequate cover, the Visit Leader will not need to obtain additional insurance through the travel company.

If additional cover is required the travel company will be able to advise on insurance requirements. However, the following are examples of points to consider when arranging insurance:

- Are there any exclusions?

- Is liability cover provided?
- Is personal accident cover provided?
- Is cover for personal belongings provided?
- Is there cover for damage to / loss of hired equipment?
- Is there any excess? (The first part of a claim which is not covered – who would pay this?)

The Visit Leader should consult their employer to confirm requirements.

7.4 Information for Parents

Parents should be given details of insurance cover.

For Routine and Expected Visits this can be done on an annual basis through the school handbook. For other categories of visits, details of the level of insurance cover should be included in the visit specific information provided to parents.

Parents need to be advised about any specific additional cover they may want to arrange such as loss of personal belongings.

8. Routine and Expected Visits

8.1 Introduction

The UK Government have recognised the need for young people to be regularly involved in outdoor activity and learning. This will involve establishments taking young people off-site.

Many of these off-site visits and activities will be routine, and will become an accepted and expected part of the curriculum. Within this guidance, these types of visits have been termed 'Routine and Expected Visits' and establishments should ensure that the process for running them is simple.

Routine and Expected Visits will generally be to local venues, involve easily managed activities, happen on a regular basis and be completed within the normal session times.

8.2 Approval

Approval for Routine and Expected Visits is normally the responsibility of the Head of Establishment.

NB: Heads and of Establishments and visit leaders must follow their own employers guidance on the approval of off-site educational visit and activities.

8.3 Visit Plans

There should be a collaborative approach within establishments to develop Visit Plans for the range of venues likely to be used on a regular basis.

Heads of Establishment should work with staff to develop an agreed approach to travelling on foot, to crossing roads or in the use of transport in their locality. Models of effective practice should also be developed and agreed for responding to local conditions and events. Approaches to risk education for children and young people should also be developed.

These plans should be reviewed regularly and adapted if required. They should be considered as working documents that are influenced by any incidents or lessons that have been learned.

8.4 Risk Assessment

Heads of Establishment should work with staff to develop risk assessments for the range of venues likely to be used on a regular basis. Routine and Expected visits are by their nature low risk activities and should be quick and easy to risk assess adopting a common sense approach.

Risk assessments should be reviewed on a regular basis.

Routine and Expected Visits might include venues such as museums and swimming pools. Such external providers are required to carry out a risk assessment of their own premises and activities. They must then implement appropriate measures to ensure that their activities are safe. There is no need for Visit Leaders to request copies of these risk assessments.

8.5 Information for Parents / Parental Consent

When children join an establishment or group, parents should be informed about the range of activities that are part of the programme or curriculum. Parents should be advised that they will be informed about the general plans for Routine and Expected Visits, but that they will not necessarily be told every time their child goes off-site. Establishments should explain this to parents as part of the induction in to the establishment.

Participants and parents should be informed about the need for adequate outdoor clothing and footwear to be available throughout the year to enable Routine and Expected Visits to become a normal part of everyday experience.

It is recommended that consent for Routine and Expected Visits should be gained at on a termly or annual basis.

If a visit requires any specific arrangements then parents should be informed.

8.6 First Aid

Heads of Establishment should work with staff to agree the level of first aid provision that is required for a Routine an Expected Visit. The following factors should be considered;

- How quickly medical care can be accessed
- Any known medical needs

Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider. By contrast, if the risk assessment indicates a raised or high level of risk it will necessary for one or more of the accompanying staff to hold a first aid certificate.

9. One-off Day Visits

9.1 Introduction

Visits which are a one-off experience or which are not 'Routine and Expected' (see Section 8) require additional planning considerations.

One-off Day Visits might include an annual trip to a visitor attraction, attending an event, etc. and are more likely to extend beyond the normal session time.

9.2 Approval

Approval for One-off Day Visits is normally the responsibility of the Head of Establishment.

NB: Heads and of Establishments and Visit Leaders must follow their own employers guidance on the approval of off-site educational visit and activities.

9.3 Visit Plans

The Visit Leader is responsible for completing a Visit Plan for a One-off Day Visit.

The Visit Plan should outline who is to do what, and when. The amount of content and detail in the Visit Plan will be determined by the nature of the trip. The Visit Plan will, as well as keeping everyone safe, help to ensure a successful and meaningful visit by clearly setting out the aims, objectives and benefits of the activities.

9.4 Risk Assessment

It is the responsibility of the Visit Leader to prepare a specific risk assessment for a One-off Day Visit.

Visit Leaders are responsible for recording significant and foreseeable risks specific to their visit. This should take in to account:

- The participants (including leaders and helpers)
- The venue
- The activity
- Getting there
- Time of year

The findings of the risk assessment and the relevant precautions / controls, should be agreed with and understood by all participants including Visit Assistants (and parents where appropriate).

A One-off Day Visit is likely to involve going to visitor attractions such as museums, zoos, etc. Such external providers are required to carry out a risk assessment of their own premises and activities. They must then implement appropriate measures to ensure that their activities are safe. There is no need for Visit Leaders to request copies of these risk assessments.

9.5 Information for Parents / Parental Consent

For One-off Day Visits specific information has to be provided to parents and should include:

- The aims and benefits
- The activity and its learning objectives
- The venue
- Travel arrangements
- Insurance cover
- Supervision arrangements

It is recommended that parental consent for the majority of off-site visits is gained on a termly or annually. This can include One-off Day Visits.

The exceptions to this are One-off Day Visits that include adventure activities or visits to hazardous environments (see Section 13). On these occasions it is recommended that specific trip parental consent be obtained. This can also include a request for up to date medical information which may have an impact on the visit.

9.6 Emergency Details

Visit Leaders should ensure that they carry the following up-to-date information for all participants on the visit (including accompanying adults):

- Relevant medical information
- Emergency contact details
- Any other information relevant to the specific visit

This can be obtained from the termly/annually updated information provided to schools.

For One-off Day Visits which include outdoor activities or venues with specific considerations it may be appropriate to ask parents for up to date information which may have an impact on the visit (e.g. fear of heights, allergies to animals, water confidence, etc.).

9.7 First Aid and Medical Facilities

Heads of Establishment and Visit Leaders need to take the following factors into account when deciding the level of first aid provision that is required on a One-off Day Visit:

- The type of medical facilities that are available
- How quickly medical care can be accessed
- The aims and objectives of the visit
- The age of the participants
- Any known medical needs

Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider among the accompanying staff. By contrast, if the risk assessment indicates a raised or high level of risk it will necessary for one or more of the accompanying staff to hold a first aid certificate.

It should be noted that there are different levels of first aid training and qualification. Visit Leaders should consult their employer to establish the level of first aid requirement. This is particularly relevant for higher risk activities.

10. Residential Visits

10.1 Introduction

A residential experience can be an extremely valuable learning opportunity and should be part of the progressive outdoor learning experiences provided for young people.

Residential Visits include any form of overnight stay regardless of the type of accommodation.

Current research from the **Learning Away** project shows the huge benefits and value of high quality residential visits and experiences, particularly around improving learning outcomes and motivation for children and young people.

The website also has real case studies and examples from schools and groups in how they have planned different types of residential experiences to meet different aims and outcomes and differentiated for different needs, along with training and support materials in helping to plan and organise residential experiences.

Information can be found here - <http://learningaway.org.uk/>

10.2 Approval

Residential Visits would normally be approved by the Head of Establishment before notification to the employer.

NB: Heads of Establishments and Visit Leaders must follow their own employers guidance on the approval of off-site educational visit and activities.

10.3 Visit Plans

The Visit Leader is responsible for completing a **Visit Plan** for a Residential Visit.

The Visit Plan should outline who is to do what, and when. The amount of content and detail in the Visit Plan will be determined by the nature of the trip. The Visit Plan will, as well as keeping everyone safe, help to ensure a successful and meaningful visit by clearly setting out the aims, objectives and benefits of the activities.

10.4 Risk Assessment

It is the responsibility of the Visit Leader to prepare a **specific risk assessment** for a Residential Visit, looking at the needs of the children and young people, and their supervision and safeguarding in the accommodation.

A residential establishment (e.g. hotel, hostel, etc) is required to have risk assessments in place for their own premises. There is no need for Visit Leaders to request copies of these risk assessments.

It is vital that risk assessments are made specific to the group and their needs, including pastoral, behavioural and medical needs.

Visit Leaders are responsible for recording significant and foreseeable risks specific to their visit. This should take in to account:

- The participants (including leaders and helpers)
- The venue
- The accommodation (in terms of how it affects the group)
- The activity
- Getting there
- Time of year

The findings of the risk assessment and the relevant precautions / controls, should be agreed and understood by all participants including Visit Assistants (and parents where appropriate).

As part of the risk assessment careful consideration has to be given to establishing **staff: participant supervision ratios**. Various factors could affect the ratios during a visit such as staff or participant illness, or the need to provide 1:1 supervision. It is the responsibility of the Head of Establishment and Visit Leader to ensure that adequate levels of supervision can be maintained in these circumstances.

10.5 Supervision

Residential Visits entail **additional requirements for supervision**. Consideration has to be given to the following:

- Establishing supervision ratios (taking in to account the need to provide 24 hour responsibility)
- Gender of the accompanying staff
- Vetting accompanying adults
- Periods of remote supervision

Further information can be found on these points in Section 4.

Supervision during a Residential Visit will require a range of supervisory techniques. Heads of Establishment should ensure Visit Leaders have sufficient knowledge and experience to carry out the very varied role that Residential Visits demand.

The Visit Leader and accompanying staff should allow sufficient time in the planning stage to discuss the supervision arrangements. Consideration should be given to a supervision rota, with identified hand-over arrangements, to ensure that it is clear at all times who has supervisory responsibility. This should be co-ordinated by the Visit Leader.

10.6 Information for Parents

For Residential Visits **specific information has to be provided in writing to parents** and should include:

- The activities and the learning objectives
- The venue
- Domestic and sleeping arrangements
- Medical provision
- Supervision arrangements
- Travel arrangements
- Insurance cover
- Behaviour code

In addition to written information Heads of Establishment and Visit Leaders should consider holding a meeting where these points can be discussed. The nature of the visit, the age and experience of the participants and the length of visit will affect this decision.

Communication with parents should include making them aware of procedures for dealing with misbehaviour or behaviour that gives Visit Leaders cause for concern.

10.7 Parental Consent

Parental consent has to be obtained for a Residential Visit. Detailed information has to be provided regarding the visit (see Section 10.5) to enable parents to give informed consent.

As part of the consent form parents should be made aware of, and agree to, the procedures for dealing with misbehaviour.

In addition up-to-date emergency information should be requested (see Section 10.10).

10.8 Preparing Participants

It is particularly important for a Residential Visit to ensure that participants are adequately prepared. Sufficient time should be given to enable participants to be informed and hold discussion about:

- The aims and benefits of the visit
- The nature and demands of the visit
- The domestic and sleeping arrangements
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times and the subsequent sanctions
- What to do in the event of an accident/incident
- The individual's role in ensuring the safety of all participants; if for any reason a participant has to return home early participants, parents and accompanying staff should agree in advance how this will be carried out and who will meet the cost.

10.9 Points to Consider about Accommodation

In the planning stage the Visit Leader should consider whether the accommodation:

- Fits with the aims and objectives of the visit
- Suits the needs and requirements of all participants (including disabled access)
- Is suitable for the gender mix of the group
- Provides adequate security and privacy for all participants
- Complies with appropriate safety standards for the nature of the visit

Prior to the visit the Visit Leader should if possible / appropriate:

- Make a prior visit
- Obtain a floor plan showing the location of the group's rooms. Ideally the rooms should be close together with the leaders' quarters located to enable adequate supervision
- Allocate rooms to participants

On arrival the Visit Leader should:

- Carry out a fire drill as soon as possible to ensure all participants are aware of the lay-out of the accommodation and its fire precautions/exits

- Check the accommodation to ensure it is safe and fit for purpose
- Check for any potential hazards (balconies, electrical connections, access to other rooms etc.) and if necessary establish control measures to deal with these. Where the hazards are extreme or cannot be managed adequately consideration has to be given to insisting on alternative accommodation
- Ensure all participants are aware of the system to ensure their overnight security
- Ensure participants are aware how to obtain assistance if required during the night

10.10 Emergency Details

On a Residential Visit it is important that the Visit Leader has **adequate knowledge and information about participants** to ensure their well-being. Parents should be given the opportunity to pass on relevant information on the consent form and by more informal approaches.

The Visit Leader should ensure that they carry up-to-date information for all participants (including accompanying adults) on the following:

- Relevant medical information
- Emergency contact details
- Any other information relevant to the specific visit

It is essential that this information is shared with accompanying adults, and external providers, where appropriate. For Residential Visits which include outdoor activities or venues with specific considerations it may be appropriate to ask parents for information which may have an impact on the visit (e.g. fear of heights, allergies to animals etc.).

10.11 First Aid and Medical Facilities

The aims and objectives of the visit can influence the degree of risk that parents and participants will find acceptable. For example parents of a primary aged pupil going on a Residential Visit could reasonably expect similar access to medical care as their child would have at home. By contrast, the parents of an older child taking part in an unaccompanied walking expedition in a remote area would accept that access to medical care is limited.

When considering the location of a Residential Visit it is an important part of the risk assessment to consider:

- The type of medical facilities available
- How quickly medical care can be accessed
- The aims and objectives of the visit

- The age of the participants
- Any known medical needs

Heads of Establishment and Visit Leaders need to take these factors into account when deciding the level of first aid provision that is required. Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider among the accompanying staff. By contrast, if the risk assessment indicates a raised or high level of risk it will necessary for one or more of the accompanying staff to hold a first aid certificate.

It should be noted that there are different levels of first aid training and qualification. Visit Leaders should consult their employer to establish the level of first aid requirement. This is particularly relevant for higher risk activities.

11. Overseas Visits

11.1 Introduction

Overseas visits include all visits outside the UK. They may involve a day visit, or include a residential element, and are likely to involve other activities which are of a sporting, cultural, or adventurous nature.

Visiting other countries is one of the best ways of gaining a fuller understanding of one's place in the world, and offers a chance to explore the culture, challenges and opportunities that exist away from these shores.

Overseas visits should be seen as a progression after learning about our own local environment, Kent and other local areas, and the UK. The key benefits of educational visits to other countries are more likely to be achieved by connecting the experience to the child or young person's learning, through links to the school curriculum or youth programme.

Each visit overseas will require careful planning, realistic budgeting, and a thorough appreciation of the self-reliance and judgment needed when operating out with the UK. Therefore it is likely that leaders will have had considerable experience of organising visits within the UK before leading visits overseas, especially to developing countries. Advice from Employers should be sought regarding local arrangements.

The standard of Health and Safety applying to Overseas Visits, regardless of location, activity or event, should strive to reflect that of the UK wherever possible. Where it is not possible to guarantee parity of standards, such as fire safety in accommodation, every effort should be made to mitigate or manage the exposure to risk. Parents and participants should be informed about any differences in standards that are anticipated.

The dangers of disease, civil unrest and terrorism can be checked out early on in the planning process through the Foreign and Commonwealth Office (FCO) Travel Advice website - www.gov.uk/foreign-travel-advice. However, there are constant changes to the levels of risk and the countries and areas they relate to, so this is something that needs to be revisited regularly prior to departure.

11.2 Approval

Prior consent in principle from the Head of Establishment, and Employer if appropriate, should be obtained prior to making any commitment to young people, parents or third parties. This will require both the Head of Establishment and the Employer to be satisfied that all necessary planning and preparation are in place before approving the visit.

NB: Overseas Visits must comply with the Employer's policy regarding taking young people outside the UK and advice should be sought in the early planning stage.

11.3 Visit Plans

Comprehensive planning and preparation is the most important aspect in ensuring a successful visit. The Visit Leader is responsible for compiling a Visit Plan which documents all aspects of the trip – the amount of detail will be determined by the nature of the trip.

The early planning process should consider the following:

Purpose

The Visit Plan should outline the aims, objectives and benefits of the visit and provide evidence that the purpose of the visit is compatible with the competences of the Leadership Team and the age and experience of participants.

Using a tour operator

If a tour operator or specialist provider is being used, it is important that they have the appropriate industry accreditation:

- ABTA - <http://abta.com/resource-zone/publication/health-and-safety-technical-guide>
- ATOL - <http://www.caa.co.uk/atol-protection/>
- EPA - <http://expeditionprovidersassociation.co.uk/>
- STF - <http://www.schooltravelforum.com/>

Providers who hold the LOTC QB (or have been checked by the Outdoor Education Advisory Service), are checked to ensure they hold all the appropriate accreditations and financial protections for their service provision.

In addition it is important to seek references from other groups that have used a provider.

Location & Environment

It is essential that the location and environment to be visited have been researched thoroughly. This can be done through:

- Prior knowledge from previous visits
- Contacting other organisations that have visited the location recently
- Researching guidance provided by the Foreign and Commonwealth Office (FCO) - , www.gov.uk/foreign-travel-advice, and organisations such as the British Council or Embassies - <https://www.gov.uk/government/world/organisations>.

Financial Viability

At the planning stage an accurate costing must be established and a realistic decision made regarding the viability of the proposed visit. Where contributions are expected from parents the information provided must be transparent and realistic, and should include hidden costs such as spending money, visas, inoculations, and additional activities and entrance fees. Contingency monies should be built into the budget for potential emergencies or unseen expenditures.

If fundraising activities are to contribute to financing the trip, the commitment required from participants has to be made clear from the outset. If support is being sought from external sources (grants, sponsorship, etc.) this should be secured before proceeding, to avoid unexpected costs once a commitment from parents/participants has been made. Parents must also be made aware of any payment plans and the consequences of withdrawing from the visit once initial payments have been made.

Passport and Visa Requirements

Visit Leaders must check the requirements and restrictions on passports, visas and participant's nationalities at an early stage in the planning process. Further information can be found here - <https://www.gov.uk/browse/abroad/passports>

Inclusion

Where it is reasonably practicable all children should be able to access the opportunity to participate in Overseas Visits. Visit Leaders should be aware of, and follow their employer's equality and inclusion arrangements.

A school is less likely to discriminate if it plans for a visit take into account the need to include all pupils irrespective of their protected characteristics rather than if it arranges a visit and then tries to adapt it to make it inclusive.

It is important to consider how accessible any visit is in terms of cost, venue, activities etc. Whilst it is not necessary for every participant to be able to take part in every activity it is necessary to make reasonable adjustments and consider alternatives to make the visit more inclusive.

In some circumstances additional staff may be required to allow an individual to participate – this needs to be taken in to account in the early planning stages when considering staffing and costs and must not be an additional cost as a result of any individual choosing to participate.

Insurance

There may be a range of insurance options available however it is important to check with in the early planning stage to check whether the employer has appropriate insurance cover in

place. This should include the following: General Travel Insurance, Public Liability, Third Party Insurance and Medical, Evacuation and Repatriation Insurance.

Where an employer has comprehensive insurance cover in place, additional insurance offered by a tour company is not necessary. Parents should be made aware of exactly what is and isn't covered by insurance.

Accommodation

In the planning stage the Visit Leader should investigate the availability and suitability of accommodation either through research or by contacting a tour operator. Be aware that standards in some countries are very different to those found in Western Europe and North America.

The Visit Leader should consider whether the accommodation:

- Fits with the aims and objectives of the visit
- Suits the needs and requirements of all participants (including disabled access)
- Is suitable for the gender mix of the group
- Provides adequate security and privacy for all participants
- Has easy access to toilets and washing facilities
- Complies with appropriate safety standards for the nature of the visit

Further information about checks that should be made in the planning stage and on arrival at a venue can be found in Section 11.11

Health

In the early planning stages and prior to departure it is important to:

- Check for pre-existing medical conditions of staff and participants
- Research the medical provision available at the location
- Check requirements for vaccinations and preventative medication
- Explore the possible use of a European Health Insurance Card Further advice is available from the NHS Fit for Travel website - <http://www.fitfortravel.nhs.uk/advice/general-travel-health-advice/school-groups.aspx>.

Personal safety

There are countries and areas in the world that are not suitable for school or youth group-led visits because it could expose participants to unacceptable risks. This can be a fluid and sometimes rapidly changing situation and thorough research has to be done at all stages of the planning process leading up to departure. Heads of Establishment and Visit Leaders have to be confident, that in visiting a particular area of the world, that the risks do not outweigh the benefits.

Participants should be made aware of their responsibilities in terms of keeping themselves and other group members safe. Further details can be found in 11.9 – Preparing Participants

11.4 Risk Assessment

It is the responsibility of the Visit Leader to prepare a specific risk assessment for all aspects of an Overseas Visit for which they are taking direct responsibility. It is very difficult to do this without a pre visit, or comprehensive researching of any relevant information available from: travel agents, tour operators, the Foreign and Commonwealth Office, Embassies, The British Council, or from other leaders who have undertaken similar trips.

Tour operators are responsible for risk assessing the aspects of the trip for which they are responsible. Visit Leaders should check that risk assessments are in place.

Visit Leaders are responsible for recording significant and foreseeable risks specific to their visit. This process should where possible involve accompanying adults and participants.

This should take into account:

- The participants (including leaders and helpers)
- The venue
- The culture
- The accommodation (in terms of how it affects the group)
- The food and drinking water
- Possible medical emergencies
- The activity
- Transport (to get there and in-country)
- Time of year

The findings of the risk assessment and the relevant precautions / controls, should be agreed and understood by all participants including accompanying adults (and parents where appropriate) and be reflected in the Visit Plan.

11.5 Establishing Ratios

As part of the risk assessment, careful consideration has to be given to establishing staff:participant ratios. Section 4.3 details the factors that could influence this decision but Overseas Visits may also need to take the following in to account:

- Increased risk of illness (staff and / or participants)
- More complex travel arrangements
- Possible delay in staff on 'stand by' being able to join group
- Inefficient communications systems

It is the responsibility of Heads of Establishment in discussion with Visit Leaders to ensure that adequate levels of supervision can be maintained should any situation arise during the trip which requires the undivided attention of one or more staff.

In some circumstances tour operators provide leaders / guides for the duration of the visit or for specific parts of a visit. Whilst this may influence decisions about ratios, consideration has to be given to the importance of accompanying adults knowing participants.

11.6 Information for Parents

For Overseas Visits the process of informing parents and participants will need to start well in advance of the visit. In some instances this may be one or two years prior to departure.

Specific information should be provided in writing to parents including:

- The purpose of the visit
- The proposed itinerary and the learning objectives
- The venue
- The costs
- Passport and visa arrangements
- Domestic and sleeping arrangements
- Health provision
- Supervision arrangements
- Travel arrangements
- Insurance cover
- Behaviour code

In addition to written information Heads of Establishment and Visit Leaders should hold a meeting/s where these points can be discussed.

Communication with parents should include making them aware of procedures for dealing with misbehaviour, or behaviour that gives Visit Leaders cause for concern, and the financial consequences of their child having to be returned home from an Overseas Visit.

11.7 Parental Consent

It is recommended that parental consent obtained for all Overseas Visits. Detailed information must be provided regarding the visit (see Section 11.6) to enable parents to give informed consent. It is important to remember that parents are giving consent for the itinerary and activities that they have been informed about. Whilst opportunities may arise to do additional activities once on the visit, care needs to be exercised to ensure that parental consent is not being abused.

As part of the consent form parents should be made aware of / and agree to, the procedures for dealing with unacceptable behaviour.

11.8 Alternative activities / changes to plans

Overseas Visits can often bring opportunities to take part in unplanned activities (local festivals, leisure activities, etc.) or for plans to have to change. It is important that any changes to plans do not vary considerably from what parents have given consent for, and that you do not take part in unplanned activities which would have required parents to have given informed consent e.g. water-based activities.

11.9 Preparing Participants

It is particularly important for an Overseas Visit to ensure that participants are well prepared.

Sufficient time should be given to enable participants to be informed and hold discussion about:

- The aims, objectives and benefits of the visit
- The nature and likely demands of the visit
- The domestic and sleeping arrangements
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times and the subsequent sanctions
- What to do in the event of an accident / incident

- Everybody's role in ensuring the safety of all participants

11.10 Transport

Travel to and from the visit location as well as travel throughout the duration of the visit requires careful planning. Section 6 provides generic guidance regarding transport but for Overseas Visits the following information should also be considered.

Inter-country

Overseas Visits can often include travelling across borders be it by air, train, road or ferry. Within Europe this might not be a major concern but in the developing world this can potentially bring about a host of different challenges.

The following are examples which may require consideration during the planning stage of any overseas visit:

- Health screening when entering other countries
- Visas and passports
- Access to local currency immediately on arrival
- Different baggage allowances
- Different customs allowances and banned items
- Use of cheap local airlines with potentially inflexible tickets
- The security of possessions, especially in terminals and on public transport In-country transport

All potential modes of transport have benefits and drawbacks depending on the country and the purpose of the visit. In some countries the safety of participants can be compromised by poor driving standards, badly maintained roads, and other road users and this issue must be outlined to participants and parents to ensure they are able to give informed consent.

Hired transport – The Visit Leader must as far as possible be assured that vehicles are well maintained and fit for purpose and that measures will be put in place to address the potential dangers of driver fatigue and over loading.

Public transport – Whilst some countries have high standards of provision others can have unreliable and overcrowded transport. It will be necessary to research the situation thoroughly before committing to using public transport, with particular focus on whether the

group can be adequately supervised in a potentially uncontrolled situation. The impact of a large group of young people on other travellers also needs to be considered.

Self-drive hire vehicles – Plan to use reputable hire companies and find out the legal requirements for driving in each country concerned. Previous experience of driving in the country is highly desirable before driving vehicles containing participants.

11.11 Accommodation

Prior to the visit the Visit Leader should if possible / appropriate:

- Make a prior visit
- Ask the tour operator for detailed information
- Compile a risk assessment
- Obtain a floor plan showing the location of the group's rooms. Ideally the rooms should be close together, with the leaders' quarters located nearby or adjacent to enable adequate supervision
- Allocate rooms to participants
- Ensure the Code of Conduct covers behavioural expectations when in their rooms
- Provide information for parents and participants about the type, quality and organisation of the accommodation

On arrival the Visit Leader should:

- Carry out a fire drill as soon as possible to ensure all participants are aware of the layout of the building, its fire precautions / exits, and the fire assembly point
- Check for any potential hazards (balconies, electrical connections, access to other rooms, external noise etc.) and if necessary establish control measures to deal with these. Where the hazards are extreme or cannot be managed adequately consideration has to be given to insisting on alternative accommodation
- Check that the bedding provided is clean
- Ensure all participants are aware of the system to ensure they are secure overnight
- Ensure that the participants are aware how to obtain assistance if required at any time
- Ensure that any providers used have been appropriately checked and vetted for use – and hold appropriate Public Liability insurance, financial security (ABTA), etc

11.12 Adventurous Activities

Adventure Activities abroad, whether organised by the Visit Leader or by a tour operator, require careful consideration.

In many countries there are equivalent standards and / or regulations to those found in the UK. However, in many other places the standards of safety required of providers are more limited or even non-existent.

Pertinent questions will need to be asked to provide assurances to parents that activities will be well-organised, safely carried out, and that any differences of operation are acceptable.

Visit Leaders will almost certainly have to seek advice from their employer about this aspect at an early planning stage.

11.13 Food and drinking water

Food, drink and hygiene overseas can vary considerably from the UK. It is advisable to identify potential hazards in advance and to make arrangements to mitigate any risk.

A pre-visit or seeking information from previous visitors will be useful sources of information, as are travel guides and the internet. Information about potential risks should be shared with participants and parents.

11.14 Language and local customs

It is an important part of any excursion abroad to investigate and understand the cultural differences of the country you intend visiting.

The aim should be to familiarise the participants in the habits and customs of the country so that they can interact in a socially aware way ensuring that they do not offend local customs. With this in mind a basic knowledge of the language can greatly enhance the experience of the visit for the participant.

Visit Leaders should be able to communicate effectively in the native language of the country or through a translator in order to manage the business relating to the Visit or any problems arising.

It is also important to know the laws that apply to your participants in the country visited, such as the age of consent, or the age at which alcohol can be bought and consumed.

11.15 Weather, climate and clothing

Research the conditions prevailing at the time of the planned visit.

This information should be used to inform participants and parents about any particular clothing/equipment requirements for the planned activities and to raise awareness of any significant risks.

11.16 Currency and contingency funds

It will be important to consider how spending money and contingency funds will be kept safe and accessed throughout the trip.

The following questions are examples of what should be considered by the staff team:

- Do we take shared responsibility for carrying spending money to reduce risks of theft?
- Do we have access to a credit card as part of the contingency fund?
- How would we pay for medical care if required?
- When/how do we exchange currency?
- Is there a safe in our accommodation?

11.17 Communication

In addition to the guidance in Section 14 (Emergency Procedures) the communication system for an Overseas Visit has to be flexible yet robust.

It is necessary to have a plan in place to enable routine and emergency communications with consideration being given to different time zones, mobile coverage, costs etc.

It is important that the Visit Leader and Establishment Based Contact have agreed the protocol for communication prior to departure. Research has to be done to ensure that any plans are realistic and workable. It is essential that participants and parents are clear about how and when communication will be possible and/or allowed.

Participants should be made aware of the potentially expensive costs of calls and data roaming when abroad.

11.18 Emergency Details

During an Overseas Visit it is important that the Visit Leader has adequate knowledge and information about participants to ensure their wellbeing.

Parents should be given the opportunity to pass on any relevant information on the Consent Form and by more informal approaches in the case where there is a need to provide more sensitive information discreetly.

The Visit Leader must carry up-to-date information for all participants (including accompanying adults) on the following:

- Relevant medical information
- Emergency contact details
- Any other information relevant to the specific visit, such as behavioural and psychological knowledge

It is essential that this information is shared with all the accompanying adults and external providers as appropriate

For Overseas Visits that involve adventurous activities or venues with specific identifiable risk, it may be appropriate to ask parents for information that may have an impact on the Health and Welfare of the participant (e.g. fear of heights, allergies to animals, water confidence, etc).

11.19 First Aid and Medical Facilities

Access to medical assistance and facilities, and the standard of those facilities, needs to be outlined to participants and parents in the early planning stage.

The aims and objectives of the visit can influence the degree of risk that parents and participants will find acceptable.

For example parents of a young person going on an Overseas Visit to Europe could reasonably expect access to similar medical care to that available in the UK. By contrast, the parents of a young person taking part in a visit to a developing country would need to accept that access to medical care is limited.

When considering the location of an Overseas Visit it is an important part of the risk assessment to consider:

- The type of medical facilities available
- How quickly medical care can be accessed
- The aims and objectives of the visit
- The age of the participants
- Any known medical needs

The risk assessment process will assist Heads of Establishment and Visit Leaders to agree the level of first aid provision that is required.

Although it would always be advisable to have a trained First Aider accompanying any Overseas Visit, it may be the case, that where the risk assessment determines the risk to be low, it may not be necessary to provide a trained first aider among the accompanying staff.

By contrast, if the risk assessment indicates a raised or high level of risk it will be necessary for one or more of the accompanying staff to hold a first aid certificate.

It should be noted that there are different levels of first aid training and qualification. Visit Leaders should consult with their local authority to establish the level of first aid required.

11.20 Natural Water Paddling or Swimming Activities

Swimming and paddling in natural waters such as rivers, canals, the sea or lakes can present significant hazards and the Visit Leader must prepare a risk assessment detailing any significant hazards and how they will be controlled.

Swimming activities should only take place in the presence of an appropriately qualified lifeguard e.g. Beach lifeguard for sea swimming, Open Water lifeguard for lakes and rivers, and Pool Lifeguard for swimming pools.

If paddling or cooling off in shallow waters is planned, it is expected that the Visit Leader, or other designated supervisor in the group, will have had the appropriate training as recommended by the Royal Life Saving Society (RLSS - <http://www.rlss.org.uk/> or other appropriate National Governing Body to supervise this activity.

Approval should be given initially by the Head of Establishment before being submitted to the employer to confirm the safety of swimming or paddling in natural waters.

Unplanned swimming in natural waters such as the sea, lakes, rivers, etc. should be avoided and this should be made clear to participants in the planning stage.

11.21 Swimming Pools Abroad

There are generally varying levels of provision in terms of facilities and safety management provided in swimming pools overseas.

Swimming activities should only take place in the presence of an appropriately qualified lifeguard e.g. a Pool Lifeguard for swimming pools.

NB: The majority of hotel swimming pools do not provide lifeguard cover.

When planning to use an unknown swimming pool for the first time the Visit Leader will need to consider the following:

- Is their Lifeguard cover provided by the owner / operator?

- Is life-saving equipment available?
- Are there adequate means of summoning help?
- Are the changing facilities adequate?

When considering whether to use a swimming pool it is also essential to consider the depth, layout and size of the pool to ensure that it is appropriate for the age and ability of the visit participants.

The risk assessment process should list the control measures for these factors and identify whether they are adequate to allow the activity to proceed.

It is recommended that approval should be given initially by the Head of Establishment before being submitted to the employer to approve the use of a swimming pool abroad.

11.22 Exchange Visits and Home-stays

The Planning of Overseas Visits that entails accommodating participants with Host Families introduces additional considerations.

These include:

- Choice of host families. If working with a partner school, they should normally undertake this role
- Matching each participant to a suitable family
- Vetting host families. In the EU there are normally systems in place to allow this to take place. If working with a partner school, they should undertake this role. Where no system exists it will be necessary to cover the possible consequences in the risk assessment, and provide detailed information to parents to enable them to give informed consent
- Setting up a communication system. This should include having a system so that participants can request staff support should they feel vulnerable or unsafe.
- Ensuring that the itinerary and activities whilst with the host families are compatible with the overall ethos and are acceptable to the parents
- Checking that the accommodation arrangements are suitable. Participants should have his/her own bedroom that is not part of a passage to other bedrooms, and a lockable bathroom
- Checking that additional support needs can be adequately accommodated
- Ensuring that at an early stage there are good communication channels with key personnel at the location and in the exchange country

12. Adventurous Activities

12.1 Introduction

Adventure Activities should form part of the natural progression of outdoor learning opportunities offered to young people. They can contribute greatly to the personal and social development of an individual as well as increasing their understanding of risk management.

Adventure Activities can be part of any category of visit and reference should be made to the relevant procedures within each specific type of visit.

If planning a visit which will include an adventurous activity, the Visit Leader is advised to seek advice from their employer.

12.2 Approval

Where Adventure Activities are part of a visit, it is recommended that approval should be given initially by the Head of Establishment and then by employer to confirm the safety of the adventure element.

12.3 Licensing

Under some circumstances providers of Adventure Activities to young people are required to hold a licence. At present this situation is under review. Further information can be found on the AALA website - <http://www.hse.gov.uk/aala/index.htm>.

The Visit Leader needs to be aware that some activities fall “within scope of the licence” and that anyone who provides these activities must be inspected by the Adventure Activity Licensing Service and hold a current licence. Details of licences and their validity can be found on the HSE website - http://www.aals.org.uk/aals/provider_search.php.

During inspections the Inspector must be satisfied that appropriate safety measures are in place for the provision of the specified licensed adventure activities. The Visit Leader does not need to make any further checks. The AALA website gives access to the list of licensed providers and activities that are “in scope”.

If planning a visit which will include an adventurous activity, the Visit Leader is advised to seek advice from their employer.

12.4 Adventure Activity Qualifications

Many Adventure Activities are overseen by National Governing Bodies (NGBs). These organisations control the training and assessment of leaders and have a system of

progressive qualifications. Further guidance can be found on the HSE website - <http://www.hse.gov.uk/aala/index.htm>, but Heads of Establishments Visit Leaders should consult their employer regarding their specific requirements.

If planning a visit which will include an adventurous activity, it is strongly recommended that advice be taken from an Outdoor Education Advisor or appropriate Technical Expert to ensure that an appropriate qualification is held by the activity leader/instructor for the activity.

12.5 Establishment-led Adventure Activities

Visit Leaders wishing to organise and deliver their own Adventure Activities should:

- Hold the relevant qualifications or have the necessary experience. It is acceptable to have been assessed and approved by an appropriate Technical Expert and have a signed statement of competence
- Prepare the relevant risk assessments
- Ensure that any equipment and supervision are in line with advice provided on their training and / or assessment courses

If planning a visit which will include establishment-led adventurous activity, the Visit Leader is advised to seek advice from their employer.

It is recommended that approval should be given initially by the Head of Establishment and then by the employer (in conjunction with the Outdoor Education Advisor / Technical Expert to confirm the safety of the adventure element.

12.6 Information for Parents / Parental Consent

For any visit which involves Adventure Activities specific information has to be provided in writing to parents and should include:

- The activities and the learning objectives
- The venue
- Medical provision
- Supervision arrangements
- Travel arrangements
- Insurance cover

Parental consent should be obtained for any visit which involves adventure activities. Detailed information has to be provided regarding the visit in order to enable parents to give informed consent.

12.7 Preparing Participants

It is particularly important for any visit which involves Adventure Activities to ensure that participants are adequately prepared.

Participants should be informed about:

- The nature and demands of the visit
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times
- What to do in the event of an accident / incident

The Visit Leader should ensure that:

- The aims and objectives of the visit are clear
- The planned activity matches the age and ability of the participants
- The participants are adequately trained for the venture

12.8 Remote Supervision during Adventure Activities

Remote supervision is the term used when the Visit Leader is not directly present with participants. Working without immediate supervision can help learners to develop independence and self-reliance.

If Remote Supervision is used as a part of the delivery of Adventure Activities the Visit Leader and / or the instructor should have significant experience in the relevant activity and should consult their employer in the planning stages.

Visit Leaders remain responsible for participants even when not in direct contact with them. They should not underestimate the challenges of remote supervision. It requires extra planning and contingencies to be put in place. This should be reflected in the Visit Plan.

When such activity is planned the visit leader must be confident that learners have the appropriate skills to operate without undue risk. Training and briefing should reflect this.

The Visit Leader in conjunction with a suitably qualified instructor should be satisfied that the participants have acquired the necessary skills, experience, confidence, fitness and judgement to be left without direct supervision.

The withdrawal of direct supervision should be a gradual four stage process:

- Accompanying the group
- Shadowing the group
- Checking regularly at agreed locations

- Checking occasionally at agreed locations

Particular attention needs to be given to the information provided to parents and participants before using remote supervision.

13. Venues with Specific Planning Considerations

13.1 Coastal and Inland Waterway Visits

Visit to coastal areas can be hugely enriching however they require additional consideration in the planning stages.

This type of visit includes the following areas:

- Cliffs (both on top and below) and coastal paths
- Beach / rock pools
- Tidal areas
- Causeways
- Harbours
- Rivers
- Locks
- Canals
- Ponds and lakes

In some locations it can be important to be able to assess the dangers using specific technical or local knowledge. The Visit Leader must prepare a risk assessment detailing any significant hazards and how they will be controlled.

It is recommended that approval should be given initially by the Head of Establishment before being submitted to the employer to confirm the safety of the coastal element.

13.2 Natural Water Paddling and Swimming Activities

Swimming and paddling in natural waters such as the sea, rivers or lakes can present significant hazards and the Visit Leader must prepare a risk assessment detailing any significant hazards and how they will be controlled.

Swimming activities should only take place in the presence of an appropriately qualified lifeguard e.g. Beach lifeguard for sea swimming, Open Water lifeguard for lakes and rivers, and Pool Lifeguard for swimming pools.

If paddling or cooling off in shallow waters is planned, it is expected that the Visit Leader, or other designated supervisor in the group, will have had the appropriate experience or

training as recommended by the Royal Life Saving Society (RLSS - <http://www.rlss.org.uk/> or other appropriate National Governing Body to supervise this activity.

Approval should be given initially by the Head of Establishment before being submitted to the employer to confirm the safety of swimming or paddling in natural waters.

Unplanned swimming in natural waters such as the sea, lakes, rivers, etc. should be avoided and this should be made clear to participants in the planning stage.

13.3 Hotel Swimming Pools

Swimming activities should only take place in the presence of an appropriately qualified lifeguard e.g. a Pool Lifeguard for swimming pools.

NB: The majority of hotel swimming pools do not provide lifeguard cover.

When planning to use an unknown swimming pool for the first time the Visit Leader will need to consider the following:

- Is their Lifeguard cover provided by the owner / operator?
- Is life-saving equipment available?
- Are there adequate means of summoning help?
- Are the changing facilities adequate?

When considering whether to use a swimming pool it is also essential to consider the depth, layout and size of the pool to ensure that it is appropriate for the age and ability of the visit participants.

The risk assessment process should list the control measures for these factors and identify whether they are adequate to allow the activity to proceed.

It is recommended that approval should be given initially by the Head of Establishment before being submitted to the employer to approve the use of a swimming pool abroad.

13.4 Farm, Agricultural and Animal Visits

Visits to farms can present particular issues in relation to health. Animals naturally carry a range of micro-organisms, some of which can be transmitted to humans, in whom they may cause ill health and which in some cases may be severe or life threatening. These are referred to as zoonotic diseases and commonly include E.coli O157 and cryptosporidium.

The following sources of information will provide Visit Leaders with what they need to know before farm visits and what precautions they can take to stay safe. Visit Leaders should also refer to their employer's policy.

- <http://www.farmsforschools.org.uk/ffsinformation/healthandsafety.htm>

- **Avoiding ill health at open farms - Advice to farmers:** The full code of practice is available at www.face-online.org.uk/CodeofPractice.

A shorter summary document and a teacher's supplement are also available to download. This document replaces AIS23: 'Preventing or controlling ill health from animal contact at visitor attractions' which has been withdrawn.

- **Farmwise** - Health and Safety Executive - MISC16546
- Further information about farm visits can be found here - <http://www.visitmyfarm.org/teachers>

If any child or member of the group shows signs of illness (i.e. sickness or diarrhoea) after a visit, advise them or their parent/guardian to visit the doctor and explain that they have had recent contact with animals.

14. Emergency Procedures

14.1 Introduction

Emergency procedures are an essential part of planning a visit. Maintained schools and establishments should follow Kent County Council's guidance on emergency planning procedures - <http://www.kelsi.org.uk/school-management/maintenance-and-operations/emergency-planning>

Independent schools, Academy and Free schools, etc should have their own emergency planning arrangements.

NB: Kent County Council as a 'Category 1' responder has a humanitarian responsibility for the well-being of Kent's residents and would therefore provide support all schools during a major emergency.

14.2 Preparation

Prior to departure on any visit, information should be left with a pre-arranged Establishment-Based Contact.

This information should include:

- Group names
- Visit location and itinerary
- Expected timings
- Transport arrangements
- Emergency contact details for participants
- Medical information regarding participants

Where appropriate this information should be carried by the Visit Leader and other Visit Assistants.

14.3 Establishment-Based Contact

The Establishment-Based Contact has a key role in the Emergency Procedure.

It is their role to ensure that:

- Information regarding a visit is kept in a secure but accessible location

- If a visit is returning out-with normal hours, or involves an overnight, that visit information is readily accessible
- They know who to contact if an accident or incident is of a serious nature
- They are available 24/7 throughout the duration of the visit

The nature, duration and type of visit will determine the most appropriate Establishment-Based Contact. For visits of a longer duration or those involving higher risk activities it is recommended that more than one Establishment-Based Contact is provided.

14.4 Immediate Action in an Emergency

In the event of an emergency the immediate priorities of the Visit Leader or any Leader who has to deputise for them, are to:

- Assess the situation
- Safeguard the uninjured members of the party including the leaders
- Attend to the casualties
- Inform the Emergency Services
- Inform the Establishment-Based Contact
- Continue to manage the situation to the best of their ability

14.5 External Contact

If an incident or accident is likely to attract media attention, it is important wherever possible that communication with the media and other external agencies is undertaken by someone trained in this role. Heads of Establishments and Visit Leaders should follow their own employer's policy relating emergency planning and media contact.

The following points should be considered:

- Nobody in the party should speak to the press
- Media enquiries should be referred to a designated media contact
- Opportunities for external agencies to get access to group members and leaders should be minimised
- Group members should be discouraged from phoning home in the immediate aftermath of an Incident - inaccurate or incomplete information might cause unnecessary speculation and anxiety. However a responsible person should do so on their behalf to provide reassurance if there is potential for a media leak

- Casualty names should not be released externally
- Nobody should discuss legal liability with other parties
- Group members should be discouraged from taking personal photographs of accident sites

14.6 After a Serious Incident

It is not always possible to assess whether group members not injured or directly involved in the incident have been traumatised or whether other participants or staff in the establishment have been affected.

In some cases reactions do not surface immediately. Establishments in this situation have sometimes found it helpful to contact local community support services and to seek professional advice on how to help individuals and the establishment as a whole cope with the effects of a tragedy.

Following any serious incident in which an employer's emergency procedures have been utilised, it would be appropriate to conduct a review of the incident and how it happened, and of how the procedures were implemented. Any lessons to be learned should be incorporated into risk assessments, operating procedures and emergency planning arrangements.

The purpose of the review should be to:

- Establish the facts
- Determine whether there are lessons to be learned
- Provide information to parents
- Exchange information with statutory investigation bodies as required e.g. police, Health & Safety Executive
- Manage media enquiries

14.7 Reporting Accidents and Incidents

The employer's accident reporting procedures should be used to record all accidents and incidents.

Any near-misses must be reported to the Head of Establishment and recorded as appropriate. Any lessons learned as a result of a 'near-miss' should be incorporated into risk assessments, operating procedures and emergency planning.

21. Appendix: Further Resources

Useful Information and Resources

- **Kent Framework for Safe Practice on Educational Visits and Outdoor Learning –**
<http://www.kelsi.org.uk/Curriculum/outdoor-education>
- **Outdoor Education Advisors Panel (OEAP) National Guidance for Educational Visits and Activities –**
<http://oeapng.info/>
- **DfE Guidance on the Health and Safety of Pupils on Educational Visits -**
<http://www.kelsi.org.uk/policies-and-guidance/health-and-safety-guidance/curriculum-topics>
- **Emergency Planning Guidelines for Kent Schools -**
<http://www.kelsi.org.uk/running-a-school/maintenance-and-operations/emergency-planning>
- **Guidance on First Aid for Schools – A Good Practice Guide Managing Medicines in Schools and Early Years Settings -**
<http://www.kelsi.org.uk/policies-and-guidance/health-and-safety-guidance/risk-assessment>
- **KCC Incident / Accident Reporting -**
<http://www.kelsi.org.uk/policies-and-guidance/health-and-safety-guidance/accident-reporting>
- **KCC Health and Safety Inspection Proforma -**
<http://www.kelsi.org.uk/policies-and-guidance/health-and-safety-guidance/management-of-health-safety>
- **HSE – School Trips: Tackling the Health and Safety Myths -**
<http://www.hse.gov.uk/services/education/school-trips.htm>
- **HSE – Case Studies – Real Life Examples**
<http://www.hse.gov.uk/services/education/case-studies.htm>
- **HSE 5 Steps to Risk Assessment and Risk Assessment and Policy Template -**
<http://www.hse.gov.uk/risk/fivesteps.htm>

Useful Contacts

- **The Outdoor Education Advisory Service**
Tel: 03000 416539 / Email: outdoor.education@kent.gov.uk
Location: The Swattenden Outdoor Centre, Swattenden Lane, Cranbrook, TN17 3PS
- **KCC Health and Safety Unit**
Health and Safety Advice Line: Tel: 03000 418456 / Email: HealthandSafety@kent.gov.uk
Location: Room 3.32 Sessions House, Maidstone, ME14 1XQ
- **KCC Insurance and Risk Management**
Tel: 03000 416440 / Email: insurance@kent.gov.uk
Location: Room 2.53 Sessions House, Maidstone, ME14 1XQ
- **Health and Safety Executive (HSE)**
Enforcement of Health and Safety Legislation. -
<https://extranet.hse.gov.uk/lfserver/external/F2508IE>
Tel: 0845 345 0055 online reporting.
- **RIDDOR Incident Contact Centre**
The reporting service for work-related health and safety, RIDDOR incidents to the HSE. Website: www.riddor.gov.uk. E-mail: riddor@connaught.plc.uk
- **Safe Practice in Physical Education and School Sport**
Association for Physical Education (AfPE) - www.afpa.org.uk
Tel: 0118 378 6240, Email: enquiries@afpe.org.uk