

Outdoor Education, Visits and Off-Site Activities Health and Safety Policy

Devon County Council and Torbay Council Establishments

September 2024



Key Changes from the September 2022 Policy Document

1. A new SOP template has been produced for Alternative Provision. This template more accurately reflects the arrangements when pupils are taking part in off-site alternative provision.
2. The SOP templates have been amended to remove the need for Visit Leaders to insert a signature. The statement about the SOP being sufficient/insufficient has been removed as following completion the SOP should always be 'sufficient'.
3. Guidance has been produced regarding the inclusion of pupils in off-site visits where their behavior causes concerns regarding their safety or the safety of others. Schools should make it clear in the 'offer' to parents that participation is not guaranteed and is subject to acceptable behavior. Page 5.
4. Overnight camping visits as part of Ten Tors of Duke of Edinburgh Award activities must be submitted to the LA 2 weeks in advance. This is a change from the previous 2 months. Page 22.
5. Additional guidance on Forest Schools and tree climbing activities. Page 46.
6. The requirements for companies providing overseas expeditions or fieldwork have been changed. Providers must either: be members of the Expedition Providers Association or, hold the Learning Outside the Classroom Quality Badge or, must operate to British Standard BS 8848:2014 and have gained 'other party' assessment. Page 56.
7. Guidance has been reintroduced regarding horse riding/pony trekking which had been omitted from the 2022 policy. Page 64.
8. Guidance has been produced regarding school sports competitions where the school is asked by parents to enter a team. Page 64.
9. The Provider Questionnaire has been updated to include questions about overseas expeditions and fieldwork accreditation. Page 82.

Please note that the first point of contact for support through Evolve and for health and safety in outdoor education is: Devon Health & Safety Service, Devon County Council, HR ONE, County Hall, Topsham Road, Exeter, EX2 4QD

Tel : 01392 382027 Email: healthandsafety@devon.gov.uk

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SECTION ONE

1. INTRODUCTION

- 1.1 This is a combined policy document so unless there is reference to one specific council in the text, the term 'Local Authority' (LA) relates to both Devon County Council and Torbay Council. When this policy refers to 'Headteacher' this applies to senior management for non-school establishments.
- 1.2 This policy document applies to those establishments who are Devon County Council (DCC) or Torbay employers (such as maintained schools) and non-DCC or Torbay establishments (such as academies) who formally adopt this policy.
- 1.3 To comply with this policy each establishment must have their own local off-site and adventurous activities policy and establishment specific Standard Operating Procedures (SOP). A model off-site and adventurous activities policy and model standard operating procedure templates are available on *Evolve*.
- 1.4 The activities that are covered in this policy are all aspects of outdoor learning, visits and residential experiences which take place on school/establishment grounds or away from the school/establishment.
- 1.5 Outdoor education helps young people to:
- acquire skills which promote well-being and healthy lifestyles into adulthood
 - develop knowledge and understanding about risks to promote their own and others' safety
 - enjoy and achieve as a result of opportunities to develop as successful and confident learners
 - gain a heightened awareness of the local and global environment and our role within it
 - gain and apply key skills including leadership, team working and decision making, so that they are better able to achieve economic wellbeing.
- 1.6 Outdoor education, visits and off-site activities should be available to all who wish to participate, irrespective of gender, religion, ethnic origin, social background, medical need, or physical ability.
- 1.7 This policy does not cover work experience placements for which separate arrangements apply.

2. THE LEGAL FRAMEWORK

Health and Safety Legislation

- 2.1 The principal piece of health and safety legislation is the *Health and Safety at Work, Etc Act 1974* ('the Act') and the specific Regulations made under it appertaining to outdoor adventure activities. The Act requires that employers must do all that is reasonably practicable to ensure the health, safety and wellbeing at work of employees and non-employees, including young people, who are affected by their work.

Equality Legislation

- 2.2 Planning for visits and activities must also take account of the *Special Educational Needs and Disability Regulations 2014*, *The Equality Act 2010* and *Supporting Pupils at School with Medical Conditions Statutory Guidance 2015*. Schools should seek to anticipate the needs of pupils who are disabled as well as the needs of specific pupils. Specifically, schools must not:
- treat a disabled pupil less favourably than another for a reason related to their disability and without justification
 - fail, without justification, to take reasonable steps to avoid placing
 - disabled pupils at a substantial disadvantage in comparison with their non- disabled peers.
- 2.3 In essence, equality legislation requires establishments to:
- plan ahead to meet the needs of all disabled pupils
 - identify potential barriers to inclusion
 - work collaboratively with disabled pupils, their parents and others
 - identify practical solutions through a problem-solving approach
 - ensure that staff have the necessary skills to respond effectively
 - monitor the effects of adjustments on a pupil's progress.

Adventurous Activity Legislation

- 2.4 The *Adventure Activities Licensing Regulations 2004* dictates a list of adventurous activities for which providers and venues must be licensed in order to be able to deliver them and this list is available at: [Licensable Activities \(hse.gov.uk\)](https://www.hse.gov.uk/licenses/activities.htm)
- 2.5 *The Activity Centres (Young Persons Safety) Act 1995* made it a legal requirement for all providers of adventure activities to obtain a license if these were intended for persons under 18 years old when parents are not present, and payment is made.

- 2.6 The Adventure Activities Licensing Authority (AALA) is the body which oversees adventurous activities in the UK. AALA is part of the Health and Safety Executive (HSE), the HSE has issued the following guidance document “Guidance from the Licensing Authority on the Adventure Activities licensing Regulations 2004” (L77): [Guidance from the Licensing Authority on the Adventure Activities Licensing Regulations 2004 \(hse.gov.uk\)](https://www.hse.gov.uk/l77/)

Safeguarding Children Legislation

- 2.7 *The Children Act 1989, The Children and Social Work Act 2017 and The Safeguarding Vulnerable Groups Act 2006* makes it a legal duty for organisations and individuals to assume a responsibility for the supervision of young people, and this cannot be delegated.
- 2.8 There is a ‘higher duty of care’ on teachers and other professional staff because of the role they carry out and the greater knowledge they are assumed to have of young people and specialised activities. The level of judgement expected of staff is related to that individual’s knowledge, experience and training.
- 2.9 Any staff member who takes responsibility for a child has an ‘*in loco parentis*’ responsibility towards that child. That person may do what is reasonable to safeguard or promote the child’s welfare – they should act in the best interest of the child (or children) in their care.
- 2.10 All Devon and Torbay council employees and other adults whose work involves regular or unsupervised access to young people under the age of 18 are screened in conjunction with the Disclosure and Barring Service (DBS). This is based on the enhanced disclosure.
- 2.11 It is also a requirement that all volunteers, should be subject to DBS checks when they have regular or unsupervised contact with young people. Under no circumstances should staff or volunteers, in respect of whom no checks have been obtained, be left unsupervised or engage in regulated activity with pupils.
- 2.12 Headteachers of establishments who give approval for off-site activities will need to consider whether any accompanying adults, including volunteers and parents, have unsupervised access to pupils and whether they need to apply for a DBS check in line with statutory requirements. For further information, please contact the Safer Recruitment Service on 01392 383266 or email: disclose@devon.gov.uk. Alternatively, go to: [Safer recruitment service - Working for Devon County Council](#).
- 2.13 Off-site activities and visits are subject to the same level of safeguarding as in school. Where off-site activities are provided by the school, the schools own child protection policy and procedures apply. Headteachers should ensure that the school safeguarding policy reflects the type of off-site visits the school engages in.

- 2.14 External providers are not required by law to undertake DBS checks on their staff, as they are not a “specified establishment”. The Provider Questionnaire (SOE5) asks providers whether their staff are DBS checked. Schools using external providers should ensure that where their chosen provider does NOT DBS check staff, school staff accompany the pupils at all times.
- 2.15 Devon and Torbay Councils require that every driver and recommends every adult engaged in providing transport on behalf of the council has an enhanced, current DBS check. This recommendation includes parents or volunteers even if they are not left alone on the vehicle with young people.
- 2.16 More information on safeguarding is available from:
Devon: [Safeguarding - Support for schools and settings \(devon.gov.uk\)](https://www.devon.gov.uk/childrens-services/childrens-protection/safeguarding)
Torbay: [Home - Torbay Safeguarding Children Partnership](https://www.torbay.gov.uk/childrens-services/childrens-protection/safeguarding)

General Data Protection Regulation 2016 (GDPR)

- 2.17 Notwithstanding *General Data Protection Regulation 2016*, employers have a responsibility to ensure Visit Leaders and accompanying adults know what they need to know about young people under their supervision. This may include (this is not exhaustive):
- Medical details of young people and accompanying adults
 - Dietary requirements of young people and accompanying adults
 - Parental contacts
 - Passport details.
- 2.18 This information may be shared through Evolve or other school approved systems.
- 2.19 Where required, establishments should ensure an appropriate privacy statement regarding GDPR appears on parental activity consent forms.
- 2.20 A privacy statement regarding the GDPR compliance of the Evolve website is available on each web page on Evolve.

Civil Law

- 2.21 Under Civil Law in England there is a Limitation to Claims in relation to personal injury of 3 years. However, in personal injury cases involving a child, the limitation period does not start to run until the child reaches the age of 18,

therefore schools have a valid reason to hold a child's personal data such as medical or dietary needs which may be required by the school to defend a claim until the child's 21st birthday.

- 2.22 Visits on Evolve are archived automatically and the records kept. Therefore, where a significant incident has taken place, the Council recommends attaching the additional information, accidents forms, parental consent forms, etc. to the Evolve visit form.
- 2.23 The establishment will need to retain all the visit information where the visit is not notified on Evolve. This will apply where an establishment chooses not to use Evolve for Category A visits.

Charges for Visits

- 2.24 Sections 449-462 of the *Education Act 1996* sets out the law on charging for school activities in schools maintained by local authorities in England. Academies (including free schools, studio schools and university technical colleges) are required through their funding agreements to comply with the law on charging for school activities. See www.gov.uk/government/publications/charging-for-school-activities.
- 2.25 Most school off-site activities are referred to as 'Optional Extras' (see above government guidance on Charging for School Activities) and are funded by 'voluntary contributions'. This especially applies to residential and overseas visits.
- 2.26 Schools should provide parents/carers with clear terms & conditions of payment for such activities. These can be inserted into any applicable consent or application form. Or they can be referred to therein if they are available to parents/carers elsewhere, such as on the school website. Schools are already required to publish their Charges and Remittances Policy. These terms and conditions could be an appendix to this document or a separate policy.
- 2.27 Schools should also consider whether a pupil's previous pattern of behaviour should influence their decision on whom to accept on a place. Any such conditions of acceptable behaviour should be included within the terms & conditions of payment.
- 2.28 Schools can sometimes be faced with a situation where a pupil's behaviour presents risks to themselves or others, and/or falls foul of the school's Behaviour Policy but the school faces financial penalties from travel companies or external providers if the pupil is removed from the visit.
- 2.29 Schools should consider stating within the terms and conditions of payment that acceptance on the visit is subject to a pupil's compliance with the school's

Behaviour Policy and that application alone does not guarantee a place. Furthermore, if once accepted and prior to the visit taking place, the pupil's behaviour breaches the school's Behaviour Policy then the school reserves the right to remove the pupil from the visit and withhold any monies paid by parents/carers if they are non-refundable to the school as part of the travel company's or external provider's own booking terms and conditions.

- 2.30 It is essential that any such decisions taken by the school, are in line with the school's Behaviour Policy, and comply with *The Equality Act 2010* (see: [Equality Act Advice Final.pdf \(publishing.service.gov.uk\)](#) and SEND legislation).

3. ROLES AND RESPONSIBILITIES

Local Authority (LA)

- 3.1 This term applies to both Devon County Council and Torbay Council, unless there is specific reference to one local authority. The local authority will:
- make this policy document available to all establishments within the LA
 - monitor and endorse proposals for specified types of visits
 - provide training related to managing off-site activities
 - provide access to information and advice
 - establish points of contact in the event of an emergency
 - maintain specified insurance cover for maintained schools
 - monitor and review safety for off-site activities.

Adviser for Outdoor Education

- 3.2 In addition to the DCC Health & Safety Team Advisers, specific technical advice is provided to the LA, schools and establishments from the Adviser for Outdoor Education. Contact Details:

Email: brendan.stone@devon.gov.uk

Phone: 07968818044

- 3.3 The Adviser for Outdoor Education is a member of the Outdoor Education Advisers Panel and provides advice to the Local Authority and maintained schools and to subscribing academies and independent schools through a Service Level Agreement with Devon Education Services.
- 3.4 The Adviser for Outdoor Education provides endorsement of Category B and C visits on behalf of the Local Authority via Evolve. All non-maintained schools, Academies and Independents schools that subscribe to the DCC Health & Safety Service must ensure that they have access to the Adviser for Outdoor Education (Devon Education Services) in order to be able to fully comply with this policy.

The Governing Body

- 3.5 The governing body should agree the overall policy for managing off-site activities. This is done by endorsing the use of this policy, creating the establishment's own supplementary policy and specific standard operating procedures for routine and regular visits. There are model off-site policy and standard operating procedure templates available on Evolve.

The Headteacher

- 3.6 The Headteacher, on behalf of the governing body, will authorise all off-site visits and activities and provide a regular report to the governing body summarising the range of proposed visits and those which have already taken place.
- 3.7 The Headteacher should ensure that the planning and management of off-site activities complies with this document and their school policies, before endorsing a visit.
- 3.8 The Headteacher may delegate this function to a senior member of staff who has appropriate authority to make decisions regarding curriculum and pupil safety in the Headteacher's absence.
- 3.9 The role of 'Head' on Evolve should NOT be delegated to someone with a business management, administrative or health & safety role alone. In approving off-site visits the Head also has responsibility for ensuring the visit has clear educational outcomes and sits with the school curriculum, and that the Visit Leader and accompanying staff are the right people to teach that lesson to those children at that location. Whoever has responsibility for approving off-site visits, final responsibility rests with the Headteacher.
- 3.10 The Headteacher should give particular attention to ensuring that:
- The proposed visit has clear educational benefits and outcomes
 - Local Authority and establishment policy and procedures are followed
 - The Visit Leader and additional staff are competent to manage the visit for the specific group they are responsible for and for the intended environment
 - Suitable child protection measures are in place
 - Risks have been assessed, recorded and safety measures put in place.

The Educational Visit Co-ordinator (EVC)

- 3.11 The role of the EVC is to ensure establishment visits are carried out in line with this policy and establishment's policies. Overall responsibility rests with the Headteacher.
- 3.12 The EVC should be specifically competent and trained for the task; they should have practical experience in leading and managing a range of visits similar to those typically run by the establishment. Where this is not the case, the Headteacher must reasonably limit the extent to which the function of the EVC is delegated.

3.13 The EVC will be the principal contact with the local authority over planned visits and work with Visit Leaders to ensure:

- educational visits follow policies and procedures
- the management of visits and off-site activities is informed by an appropriate risk assessment process
- approval arrangements are satisfactory and based on safe practice and clear educational objectives
- staff have access to advice and information
- leaders and staff meet identified standards and are competent to lead and support particular visits and activities
- relevant training, induction and other Continuous Professional
- development opportunities are provided
- procedures are in place to inform parents and for them to give consent
- emergency arrangements are in place for visits and off-site activities
- there is a system to keep and review records of visits, accident and incident reports
- systems are monitored and reviewed. This may include accompanying visits on a sampling basis
- external providers have a clear contract, and robust checks have been made.

The Visit Leader

3.14 The Visit Leader must be an employee of the establishment and present on the school visit. There are exceptional circumstances where this may not be the case, contact the Adviser for Outdoor Education for further advice.

3.15 The Visit Leader has overall responsibility for the supervision and conduct of the visit. By authorising a visit, the Headteacher confirms the Visit Leader's competence to lead a well-planned, high quality educational visit in a safe manner.

3.16 The Visit Leader must:

- get approval from the Headteacher before any off-site visit or activity takes place
- follow their establishment's policy and Standard Operating Procedures
- assess the risks involved and amend the Standard Operating Procedure through the enhanced risk assessment
- brief staff, volunteers and pupils on the risks and control measures
- inform parents about the visit and gain their consent where necessary

- re-assess risks while the visit takes place and act on that assessment
- provide relevant information to other staff, volunteers or providers about their roles and duties, the nature of the visit, location, and participants
- ensure that all staff and any external provider have access to emergency contact and emergency procedure details
- agree a clear working relationship with any external providers, including clear hand-over of child supervision.

Other Members of Staff

- 3.17 The Visit Leader may require other staff to assist in the visit. The Visit Leader should ensure that they are:
- clear about their roles and responsibilities and carry out that role in an appropriate manner
 - competent to carry out their allocated roles and responsibilities
 - clear about emergency contacts and details
 - clear about the hand-over arrangements with any external providers.
- 3.18 The involvement of establishment staff can help to meet recommended staffing ratios, provided the responsibilities placed on establishment staff are appropriate and those staff have the competence or qualifications needed.

Volunteers and Parent Helpers

- 3.19 Visit Leaders occasionally have volunteers or parent helpers accompanying them on visits. It is important that, like other members of staff, they are clear about their roles and responsibilities.
- 3.20 If parent helpers also have their child attending the visit, it is particularly important the Visit Leader has made clear what the parent's responsibilities are in the event of an emergency.
- 3.21 Where volunteers are relied upon due to their leadership award i.e., Ten Tors, DofE etc. then they must be; actively involved in the risk management process and included within the accompanying adults as a volunteer on the Evolve visit form
- 3.22 The EVC is responsible for ensuring volunteers qualifications and awards are recorded on Evolve and that appropriate checks such as DBS, driver declaration etc. are completed and recorded on Evolve.

Young People

- 3.23 While taking part in off-site activities young people also have responsibilities which they should be made aware of for their educational development, their own health and safety and that of the group. Young people should be involved, at an appropriate level, in the planning and managing of visits and activities including risk assessment. Young people should:
- not take unnecessary risks
 - follow instructions of the Visit Leader and other members of staff
 - behave sensibly, keeping to any agreed code of conduct
 - inform a member of staff of significant hazards.

External Providers

- 3.24 External providers are third parties contracted to provide instruction or coaching for 'adventurous' activities, residential accommodation, travel packages, or overseas expeditions.
- 3.25 Employees of external providers are usually responsible for technical instruction; but overall supervision is the establishment's responsibility and as such the establishment retains the Duty of Care of the children at all times.
- 3.26 Establishment's must have a clear contract with external providers and at a minimum, every provider must complete the Provider Questionnaire (SOE5), unless they already hold the Learning Outside the Classroom Quality Badge.
- 3.27 Establishments using external providers must check that all licences, including any ALAA licence and insurance policies are up to date at the time of the visit. Validity of AALA licences can be checked here: [Adventure Activities Licensing Scheme \(AALS\) - Looking for a provider? \(hse.gov.uk\)](#)
- 3.28 Where an external provider takes children off site without a member of the establishment's staff present, specific additional checks are required. An example of this would be if a secondary school running Duke of Edinburgh award without staff qualified or available to lead, contracting in the provision from an external provider. Checks would include:
- The rationale for the arrangement, including the choice of external provider. It should be clear why this programme and the arrangements are in the best interests of the pupils
 - A clear contract setting out the responsibilities for supervision delegated to the external provider
 - A named Visit Leader, employed by the school, who retains overall responsibility for the programme and the pupils on the visit

- Agreement for pastoral care of the pupils
- Clear arrangements for action to be taken in the event of any incident, accident and emergency
- Clear and specific consent from parents
- Evidence of the monitoring of the programme, which must include visits to off-site provision.

Venues

- 3.29 Venues such as theme parks, water parks, fun fairs, museums, theatres, zoos, shops, skate parks etc. are NOT classed as ‘providers’ and are not required to complete a SOE5. They may have chosen to gain the Learning Outside the Classroom (LOTC) Quality Badge, but this is not requirement of the Local Authority for such venues.
- 3.30 All venues open to the public or providing services to customers are bound by the *Health and Safety at Work etc. Act 1974* to provide a safe working environment for the public, visitors and customers. Establishments are not required to ask such venues for risk assessments.

Training for Roles and Responsibilities

- 3.31 **Head/EVC training & briefings:** Headteachers and EVCs new to the role should undertake the 1-day new Head/EVC training course. Head teachers or EVCs should then attend at least one half-day briefing per year in order to remain up to date with current practices. Head/EVC training can be booked at: [Devon Education Services online shop | DES](#)
- 3.32 **Visit Leader training:** The Adviser for Outdoor Education can deliver INSET training for Visit Leaders/school staff. A half day visit to school is included in the annual subscription for academies and independent schools, which can be used for staff training. For LA maintained schools this is a chargeable activity. Contact the Adviser for Outdoor Education to discuss your needs.

SECTION TWO

4. RISK ASSESSMENT AND STANDARD OPERATING PROCEDURES

- 4.1 The DCC and Torbay Local Authorities, along with the HSE, recognise 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.

*“Well-managed school visits and outdoor activities are great for children.
Children won’t learn about risk if they’re wrapped in cotton wool”*

*HSE School trips and outdoor learning activities, Tackling the Health and Safety Myths
(2011)*

- 4.2 Striking the right balance between allowing young people to engage with the challenge of outdoor education whilst also ensuring that risks are within acceptable parameters is achieved by a considered assessment of risk.
- 4.3 In addition, risk assessment is a legal requirement. Every educational visit or series of visits, (e.g. fixtures or a series of swimming lessons), must be subjected to a risk assessment process irrespective of visit category, duration or frequency. This process must be recorded.
- 4.4 The risk assessment of off-site visits is simply:
- Identification of what could go wrong or cause harm during the visit
 - Making a judgement to see whether the planned precautions reduce the risk of significant harm to an acceptable level
 - Deciding what else needs to be done if the risk has to be reduced further
 - Making a balanced judgement between risk and benefit.
- 4.5 By authorising a visit, the Headteacher is confirming that the risk assessment measures are appropriate and sufficient and therefore the Headteacher should ensure that any SOP/risk assessment documents are accurate and completed correctly.

Standard Operating Procedures (SOPs)

- 4.6 'Standard Operating Procedures' (SOP) is the name given to the generic risk assessments provided to guide minimum requirements for outdoor education activities and off-site visits. The SOP approach to risk assessment was introduced to achieve some consistency in professional practice for staff taking children off-site and to allow a setting's senior leaders to set clear expectations for these activities.
- 4.7 The generic SOP documents can be found in the 'Standard Operating Procedures and Risk Assessments' tab in the Resources section of the Evolve system. There are 5 SOP templates for different types of visit available for establishments to adapt:
- Day visits, walking from school
 - Day visits using transport
 - UK residential visits
 - Overseas residential visits
 - Alternative Provision
- 4.8 There is a two-stage process to the use of SOPs:

Step One - Creating Establishment Specific SOPs

- 4.9 The baseline generic SOP documents should be taken from Evolve and amended to meet the needs of the establishment's routine visits planned for the academic year. Headteachers, senior leaders and Educational Visit Coordinators should review, discuss and agree changes to the middle column of the generic SOP documents to create the establishment's own specific SOPs.
- 4.10 If desired at this stage, several different SOP documents can be created out of a single generic SOP to meet the establishment's needs. For example, day visits using a mini bus, day visits using a coach, sports fixtures etc. This will minimise the unnecessary inclusion of a irrelevant information in any final document used by a Visit Leader.
- 4.11 Once agreed, the establishment specific SOP documents should be signed by the Headteacher and Designated Safeguarding Lead. This is the leadership team's opportunity to set minimum standards for their Visit Leaders to follow.
- 4.12 When complete, EVCs should upload their establishment specific SOPs to their own 'establishment library' on Evolve. There is a guide on the system which will take colleagues through this process.

Step Two - Visit Leader Completion of the Establishment Specific SOP

- 4.13 The second part of the process is that, for each individual visit, the Visit Leader should take the most appropriate establishment specific SOP for the visit that they are organising, and add their name and the name and date of the visit. They should then complete the final right-hand column to add any additional arrangements which are specific to that particular visit. This could be arrangements for pupils with additional needs, specifying details about group ratios, arrangements for times of indirect supervision etc. This part of the process is called the 'Enhanced Risk Assessment'.
- 4.14 Further instruction is included in the generic SOPs themselves as well as in the *Guidance for Planning an Off-Site Visit* document which is available on Evolve.

Adventurous Activity led by School Staff Risk Assessment

- 4.15 If the visit is an adventurous activity led by a member or members of establishment staff, the Visit Leader, in addition to the SOP, will need to write an Adventurous Activity Risk Assessment which should focus solely on the particular hazards of that adventurous activity.
- 4.16 For example, for a Ten Tors training event, the Visit Leader would complete a SOP for the whole event including, travel, pupils' medical needs, etc. and complete a separate Adventurous Activity Risk Assessment focusing on the specific hazards i.e. getting lost, crossing rivers, staff check points, etc. It need not repeat anything already in the SOP. An Adventurous Activity Risk Assessment form template is available on Evolve.
- 4.17 For Devon establishments see the HS/HSA47 Risk Assessment Arrangements document for further advice on completing risk assessments.
- 4.18 Generic risk assessment templates for adventurous activities run by an establishment are *not* provided by the Local Authority. If the Visit Leader is 'competent' to lead the activity, then they should be able to carry out and record a risk assessment for it. If they cannot carry out the risk assessment, then they cannot be considered competent to lead the activity.

Dynamic Risk Assessment

- 4.19 Whatever the visit category, the risk assessment process should continue during the visit. This ongoing process of risk assessment is sometimes referred to as a 'dynamic risk assessment'. This involves professional judgements by all those involved in the visit in response to changing circumstances during the visit.
- 4.20 The ongoing risk assessment involves staff monitoring the control measures and adapting them as required. These ongoing decisions will determine the safety of

the group and the success of the activity. It is not expected that Visit Leaders write down this ongoing risk assessment. However, after the visit the Visit Leader should record significant findings as a note on the visit form, in order to inform future visits.

External Providers' Risk Assessments

- 4.21 Visit Leaders **do not** need to see the detailed risk assessment produced by an external provider if they are confident about the overall management of that provider. Indeed, it would be reasonable to presume that they would not have the expertise to judge risk assessments if they are not qualified to lead the activity themselves.
- 4.22 Holding the LOTC Quality Badge, an AALA licence and/or the completion of the SOE5 helps to confirm that management standards are appropriate.

Venue Risk Assessments

- 4.23 Visit Leaders **do not** need to request risk assessments for residential buildings or venues, if the Visit Leader has specific concerns about their use of a venue, (i.e. a child with reduced mobility or visual impairment etc.) then they should visit the venue and carry out their own risk assessment with the child's needs in mind and document any additional actions required in the Standard Operating Procedures, enhanced risk assessment column. If a pre-visit is not possible then a conversation should be had with the venue operator to address any concerns.

5. ADVENTUROUS ACTIVITIES LED BY EXTERNAL PROVIDERS

Provider Standards Questionnaire (SOE5)

- 5.1 Where adventurous activities, overseas travel or residential accommodation are provided by an external provider, the SOE5 must be used to confirm the provider meets the required standards. The SOE5 is not required where a provider holds a LOTC Quality Badge.
- 5.2 *The LA does not endorse or approve any providers. But through the SOE5 or LOTC Quality Badge it provides a system by which school leaders can make their own judgement about the suitability of providers.*
- 5.3 The completed SOE5 must be read by the Visit Leader and Headteacher and they must satisfy themselves that the answers provided meet their expectations.
- 5.4 See the document "Guidance on Planning an Off-Site Visit" (Evolve/Resources) for information on how to read an SOE5 stored on Evolve.
- 5.5 It is reasonable that a sole trader should reply 'n/a' to the question regarding their safer recruitment policy if they do not recruit/employ any staff, likewise

not all of the provider's staff may have DBS checks. It is up to the Visit Leader and Headteacher to decide whether to engage the provider. Additional advice can be sought from the Adviser for Outdoor Education.

- 5.6 If an SOE5 for the current calendar year is not already stored on Evolve, a SOE5 should be sent to the provider when making a provisional booking and no deposits should be committed prior to its satisfactory completion and return. The satisfactory completion of the form does not necessarily signify that the service on offer will be appropriate for the young people from your establishment.
- 5.7 A pre-visit to the centre and references from previous users or both will help you to decide if the centre will provide the right service, considering the age, abilities and needs of your particular group.
- 5.8 In particular, the SOE5 does not check the quality of the provision, nor the financial stability of the company.
- 5.9 The SOE5 have a calendar year lifespan, when selecting an existing provider on Evolve, the Visit Leader should ensure they have read the SOE5 and that it is in date.
- 5.10 If the Visit Leader or Headteacher have any questions or concerns about a provider's answers on the SOE5, they should contact the Adviser for Outdoor Education.
- 5.11 Whilst the Visit Leader may rely on a provider or their employee for technical instructions and safety of an adventurous activity, the Visit Leader remains in charge at all times. The Visit Leader cannot delegate their duty of care to a third party.

6. OUTDOOR AND ADVENTUROUS ACTIVITIES LED BY SCHOOL STAFF

- 6.1 This section relates to where establishment staff and other leaders or volunteers operating alongside those establishment staff are leading an adventurous activity themselves. Almost all Category B activities will require a qualified leader.
- 6.2 Activity guidance is provided by individual National Governing Bodies, Local Award Schemes or other Professional Bodies, leaders of all activities should be working within the terms of reference of their award. Please refer to Section 5 commencing on page 67 below.
- 6.3 Leaders of adventurous activities are required to upload their award/s onto their staff profile on Evolve and include that information in the Activity Leader

Form (ALF) on the Evolve Visit Form. No other register of awards is kept by the Local Authority.

- 6.4 The decision as to whether someone is 'competent' rests with the Headteacher. As well as formal qualifications, the Headteacher should make a judgement about their experience, skills and abilities to supervise the activity/group in the planned environment and to provide a high-quality learning experience.

Adventurous Activities Provided by your School

- 6.7 Schools or other educational establishments such as colleges etc. do not require a licence for provision of AALA licensable activities to its own pupils or students.
- 6.8 However, the exemption does not apply where school provides activities to the pupils of another school if payment is involved. For example, if school A (or its pupils) were to pay school B for the provision of licensable activities, then school B would require a licence.
- 6.9 Where there is genuine joint provision and no payment is involved then this would not be a licensable situation. However, irrespective of whether a licence is needed, arrangements should be made to develop a clearly documented risk assessment/ common policy with regards to safety management, including:
- Who is responsible for what aspects of the event?
 - Who is responsible for which pupils?
 - Emergency procedures
 - Safeguarding & DBS checks
 - Informed parental consent
 - Insurance.

Competence to Lead Adventurous Activities

- 6.10 The Visit Leader must be 'competent' to lead any adventurous activities. Under health and safety legislation the employer remains responsible for ensuring staff are 'competent' to carry out their duties. Therefore, the Headteacher on behalf of the governing body must ensure staff or volunteers leading or assisting with adventurous activities are competent to do so.
- 6.11 The Health & Safety Executive and the Adventurous Activities Licensing Agency consider competence to be determined in one of three ways:
1. Externally awarded qualifications (National or Local scheme)
 2. In-house training
 3. Significant relevant experience
- 6.12 Evidence of 1. will usually be an NGB/Local award supported by the appropriate syllabus, and for 2 or 3, a 'Statement of Competence'. Such Statement of Competence should be provided by a Technical Adviser who is qualified to

assess an equivalent award under and NGB/Local scheme.

- 6.13 It is not sufficient for the Headteacher to trust the word of a Visit Leader that a volunteer is competent. The same checks must be undertaken on volunteers as employees. In Law, the employer is responsible for both categories to the same extent.

Evidence of Competence

- 6.14 *At all times, Visit Leaders relying on a local or national award as evidence of competence, must adhere to the specific training, guidance, advice and syllabus of that award.*
- 6.15 EVCs should ensure that staff maintain their own staff profile on Evolve and ensure qualifications and awards are up to date.
- 6.16 EVCs should ensure that where volunteers are used due to their specific qualification or award, they have appropriate notes added to their volunteer profile on Evolve.

7. APPROVAL PROCEDURES

- 7.1 For any off-site activity the authorisation of the Headteacher is required. The establishment must keep a record of these visits and details may be requested by the Local Authority as part of its statutory supporting and monitoring role. The Local Authority recommends that all off-site visits are recorded on Evolve
- 7.2 Visits in Categories B and C must also be endorsed by the Adviser for Outdoor Education via Evolve on behalf of the Local Authority where the Local Authority is the employer or where the governing body is the employer and formally adopts this policy. This requirement applies to academies and other establishments who subscribe to Devon Education Services for this service.
- 7.3 All Category B and C visits **must** be notified through Evolve. Establishments are also encouraged to record all Category A visits (approved within the establishment) through Evolve, so that the establishment has all visits and visits in one place, using one common system.
- 7.4 Where Evolve is NOT used for Category A visits, the establishment must ensure that an equally robust system is used, and records are kept. Evolve enables establishments to:
- share information within the establishment
 - share information with the Local Authority
 - learn from other schools' use of external providers
 - build a record of visits and activities carried out each year

- reduce paperwork
- simplify and speed up approval and endorsement processes
- assist record keeping
- manage health and safety requirements in this area.

7.5 For assistance with the Evolve system please contact the Devon Health and Safety Helpline on 01392 382027 or via email: healthandsafety@devon.gov.uk.

Visit Categories and Approval Requirement

Category A	Category B	Category C
Approved by Headteacher	Approved by Headteacher and endorsed by Adviser for Outdoor Education on behalf of the LA	Approved by Headteacher and endorsed by Adviser for Outdoor Education on behalf of the LA
Examples of visits (If in doubt contact the Adviser for Outdoor Education)		
Residentials that DO NOT include adventurous activities Camping on commercial campsites where pupils will NOT be cooking/using fires Cycling on roads Cycling on trails less than 30minutes from safety Community venues such as village halls etc. Forest School where children are NOT lighting fires or using edged tools Museums & galleries P.E. & swimming lessons Places of worship Skate parks	Day visits or Residentials that DO include adventurous activities Archery Bouldering incl. indoor walls Climbing & Abseiling incl, indoor walls. Coasteering Caving Camping on commercial campsites where pupils WILL be cooking/using fires Camping in remote (wild) locations Expeditions i.e., DofE Fishing at tidal locations i.e., sea/estuaries. Fishing from boats	Overseas Air activities other than commercial flights

<p>Sports fixtures</p> <p>Theme parks</p> <p>Walking in the local community</p> <p>Zoos</p>	<p>Forest School where children ARE lighting fires or using edged tools</p> <p>High Level Ropes courses</p> <p>Horse riding</p> <p>Motor sports</p> <p>Open water swimming i.e., sea/tidal/lakes/rivers etc.</p> <p>Orienteering (other than in school grounds)</p> <p>Paintball</p> <p>Rafting incl. raft building</p> <p>Rifle shooting</p> <p>Skiing & Snowboarding</p> <p>Snorkelling and Sub-Aqua</p> <p>Surfing & Body Boarding</p> <p>Trampolining when using an external provider</p> <p>Walking – moorland & mountain or coastal and countryside environments when part of DofE activities</p> <p>Watersports i.e., kayaking, sailing, SUPing, rowing, water-skiing, windsurfing etc.</p>	
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Required Minimum Timescales for Submission to the Local Authority

- 7.6 Where endorsement of visits is required for Category B and C activities, visits must be submitted to the LA via Evolve.
- 7.7 **Overseas expeditions:** at the planning stage, before a contract is agreed with any external provider. Visits should be notified to the LA at the earliest opportunity even if in draft form. Visit Leaders do not need to wait until everything is 'complete' before starting a visit form. Once the visit form is created a note should be added to the LA advising the LA of the intended destination and provider.
- 7.8 **Overseas visits:** 3 months or more in advance For early oversight, the Visit Leader can add a note to the LA at any time rather than waiting until the form is formally submitted.
- 7.9 **Residential visits involving adventurous activities:** 2 months or more in advance.
- 7.10 **Overnight camping visits as part of Ten Tors of Duke of Edinburgh Award activities:** 2 weeks in advance.
- 7.11 **Day visits including adventurous activities:** 2 weeks in advance.
- 7.12 Please note that where there is any doubt about the appropriateness of a visit please add a note to the 'LA' on the Evolve visit form.

8. PARENTAL COMMUNICATION AND CONSENT

- 8.1 For clarification, parental consent can be considered in three layers:

No Consent Required

- 8.2 In law (*Education Act 2002, section 29*), schools are not required to obtain consent from parents for pupils to participate in off-site activities that take place during school hours and which are a normal part of a child's education, such as local studies and visits to a museum or library etc.
- 8.3 While parents do not have the option to withdraw their child from the school curriculum, it remains good practice to inform parents that a visit or activity is to take place (see 'informing parents' below).

- 8.4 Schools should be aware that asking for consent where it is not needed can lead to some parents assuming they can withhold consent and so withdraw their child from a curriculum visit when this is not the case.

Consent Required

- 8.5 Consent is needed for all visits that are organised by establishments or services other than schools i.e. youth service and fostering. Consent is needed for all visits that relate to nursery age pupils.

Annual Consent

- 8.6 Consent **is** needed by schools for visits taking place outside school hours (early starts, late finishes, weekends and residential) and also for activities taking place both during and outside school hours where it is perceived to involve a higher level of risk, such as a residential, overseas visit or including an adventurous activity.
- 8.7 One-off or blanket consent provides evidence that parents have consented in advance to all visits and activities, which require their consent. However, it is essential that such blanket consent be turned into informed consent prior to any visit.
- 8.8 Therefore, where 'one-off' annual consent is used, parents must be given information about the visit and their child's proposed participation and given the opportunity to withdraw their consent should they not wish them to participate. This can be by a letter to parents about the planned activity.
- 8.9 The letter detailing the visit to parents will be a reminder of consent given and could also be an opportunity to update participant information.

Visit-Specific Consent

- 8.10 While one-off consent can be used for many situations, when consent for a specific visit is required, this must be informed consent, whereby parents are given full details of the planned visit including locations and planned activities.
- 8.11 The Local Authority policy is that schools should gain visit-specific consent for:
- visits including adventurous activities
 - residential visits
 - overseas visits.

Curriculum Visits involving Religious Education or Sex and Relationship Education

- 8.12 Parents have a right to withdraw their children from Religious Education lessons, from collective acts of worship and from some elements of Sex and Relationship Education, but not from the National Curriculum.
- 8.13 This means that parents do not necessarily have the right to withdraw their child from a visit to, for example, a place of worship, if this visit forms part of the school's delivery of the National Curriculum. It is therefore important for Visit Leaders to be clear about the purpose of the visit, including the wider personal, social and cultural benefits and its link to the curriculum.

Informing Parents

- 8.14 Where consent is required, the key is to provide parents with sufficient information to make an informed decision about the participation of their child.
- 8.15 Such information may be given in a variety of ways, as the information needed by parents will depend on the nature and complexity of the visit. For example, regular sports fixtures or cultural visits may involve information being given for the season or for the term ahead with parents being informed of any changes to this as they occur, perhaps by note, phone, email, text etc.
- 8.16 For more complex visits specific information letters will be needed and for the most complex or adventurous visits a combination of written information and briefing/information meetings may be most appropriate.
- 8.17 Many schools use online information/payment/consent systems, whilst others use paper letters/forms. Whichever method is used, it must be accurate, robust and auditable, especially in the event of a post visit investigation.
- 8.18 Inevitably last-minute opportunities will arrive for exciting learning opportunities and the mechanisms for communicating with parents and gaining informed consent should support these. Verbal consent via a telephone call is perfectly acceptable in such a situation (and when parents are unable to give consent in writing), but it would be wise to note that the time and date of the phone call, who made it and who gave consent.
- 8.19 For all visits, parents should be kept informed of arrangements and of any extra safety measures required. See the chart below:

Information to Give to Parents

1	Dates
2	Objectives of visit or activity
3	Times of departure and return, including location for meeting parents
4	Method of travel including name of any travel company
5	Accommodation with address and emergency telephone number (this could be the Visit Leader or SLT member in contact with the Visit Leader), including contact details of host families for exchange visits
6	Emergency contact arrangements, at home and away, if all young people are not at one centre. Consider using a 'telephone tree' to make easy and rapid contact with a large group of parents, for things like changes to transport arrangements
7	Name of Visit Leader and accompanying staff. Clear information where the visit leader is not attending the visit, for example where an external provider or is responsible for supervision
8	Name and status (such as parent or volunteer of other accompanying adults who will have supervisory during the visit
9	Details of activities planned. Any activities involving adventurous activities must be clearly specified
10	Charges or voluntary contributions and what they cover
11	Methods of payment and cancellation arrangements
12	Insurance used for baggage, personal accident, cancellation and medical cover for the group members. Send a photocopy of the insurance schedule to all parents or state that a copy of the schedule can be obtained from the Visit Leader if needed
13	Clothing, footwear and other items to be taken. Prohibited items may need to be highlighted
14	Money to be taken
15	Code of conduct and details about the standard of behaviour expected from the group during the visit, including, where appropriate, rules on general group discipline, smoking, sexual behaviour, illegal substances and alcoholic drinks
16	Parents should complete a medical form for all residential visits and give their written consent for emergency medical treatment

8.20 Parents should be invited to a planning meeting, especially where a residential experience is involved or for visits abroad. This provides the opportunity for everyone to be fully informed and to raise issues which may be difficult to address in writing. For young people over the age of 18 a parental consent form is not needed.

8.21 If a young person is in the care of the local authority their care plan should say who can consent to off-site activities.

9. INSURANCE

- 9.1 Visit Leaders must satisfy themselves that adequate insurance exists for people and property well before an educational visit or off-site activity takes place.
- 9.2 Academies are not insured by the Local Authority. Therefore, Headteachers and other school staff concerned with the approval of visits and off-site activities will need to check whether adequate insurance is in place for the proposed visit.
- 9.3 In addition, the Visit Leader should consider what insurance is provided by other organisations they are involved with, such as a travel firm, landowner or residential centre.
- 9.4 Visit Leaders must not use companies who have no insurance. Please use the SOE5 and check that the company/individual providing the activity is adequately insured (£5m public liability insurance is the minimum acceptable).

Insurance for Visit Cancellations

- 9.5 Headteachers must ensure that any booking terms and conditions are read, and their implications are fully understood. This applies to all forms of visits; day, residential and overseas.
- 9.6 During the Covid-19 pandemic of 2020 many schools found themselves presented with invoices for visits that were cancelled by the provider. Schools should ensure they have adequate insurance for visits that are cancelled for reasons beyond their control.
- 9.7 For more information about the cover currently provided by the Local Authority please refer to:

Devon: The Insurance Manager, Room G16, County Hall, Exeter, EX2 4QD.
Phone 01392 382292.

Torbay: The Insurance Manager, Licensing Litigation and Insurance Team,
Torbay Council, Castle Circus, Torquay, TQ1 3DR. Phone 01803 207174.

10. WAIVERS AND INFORMED CONSENT

- 10.1 Teachers must not sign providers' consent forms on behalf of parents/guardians; if the provider's terms and conditions of bookings require informed consent forms to be signed by parents/guardians, they should be forwarded to parents/carers with an explanatory letter from the establishment.

- 10.2 Some providers ask group members (or their parents or guardians) to sign a document before taking part in certain activities (most commonly when dealing with trampoline parks, paintball activities, pony trekking and Go-cart activity providers).
- 10.3 Such documents are often referred to as a 'Waiver', 'Disclaimer' or 'Consent Form'. There is often misunderstanding of the legal position from both the provider and the Visit Leader as to what legal status such documents have.

Informed Consent

- 10.4 It is reasonable - and indeed preferable - for a provider to highlight any particular hazards or risks that an activity may represent and clearly explain these to participants (or their parents or guardians). This is acceptable as it does not set out to limit the provider's responsibility, nor ask the participants to 'waive' their rights. This is considered informed consent.

Waivers and Disclaimers

- 10.5 Conversely, a 'Waiver or 'Disclaimer', is where a provider is effectively trying to avoid any responsibility for accidents or claims in any circumstances. Such documents should not be signed. These documents have no legal status as the provider cannot absolve itself or its legal responsibilities in law.
- 10.6 However, by asking participants to sign a waiver it demonstrates that the provider is not prepared to take full responsibility for their staff or service; such providers should be avoided.
- 10.7 Contact the Adviser for Outdoor Education if you have any queries relating to forms the school/parents are asked to complete by Providers.

11. SUPERVISION/RATIOS

- 11.1 There are many variables which govern appropriate staffing/pupil ratios. A common acronym for managing this area is **SAGE**: Staff, Activity, Group, Environment.

Staff	<ul style="list-style-type: none"> • Why these staff? • Staff competence/qualification/training • The consequence of a member of staff being indisposed, particularly where they will be the sole leader with a group for any significant time, or where
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	the group is remote from the school such as an overseas visit
Activity	<ul style="list-style-type: none"> • Why this activity? • The nature and purpose of any planned activities • The nature and duration of the visit and the planned activities • Travel to and from
Group	<ul style="list-style-type: none"> • Why this group? • The nature of the group including the number of young people and their age, level of development, gender, ability and needs (behavioural, medical, emotional and educational)
Environment	<ul style="list-style-type: none"> • Why this place? • The location and environment in which the activity is to take place • The type and appropriateness of accommodation • Supervision requirements required by airlines/travel companies

- 11.2 Staffing/pupil ratios are a risk-based judgement and should consequently be determined through the process of risk assessment. It is not possible to set down definitive staff/pupil ratios for all visits. Therefore, the following ratios should be considered as a starting point for consideration rather than being definitive.
- 11.3 If the LA recommended ratio is exceeded, an explanation should be put in the SOP 'enhanced risk assessment' column.
- 11.4 *The Local Authority policy is that there should be at least two adults on all visits.* However, where there is only one adult supervising a visit (i.e. PE fixtures at another school), the Visit Leader/Headteacher must consider the implications and annotate the reasons why one member of staff is acceptable. This should be recorded in the SOP's enhanced risk assessment' column.
- 11.5 When staff are 'lone working' with pupils they should consider what advice is given to pupils in the event of the Visit Leader becoming incapacitated. For secondary age pupils it may be appropriate to use an advice sheet kept in a minibus or leader's rucksack. An example can be found at: Evolve/Resources/Guidance & Policies/Emergency Action/Teacher Down.

Local Authority MINIMUM Recommended Ratios:

- 11.6 **Early years Foundation Stage (0-5 years inclusive):** As specified in the Early Years Foundation Stage Statutory Framework. Please refer to: [Early years foundation stage \(EYFS\) statutory framework - GOV.UK \(www.gov.uk\)](http://www.gov.uk/government/uploads/system/uploads/attachment_data/file/322222/early_years_foundation_stage_statutory_framework.pdf)
- 11.7 The appropriate ratio on a visit is likely to be higher than the legal minimum required for on-site supervision, but this should be based on the risk assessment, type of visit, qualification of the teacher, age of the pupils and pupils' needs.
- 11.8 **6 years and over for Category A visits:** Recommended minimum ratio of 1 adult to 15 group members.
- 11.9 There may be occasions, particularly in the use of school transport, journeys between school sites or in the neighbourhood of the school, where the above ratio may reasonably be changed as decided by individual Headteachers, based on an assessment of risk. Headteachers should be able to justify their ratio decision.
- 11.10 **6 years and over for Category B visits led by external providers:** A minimum ratio of 1 adult to 15 group members.
- 11.11 **6 years and over for Category B visits led by establishment staff:** Minimum ratios for specific adventurous activities led by establishment staff in Section 5.
- 11.12 For other non-specified activities, guidance on ratios may be determined through risk assessment and advice sought from the Advisor for Outdoor Education (via Evolve) but will generally not exceed 1 adult to 10 group members.
- 11.13 **6 years and over for Category C visits:** A minimum ratio of 1 adult to 10 group members.
- 11.14 **Ratios for special needs provision:** A minimum ratio of 1 adult to 6 group members is recommended subject to the Visit Leader's own risk assessment based on their knowledge of the needs of the pupils and the activity.
- 11.15 The Educational, Health & Care (EHC) plan for each young person who has special needs will help to determine the degree of additional support they need for off-site activities. Young people with special needs, like all young people, should be encouraged to participate in as rich a variety of outdoor education as possible.
- 11.16 When young people with special needs are working with external providers, for

example at an outdoor centre:

- allow sufficient time for discussion and outlining procedures – activities may need to be explained one step at a time, making clear what is expected of participants
- the respective roles of the group leader and the instructor may need to be discussed prior to an activity
- external staff will need to be informed of the special needs of group members
- a procedure with the instructor should be established for withdrawing any participant if needed
- close attention should be given to medical and dietary needs and any emergency medical procedure – a system of communication may need to be agreed between staff and participants.

Improved Staffing Ratios

- 11.17 Any alteration to the recommended ratios and staffing outlined above should be informed by risk assessment and recorded in the enhanced risk assessment column of the SOP.
- 11.18 Where the children of staff members are also on the visit, consideration must be given to any possible conflict of interest. Ideally, children of staff should be of the same age and ability as the rest of the group, and able to join the programme as a full member.
- 11.19 Where this is not the case, supervision of these children should be undertaken separately to the rest of the group, and the staff to participant ratio adjusted accordingly. This should be noted in the 'enhanced risk assessment' column of the SOP for the visit.
- 11.20 The Local Authority recommends that if children of staff members are on the visit, then that staff member should not be the Visit Leader.

Definitions of 'Supervision' by the Visit Leader and Accompanying Adults

- 11.21 **Direct supervision** is where an adult (staff or volunteer) is in close proximity with a pupil/group.
- 11.22 **Indirect supervision** is where pupils are unaccompanied by an adult (staff or volunteer) but said adult is in the vicinity; for example; in a museum, or "down-time" at an activity centre. As pupils age and gain more responsibility, the distance and length of time they are under indirect supervision can be extended. This decision must be made by the Visit Leader and confirmed by the Headteacher and included in the SOP/enhanced risk assessment.

- 11.23 **Remote supervision** is a term specific to adventurous activities such as moorland walking where an adult is a significant distance away from the group (often in remote environments) and are not able to aid immediately. The decision when and how to remotely supervise groups during adventurous activities must be made by the Visit Leader as part of their risk assessment and should be progressive based on pupils proven ability and confirmed by the Headteacher as part of the approval process.

Supervision by Support Staff (establishment employees)

- 11.24 The extent of support staff involvement will depend on a risk assessment of the activity and the competence of the support staff in managing young people and their expertise in specific activities which would include any relevant prior experience, training or qualifications they may hold.
- 11.25 Support staff should not be given responsibilities beyond their competence and their responsibilities. Specific roles and responsibilities should be outlined in the 'enhanced risk assessment' column of the SOP for the visit.
- 11.26 Support staff should be fully involved in planning, organisation and risk management of the visit.

Supervision by Volunteers

- 11.27 Volunteers can be an essential part of the visit. Either to improve supervisions ratios i.e. parents supporting primary school visit to a venue such as a zoo or museum etc. or due to the volunteer holding a specific leadership award such as mountain leader etc.
- 11.28 Volunteers should be appropriately briefed on the nature of the visit and the needs of the group, and where appropriate their input should be sought into the management of the visit including risk management. The Visit Leader should ensure that any volunteers' involvement is in line with the establishment Safeguarding Policy, including DBS checks where necessary.
- 11.29 **Duke of Edinburgh Award 'Assessors' must not be included within the staff supervision ratios. Duke of Edinburgh Award Assessors must not be relied upon as a 'competent person' in terms of a qualified leader. Whilst they may hold relevant walking leader awards their role as an assessor is separate from the establishment leadership team. The establishment leadership team should consist of sufficient qualified leaders for the number of students in addition to any assessor. Please refer to Section Five: Adventurous Activities led by School Staff for specific activity ratios.**

11.30 The Headteacher must ensure the appropriate steps have been taken as part of the authorisation process.

Supervision by External Providers

11.31 In exceptional circumstances schools may request external providers to carry out the supervision of pupils including overnight, such as when the school does not have qualified staff to lead, or available to support an activity such as DofE. In these exceptional circumstances the school retains its Duty of Care and the following **MUST** be done:

- A named Visit Leader is responsible for the planning and organising of the visit
- The Visit Leader specifies the supervision arrangements within the 'enhanced risk assessment' column of the SOP for the visit.
- The Visit Leader completes the Evolve Visit form and submits for approval
- Parents are informed that no school staff will be present, and supervision will be carried out by an external provider
- Parents are informed that the school retains responsibility for pupil's safety
- A supervision plan is drawn up and agreed by both parties (in writing) and it is a condition of the contract
- The school issues the provider with relevant medical, behavioural or dietary needs of pupils along with emergency home contacts
- The school provides parents with an emergency contact for the provider and Visit Leader.

12 FIRST AID

12.1 First aid requirements form part of the risk assessment for off-site activities. A named member of staff or volunteer must be a person responsible for first aid arrangements such as:

- Ensuring sufficient and suitable first aid kits are available
- Managing first aid situations
- Reporting on any first aid situations to the employer.

12.2 Whether the visit requires a qualified first aider will depend on:

- Known medical needs of pupils (and adults)
- Proximity to emergency medical help (environment/locality/urban/remote)
- Type of activity: adventurous or activity of normal daily life.

- 12.3 The level of first aid award held will also be dependent on the above factors but where a first aid award is deemed necessary, it should be at least Emergency First Aid at Work.
- 12.4 Where pupils with specific medical conditions such as anaphylaxis, epilepsy, diabetes etc. it may be necessary for particular staff to have additional training. This decision is part of the risk assessment process and should be informed by the contents of the young person's Individual Healthcare Plan (IHCP).
- 12.5 There is a legal requirement for a first aider trained in Paediatric First Aid to be present for all visits involving pupils up to 5 years of age.
- 12.6 A valid first aid certificate is a pre-requisite for many outdoor leadership qualifications for example Mountain Leader Training England, Royal Yachting Association, Canoe England or South West Mountain and Moorland Leader Training Scheme.
- 12.7 Staff leading adventurous activities must ensure that their first aid award is valid (current) and that a copy is uploaded to their Evolve staff profile.
- 12.8 The Dartmoor Centres provide 'First Aid for the Outdoors' courses under the remit of Mountain Medicine. These courses are specifically geared towards the outdoor environment. Full details of these awards from: www.dartmoorcentres.co.uk/training
- 12.9 For all activities and the associated journey, an appropriate first aid kit should be available, and its stocks regularly replenished. The Visit Leader and other staff should be aware of its contents and know how they should be used. All staff should know how to contact the emergency services in this country (or abroad where applicable).

13 TRAVELLING ARRANGEMENTS

Managing Groups when Travelling

- 13.1 The level of supervision required in a vehicle should be considered as part of the overall risk assessment process.
- 13.2 The transport needs of young people with special educational needs or a medical condition should be assessed. This will help determine what type of supervision, what equipment and what type of vehicle is needed to transport the young person.
- 13.3 If a vehicle needs to stop in an emergency the occupants of the vehicle should remain together under the direct supervision of a responsible adult until assistance arrives. The group leader should normally evacuate the vehicle and

move the group to a safer position well away from moving traffic such as behind the safety barrier on a motorway.

- 13.4 Your establishment's specific SOP should describe the control measures needed for travelling by foot, car, ferry, air, public transport or coach.

Using Teachers' or Parents' Cars for Transporting Pupils

- 13.5 Your establishments specific SOP should describe the control measures needed for using teachers' or parents' cars for transporting pupils.
- 13.6 A draft letter and declaration for schools and other establishments to send to staff, parents and volunteers who use their cars to transport pupils is available at Evolve/Resources/Forms.
- 13.7 Advice on seatbelts and child restraints can be found for Devon establishments in HS56/HSA56 Transport Arrangements and for Torbay contact the Health & Safety Team on 01803 207170.

Use of Minibuses

- 13.8 The use of minibuses by schools and who can drive them is often misunderstood. Please refer to:
[Driving school minibuses advice: schools and local authorities - GOV.UK \(www.gov.uk\)](http://www.gov.uk/government/guidance/driving-school-minibuses-advice-schools-and-local-authorities)

Hire or Reward

- 13.9 A vehicle which is operated for hire or reward is one where payment is made, in cash or in kind, for the carrying of passengers, or matters which include the carrying of passengers, irrespective of the person to whom the payment is made. This includes direct payments such as a fare or an indirect payment which gives a person an opportunity to travel. It does not matter whether or not the operator is a profit-making entity. A minibus is used for hire or reward if there is a clear and logical link between payment and the transport provided and that link is not too remote.
- 13.10 Therefore, the majority of school visits using minibuses are deemed to be 'for hire and reward' as money has changed hands (parents have paid for children to go on the visit) and as part of that visit a minibus is used. There does not need to be a specific charge for the minibus.

Section 19 Permits

- 13.11 These permits allow the holder to operate transport services for 'hire or reward' without the need for a full public service vehicle (PSV) operator's licence. Please refer to:

[Application for a standard or large bus permit \(PSV372\) - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/application-for-a-standard-or-large-bus-permit-psv372)

- 13.12 A separate permit must be applied for and displayed in each minibus the school 'operates' (whether owned, hired or borrowed). Where establishments occasionally hire additional minibuses, spare permits should be obtained. The permit does not relate to who owns the vehicle, but who is operating it.
- 13.13 In normal traffic, the likelihood of the Police noticing the absence of a Section 19 permit on the windscreen may be low. However, if a vehicle accident should occur on a visit that is for Hire & Reward (see above) and no Section 19 permit is on display, the Police may seek to prosecute the driver and school.
- 13.14 Likewise, if any insurance claim is made and, when the insurance company's loss adjustor inspects the vehicle, the absence of a valid Section 19 Permit may invalidate your insurance.
- 13.15 The Local Authority no longer issues Section 19 permits to schools, so LA maintained, academies and independent schools must use the link above to apply for a licence for each minibus they operate. These permits only apply within the UK. See driving a minibus abroad below.

Driving Licence Categories

- 13.16 In order to see what vehicles you can drive, use this link: [Vehicles you can drive - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/vehicles-you-can-drive). Also see Appendix 3: who can drive a minibus?

Driver Competence

- 13.17 Whilst a person may hold a licence allowing them to drive a minibus, it is up to the Headteacher to ensure they are 'competent' to do so. A person may have passed their driving test several years ago but have only ever driven a small car or not driven a minibus at all.
- 13.18 Headteachers have a legal duty to provide appropriate training for staff to 'carry out their duties'. To this end, additional minibus driver training is recommended. To get additional training in driving minibuses from Red One: [Red One Driver Training | Driver Training | Westpoint Exeter \(red1drivertraining.co.uk\)](https://www.red1drivertraining.co.uk)
- 13.19 Any Devon County Council member of staff or volunteer driving any minibus on a school journey must be a council approved minibus driver, through having satisfactorily completed the minibus test or obtaining a PCV driving licence prior to driving passengers in a minibus. Refresher training must also be done every four years. Reference should be made to the HS56 Transport Arrangements Note.

- 13.20 Torbay Council staff must first be authorised to drive a minibus on official school business. To do this, please contact the SWISCo Fleet Office who will check the status of your licence, ensure that you either have a DCC minibus driving certificate or a CPC, provide you with an hour-long driving assessment and arrange for you to complete a driver's declaration. Upon satisfactory completion of this process you will then be an authorised driver and subject to annual driver licence checks.
- 13.21 Requirements for academy owned or operated vehicles will be determined by individual establishments in accordance with their insurance company requirements and or employer policy.

Vehicle Loading on Minibuses and Other Vehicles

- 13.22 The driver is responsible for any load carried. There must be uninterrupted access to all doors. Luggage and equipment must not block gangways or doors or access to them. Doors must be left unlocked when the vehicle is carrying passengers.
- 13.23 The balance of the vehicle must also be considered, particularly when roof racks or trailers are used. The manufacturer's maximum permitted weight must not be exceeded. Drivers should consult the manufacturer's guidance or the school transport manager for advice. Also refer to: [Vehicle weights explained - GOV.UK \(www.gov.uk\)](http://www.gov.uk).

Towing

- 13.24 Passengers should not be carried when towing a trailer if the emergency doors (the second doors in addition to the normal access door) are rear facing, as in the event of an accident the trailer is likely to block the emergency doors. Any minibus carrying passengers while towing should have a separate emergency door fitted at the rear offside or roof if necessary, in addition to rear facing doors.
- 13.25 Note that drivers must comply with driver licensing requirements for towing trailers. Drivers who are driving a minibus on a category B (car) licence under a Section 19 Permit are not allowed to tow. Please refer to: [Requirements for towing trailers in Great Britain \(INF30\) - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

Taking a Minibus Abroad

- 13.26 The law relating to driving a minibus abroad is significantly different to that within the UK. Where the visit is for 'hire and reward' (as specified above) the driver must hold a full PCV licence (D1 without 101 restriction) gained by passing a separate DVLA driving test (not a certificate of competence test).

- 13.27 For this reason alone, it is unlikely that school staff will be entitled to drive a minibus abroad. If staff (or volunteers) do hold a full PCV licence, there are considerable demands placed on the driver and establishments to meet additional vehicle and documentation requirements. Including the establishment holding a Public Service Vehicle Operator's Licence.
- 13.28 If you intend to take a minibus abroad on a school journey, please contact the Advisor for Outdoor Education.
- 13.29 Devon County Council maintains an Approved Bus and Coach Operators List to enable schools to identify operators who are able to provide vehicles and drivers to a minimum standard at all times. This includes seatbelts on all seats and drivers who are DBS checked to the enhanced standard.
- 13.29 For more information for Devon, phone: 01392 382886.
- 13.30 For more information for Torbay: visit www.torbay.gov.uk/schooltravelsupport
Email: cstransport@torbay.gov.uk or phone: 01803 207685.

14 MONITORING

- 14.1 The Headteacher and the EVC should ensure that there are suitable arrangements to monitor educational visits and off-site activities so that they have a sound picture during those visits and activities. This may include:
- Identifying the learning outcomes and their place within the school curriculum
 - More detailed discussion with the Visit Leader and other staff about proposed plans on a sample basis
 - Identifying a senior member of staff who may accompany visits on a sample basis to observe some or all of the provision, to help identify areas of good practice and areas for improvement
 - Reviewing the outcome of visits with the Visit Leader to discuss outcomes and any incidents which may have occurred.
- 14.2 The document; "Planning Checklist for Visits and Off-Site Activities" can be found at Appendix 1 and can be used by the Headteacher or Governing Body to monitor or audit the school processes and procedures.

SECTION THREE

15 ADVICE AND GUIDANCE FOR SPECIFIC VISITS AND ACTIVITIES

15.1 Certain types of visit require more detailed planning and may require specific staff competency or qualifications. Advice on the following types of visit can be found below:

- Safety at the water margins
- Beach and coastal safety
- Swimming in open water i.e. sea/tidal/lakes/rivers etc.
- Swimming in private pools i.e. hotels/campsites etc.
- General guidance for all water-based activities
- Walking in non-remote environments
- Educational visits to farms, wildlife parks and animal sanctuaries
- Sponsored walks and large-scale events
- Residential visits
- Trampoline parks
- Theme parks, water parks, funfairs etc.
- Visits abroad
- Ski visits abroad
- Overseas expeditions
- Tour Operators
- Exchange visits
- Air activities other than commercial flights
- Boating i.e. rowing, water-skiing, jet ski, fishing from a boat, etc.
- Camping in non-remote (wild) locations
- Cycling on roads or non-technical trails
- Surfing
- Coaststeering
- Stand Up Paddle Boarding
- Horse Riding/Pony Trekking
- School team entry to sporting events at parent's request.

Safety at the Water Margins

15.2 A high level of vigilance and supervision is needed when close to any stretch of water, even shallow water. The sea and tidal areas need extra care and attention.

15.3 **River Crossings:** when walking expeditions involve the crossing of rivers particular care needs to be taken, especially if pupils are remotely supervised i.e. Ten Tors or DofE expeditions. Pupils should be taught how to risk assess a river crossing, along with appropriate crossing techniques. Of greatest

importance in risk assessing a safe crossing point is the consideration of what will happen if pupils fall in.

- 15.4 If there is any possibility that participants will be swept away or fully submerged a different crossing place should be sought.
- 15.5 Participants should not need to loosen or remove rucksacks in order to cross safely. Indeed, the loosening of rucksacks will make them less stable and more likely to cause imbalance leading to a fall. The Awarding Bodies' current syllabus and guidance should be closely followed, and further advice should be sought from the Adviser for Outdoor Education.
- 15.6 **Sea Paddling:** either on its own or as part of rock pooling or pond dipping may be permitted where there is no intention of swimming and, there is no likelihood of individuals being beyond the direct control of supervising adults. This is provided that risks have been fully assessed and there is adequate supervision.
- 15.7 Paddling is always with clothes ON (not a swimming costume), in water lower than the child's knee.
- 15.8 Good practice should include adults standing at the boundaries of the safe supervised area, for beaches this would be both out to sea and along the shoreline.
- 15.9 It is recommended that adults each have responsibility for a small group, rather than all adults having oversight of all pupils. Closer supervision may be required where rocks or vegetation obscure adults' vision.
- 15.10 Relevant training is provided by The Royal Life Saving Society under their Water Safety Management Programme. This is a modular programme including theory sessions about water safety and practical rescue methods. Participants need not complete all modules. Please refer to: [The RLSS UK's National Water Safety Management Programme \(NWSMP\)](#).
- 15.11 The guidance document 'Group Safety at Waters Margins' has been updated by the OEAP and is aimed at anyone who organises learning activities that take place near or in water such as a walk along a riverbank or seashore, collecting samples from ponds or streams, or paddling or walking in gentle, shallow water. This booklet remains a good source of advice and guidance, and is available for download at: [Contents | \(oeapng.info\)](#)

Beach and Coastal Safety

- 15.12 The local beaches and coastal areas offer a wide range of opportunities for study and activities. However, whilst presenting many opportunities and interests, areas where the land meets the sea present their own hazards.
- 15.13 When planning activities in coastal areas consider:
- tides, swell, wind, currents, beach profile and sandbanks
 - exit routes checked in advance and at all times during the activity.
- 15.14 Beaches present their own problems, particularly when large numbers of the general public are present:
- establish a base where members of the group must return if separated from the rest
 - look out for warning notices and flags
 - be aware of the possible presence of dangerous debris such as glass, syringes, sewage, barbed wire or hazardous litter
 - digging in the sand, particularly in cliffs or dunes could cause cave-ins
 - climbing on rocky beaches and cliffs should be discouraged. Do not work or base groups under such sites or allow young people to knock down or throw stones
 - seaweed covered rocks may make surfaces slippery
 - be prepared to seek advice from the Coastguard, the RNLI or from the LA via notes on Evolve visit forms.

Swimming in 'Open Water' (i.e. sea/tidal/lakes/rivers etc.)

- 15.15 Outdoor swimming is an enjoyable but potentially hazardous activity. It may involve swimming in the sea, a lake or river. The use of recognised bathing areas will reduce potential hazards. See also the section on Beach and Coastal Safety above. The details below apply to activities in the UK and abroad.
- 15.16 ***Lifeguard patrolled beaches:*** the visit or group leader from the school must hold a minimum of the National Vocational Beach Lifeguard Qualification or equivalent. The group must follow the advice of the lifeguards and stay within the supervised area. Note that the role of the lifeguard complements, rather than replaces, the role of this qualified member of staff, unless specific agreement has been reached with the lifeguard that they are able to supervise your group.
- 15.17 ***Beaches with no lifeguard present:*** the leader must hold a minimum of the National Vocational Beach Lifeguard Qualification or equivalent. Only known safe swimming beaches should be used. Leaders must consider the limitations

of their own experience and competence. They must ensure that the prevailing conditions are suitable both for themselves to act as the lifeguard and for the ability of the group.

- 15.18 **Lakes, rivers and canals:** swimming in these environments presents particular risks in terms of depth, temperature and access which must be carefully assessed beforehand and to gain local information about any dangers. The leader must hold a minimum of the RLSS Open Water Lifeguard or equivalent and be capable of a rescue from the deepest part of the swimming area.
- 15.19 In all cases the leader must be aware of the limitations of their own experience and competence. Where splash-about swimming takes place, for example at the end of a canoeing or sailing session, the lifesaving and supervision should be provided by the canoeing or sailing instructors, provided that the swimmers wear a buoyancy aid.
- 15.20 Recommended minimum staffing ratios - 1:10 (Minimum 2 adults at all times)
- 15.21 A competent member of staff must be land-based observing the group at all times. Leaders should consider the merits limiting the number of swimmers in the water at any one time and keep swimmers within their depth.
- 15.22 Leaders should be aware of the effects of sudden immersion in cold water. The leader should assess the risks posed by the prevailing conditions: for example, surf and tide, the weather, currents, wind, undertows, cold, weeds, submerged objects, fencing, polluted water and the stability of the sea or riverbed. Leaders should also get local information where possible.
- 15.23 An area of operation should be designated, and the leader should know the commonly used signals of distress and recall. A signal system should be adopted. For example:
- to gain attention is one blast of the whistle
 - to clear the swimming area is two blasts of the whistle.
- 15.24 The leader should have appropriate rescue equipment to hand such as a throw line, a buoyant rescue device or something for a struggling swimmer to hold onto. The use of a throwline effectively requires prior practice or formal training.

Swimming in Private Pools (i.e. hotels/campsites)

- 15.25 The LA recommends only using pools where a professional lifeguard is employed.
- 15.26 School staff/volunteers can only supervise swimming in private pools where:
- maximum water depth less than 1.3 metres
 - the supervising adult holds an up to date first aid award
 - the swimming supervisor is only responsible for supervising swimmers
 - other adults are present to supervise group member not swimming.
- 15.27 In all cases, the leaders should be fully aware of the emergency procedures for the site.
- 15.28 All members of the group should be competent swimmers in the light of the conditions and the degree of supervision. It is worth noting that young people who drown are often strong swimmers.

General Guidance for all Water-Based Activities

- 15.29 The local area provides rich opportunities in the natural environment for pupils to participate in a wide variety of water-based activities. However, there are obvious hazards, so qualifications and codes of practice developed by the National Governing Bodies, including the Royal Life Saving Society (RLSS), Royal Yachting Association (RYA) and Canoe England, provide important safeguards for sound and safe participation.
- 15.30 The obvious greatest danger in any water sport is drowning and being immersed in cold water is a major contributing factor in drowning fatalities in this country.
- 15.31 **Weather forecasts:** leaders should obtain a recent forecast prior to the activity and check for changing conditions during the activity. Off shores winds are a particular hazard. Current weather forecasts should be sought before any water-based activity. The BBC site has a special marine section:
[Coast and Sea - BBC Weather](#)
- 15.32 **Additional controls and safety factors:** when using a watercraft such as a canoe, SUP, rowing boat etc. A Personal Flotation Device (PFD) – such as a buoyancy aid or lifejacket (suitable for the activity) must be worn at all times by group members and leaders. Surfing is an exception to this, see the specific surfing guidelines. The leader must know the appropriate buoyancy aid or life jacket to suit the specific activity, individual and location. All PFDs must comply with appropriate current standards.
- 15.33 National Governing Body web sites include details of current standards. The

- buoyancy aid must fit, be in good condition, and be checked periodically to ensure it remains fit for purpose.
- 15.34 Helmets should be worn according to National Governing Body guidelines for the activity, and a local risk assessment.
 - 15.35 All boats and boards should be in a good condition, have adequate buoyancy, and be suitable for the activity and the right size for the participant. It is the responsibility of the leader to check all equipment before the activity.
 - 15.36 Clothing must be suitable for the conditions and spare clothing should be carried or readily available. Wet suits or dry suits may be appropriate in certain circumstances. Footwear should normally be worn for water-based activities. Surfing may be an exception.
 - 15.37 First aid equipment and appropriate emergency equipment must be carried or be immediately to hand (in the safety boat) at all times. All leaders of water activities must have a current first aid award appropriate to their National Governing Body qualification and to the environment they are working in.
 - 15.38 Weather and water conditions can make normally safe areas unsafe. Leaders should be aware that all levels 'normal water and weather conditions' are implied. The leader should also be aware of riptides, currents, the particular effects of wind in that area, and relevant local bye laws.
 - 15.39 The Visit Leader is always responsible for the whole group. The leader should leave details of their activity with a responsible adult on shore, with instructions for action to take if the party is late.
 - 15.40 Visit Leaders need to take common sense precautions for water quality. Using recognised sites will minimise risks. Cuts should be protected with plasters. It is good practice to shower after water-based activities. Should illness or 'flu-like' symptoms develop immediately or after a few days, participants should consult a doctor as this could be a symptom of Weil's Disease and should be reported.
 - 15.41 Individuals taking part in adventurous water-based activities should normally be able to swim 50 meters in light clothing. Discretion may be exercised, in accordance with the instructor's training and experience, where special circumstances exist. Water confidence for the proposed activity may be more appropriate than the ability to swim 50 meters. In addition, trained instructors working in a controlled environment may safely introduce some non-swimmers to such activities.

Walking in Non-Remote Environments

- 15.42 “Non-remote” is defined as the group being no more than 30 minutes (group walking speed) from a road or refuge at all times during the activity.
- 15.43 Therefore, many countryside and coastal activities fall within Category A and no specific leadership qualification is required.
- 15.44 However, the Visit Leader will need to take note of additional hazards when supervising groups in such environments. Hazards in coastal or tidal areas should not be underestimated even if close to habitation and the Visit Leader must be suitably competent to lead the activity, as determined by the establishment’s Headteacher.
- 15.45 The Visit Leader should have visited the location and walked the route or should have sufficient knowledge or experience to be able to address any unexpected problems, i.e. blocked footpath, eroded cliff path etc.
- 15.46 There is a significant difference between a primary school walk through farmland and secondary school bronze Duke of Edinburgh Award Expedition walk, though they may take place in exactly the same environment. Therefore, the purpose, duration, age of participants and outcomes must be considered in determining the Visit Leader and accompanying staff competence and/or qualifications.
- 15.47 Expeditions that form part of DofE or Ten Tors training are classed as Category B even when in non-remote country. This is due to the additional skills required of the Visit Leader/Adults to teach navigation/hill craft and to ensure the leader/s are competent to make judgements about remote supervision. To ensure competence for these activities, leaders will need to hold an appropriate ‘Walking Leader’ Award.
- 15.48 The Duke of Edinburgh Award Scheme has its own separate ‘rules’ for leader qualifications dependent on the terrain/activity, contact your local DofE Award Officer for more information.
- 15.49 DofE supervision ‘rules’ are in addition to the LA requirements. When DofE expeditions are organised by the school, the over-arching principles of health & safety law and LA policy apply, and the Headteacher retains responsibility throughout.
- 15.50 **Primary age groups:** Visit Leaders must include additional safety factors/controls within the enhanced risk assessment of the SOP.
- 15.51 **Secondary age groups:** for DofE and Ten Tors activities in non-remote country, the Visit Leader must complete an ‘adventurous activity specific’ risk

assessment addressing additional safety factors/controls relating to the activity, in addition to the SOP (which needn't cover these points again).

Educational Visits to Farms, Wildlife Parks and Animal Sanctuaries

- 15.52 Visits to working farms are a regular feature of education for young people from both rural and urban environments. Such visits are beneficial to young people, helping them to appreciate the origin of their food and learn about aspects of rural life.
- 15.53 The Countryside Educational Visits Accreditation Scheme (CEVAS) accredits farm staff who are working with school groups and endorses the farm premises as being appropriate for school visits. See:
- [Farms for Schools - countryside, environmental, sustainability, conservation and farming education](#)
 - [Access To Farms Home Page | Access To Farms \(visitmyfarm.org\)](#)
- 15.54 The Learning Outside the Classroom (LoTC) Quality Badge is available to farms through the CEVAS scheme. Farms that do not provide adventurous activities are not required to complete a SOE5. However, the farm should confirm they hold appropriate public liability insurance, (minimum £5 million).
- 15.55 The Visit Leader should carry out a pre-visit to identify specific hazards and control measures as well as to consider learning objectives.
- 15.56 Farm visits can carry a small risk to young people of acquiring infection, particularly gastroenteritis. Several micro-organisms are commonly present in livestock animals and may cause gastroenteritis in humans. They may be found in faecal droppings and elsewhere in the farm environment. In addition, pupils' fingers may become contaminated with animal faeces which is then transferred to their mouths when eating or simply sucking their fingers or thumbs.
- 15.57 Particular care must be taken by expectant mothers if visiting farms during lambing season.
- 15.58 The risk assessment for the visit should consider any medical issues and allergies of the participants.
- 15.59 Farm visit infection and prevention measures:
- 15.60 Risks can be mitigated primarily by simple hygiene measures which, if followed, will help ensure the visit is well-managed and safe. Parents, teachers and young people should be made aware of these measures. They should be re-emphasised both before and during the visit. These measures are:

- Wash hands thoroughly after contact with the animals, after touching footwear and before eating or drinking anything. Hands should be washed with warm water and soap. Hand sanitisers alone are not sufficient.
- Avoid touching faces or putting fingers in mouths while in farm environments.
- Cover any cuts and grazes with a waterproof dressing.
- Pupils should be closely supervised if direct contact with animals is likely. Don't let children kiss farm animals or allow children to put their faces close to animals.
- Where possible, clean or clean/change footwear before leaving. The site should have facilities to clean footwear as you leave the site. Clean pushchair wheels as well.
- Wash hands thoroughly with soap and water again after any cleaning and/or changing footwear.

15.61 If anyone who took part in the visit shows signs of illness (e.g. sickness or diarrhoea) up to 2 weeks after a farm visit, advise them or their parent/guardian to contact their doctor and explain that they have had recent contact with animals.

15.62 The UK Health Security Agency (UKHSA) have also made the following videos explaining ways to stay safe on farm visits:

- [UKHSA farm infection risk advice video](#)
- [Farm visit safety video](#)

15.63 In addition, young people should not sample, taste or take away any animal feed stuff or raw milk or drink from farm taps.

15.64 Farmers and visit organisers need to be aware that visitors may be more susceptible to infection from the farm environment and its products than are those who live in that environment.

15.65 All parties should be aware of moving machinery, such as tractors, and do not allow pupils to touch any machinery or tools unless part of a directly supervised and risk assessed activity.

Forest School Activities

15.66 Forest School activities have developed over the past three decades and offer a wide range of outdoor activities for children of varying ages. They offer a wide array of benefits to children including social and physical / health. They also encourage engagement with learning for those children who may not respond to conventional classroom-based literacy and

numeracy. Importantly, these activities provide children with the opportunity to challenge themselves whilst having fun and exercise. It builds a child's self-confidence but also allows them to engage with, and assess, risk. Typical activities include:

- Sensory walks
- Foraging
- Mini beast hunts
- Tree climbing
- Fire building and lighting
- Campfire cooking
- Shelter building
- Using knots and lashings
- Woodwork using edged tools
- Nature art
- Games (like Hide and Seek, puddle-jumping)

15.67 Nevertheless, in the context of these activities being part of a school's curriculum offer, the obligations under health and safety statutes and the common law duty of care will apply, so careful thought and planning is needed. This planning begins with the application of risk assessment methodologies.

15.68 The risk assessment must include the careful consideration of the location and other contextual factors of the proposed Forest School. For example, each Forest School will have differing facilities and activities and these must be assessed accordingly. In addition, the age, medical / health status and behaviour of the participants must be considered. Safety arrangements must be established which are appropriate to the setting's circumstances and in proportion to the level of risk identified.

15.69 The risk assessment process must be led by a competent member of staff. Competence is always a combination of experience, personal aptitude and, where necessary, formal training. Forest School risk assessments and any associated documents (for example a Forest School handbook) should be undertaken and written by staff with the following level of training:

- a Level 3 Forest School practitioner. This can be achieved via:
 - IOL Bushcraft Competency Award/Certificate Bushcraft (outdoor-learning.org)
 - The Forest School Association: [Forest School Association | What is Forest School? | Forest Schools | Nature Premium](#)
- a Statement of Competence to lead Forest School activities from a Level 3 Forest School practitioner following bespoke training.

15.70 As Forest Schools can vary enormously in their scope and context, the control measures employed to manage the risks will vary accordingly. Nevertheless, there are some common themes which should be considered where relevant in the risk assessment:

- Consideration is given to the maintenance of the Forest School environment, including the management of any paths and trees. The inspection of trees must be undertaken on a regular basis by a competent person.
- Ensuring that locations are inspected before use to ensure that the site is safe to use and free from any items which may cause harm (particularly if there is a trespass problem).
- Ensuring that all staff have the correct level of training and experience, with leaders maintaining the competency levels described above. Training records should be retained.
- The correct adult to pupil ratio is clearly identified in the risk assessment to ensure effective supervision and is adhered to in practice.
- Ensuring that all instruction is tailored to each child's ability and the correct level of supervision is maintained.
- Any tools are correctly used, maintained, inspected and stored. Pre-user checks and supervision are essential here.
- Ensuring all personnel have the correct level of DBS vetting, especially when outsourcing staff.
- Any medical or health concerns associated with children are highlighted to staff. A sufficient number of trained personnel should be present and training should include responding to anaphylactic shock and asthma attacks.
- Ensuring that staff tasked with supervising the cooking of food have a recognised food safety certification (Level 2 Food hygiene).
- That management arrangements and fire safety standards are identified for the lighting of campfires, including firefighting equipment.
- Emergency procedures are prepared to cover factors such as medical emergencies, a missing child, and extreme / adverse weather conditions.
- All risk assessments and associated guidance should be reviewed at least annually, or after significant change in the provision or activities, or after an incident/accident.

15.71 Forest School activities where children are lighting fires or using edged tools must be endorsed by the Adviser for Outdoor Education as a Category B activity.

- 15.72 The scope of Forest School activities can encompass tree climbing activities. One of the principal benefits of this type of activity is that they provide children with the opportunity to challenge themselves and engage with and assess risk. This develops resilience, builds confidence and makes young people better equipped at making decisions in everyday life.
- 15.73 Nevertheless, in order to ensure that the risks are within acceptable parameters, tree climbing activities must be included in the Forest School risk assessment where proportionate controls can be identified.
- 15.74 The risk assessment needs to consider the local rules for the activity itself. The following areas should be considered:
- The competent practitioner (see section 11 above) undertaking the risk assessment should climb any trees being used to assess the risks in detail.
 - Check the ground surface underneath the tree for sharp roots, rocks or branches.
 - Height: decide upon the maximum permissible height. This is a matter of judgement in the risk assessment based upon knowledge of the participants and their capabilities, as well as the demands of the activity and the nature of the surface under the tree. Another critical consideration is limiting participants to a height where supervising staff can reach them. There can be no fixed rule here but do not allow children to climb higher than three times the height of the tallest child. Once a decision is made, a ribbon or similar marker should be applied to make this limit clear.
 - Decide on numbers who are permitted to climb the tree at one time. In this consideration it must be ensured that the area below the tree is clear. The default should be one climber at a time unless the tree is large enough to prevent climbers getting in each other's way and supervision is sufficient.
 - What rules will be applied in wet weather.
 - Allow children to find their own limits: do not give 'bunk-ups' or assist children to climb if they are individually not capable.
 - Consider what supervision levels you will need to make sure your local rules are applied.
 - Instruction: how the activity will be modelled for children by the Forest School Leader such as the 'rule of 3' – always keeping three points of contact. Instruct participants to follow the local rules and to recognize hazards such as dead-branches or disease.
- 15.75 Perhaps most obviously, the tree itself will need careful consideration in the risk assessment. How do you know that it is safe to climb? View it from a

distance to see if there are any obvious signs of disease and decay. Is this confirmed by a close-up inspection?

- 15.76 The online Tree Safety Management training course ([DeL - Devon Learning: Log in to the site \(learningpool.com\)](#)) is mandatory for staff undertaking tree inspections within DCC-maintained establishments. This will assist you in making these judgments.
- 15.77 Most importantly, trees should receive a regular inspection by a competent external tree inspector. In the DCC-maintained estate, this is undertaken annually. Any recommendations arising from these inspections must be implemented accordingly.
- 15.78 However, it is important to be mindful of the scope and limitations of external tree inspections. The purpose of these inspections is to carry out a visual inspection of all trees on site to identify obvious risk factors presenting an unacceptable risk of injury to persons, or damage to property. Where an unacceptable risk is identified, the inspector should recommend remedial measures with suggested timescales to reduce the risk. In making such assessments, the inspector cannot allow for temporary or subsequent changes to access, treatment or the use of the tree(s).
- 15.79 Therefore, whilst the findings of these inspections form an important element of the Forest School risk assessment process, inspections are not undertaken to assess, endorse or 'rubber stamp' the risk assessment for tree climbing activities. The risk assessment of tree climbing activities remains the responsibility of the setting and, specifically, the competent Forest School Leader.
- 15.80 It may be contended that some of the rules above are more 'lenient' than the safety rules applied to conventional standard compliant (BSEN1176) play equipment and these activities are therefore 'less safe'. There is, however, a critical difference between the two: unlike the use of conventional play equipment, which is climbed in undirected free play, tree climbing activities in Forest School are undertaken - and must only be undertaken - in supervised contact time where competent adults (led by Level 3 Forest School practitioners) are directing the activity. Therefore, whilst the potential hazard of tree climbing may be greater when compared to conventional play equipment, the overall risk should be no greater due to the enhanced degree of direction and control.
- 15.81 Further information and practical guidance can be found in the HS46/HSA46 Primary Curriculum Activities Arrangements Note and on the Forest School Association website: [Climbing Trees \(and rocks\) | Forest School Association](#).

Sponsored Walks and Large-Scale Events

- 15.82 Establishments must be clear about their legal responsibilities when organising events and inviting the participation of the public, young people or other schools. Any limitations to, or conditions of supervision or responsibility must be clearly shared with event users.
- 15.83 There are particular hazards associated with large scale events and from undertaking sponsored walks on roads. Check with local police where necessary. Consider alternative routes or means of achieving the same objectives, such as the use of a non-road environment or different activity. Consideration should be given to weather and environmental factors:
- adequate shelter if cold or wet weather is forecast
 - shade and water if hot weather is forecast (with means to replenish water)
 - adequate and timely information to participants about weather and environmental factors and what is expected of participants and what is offered by the organiser
 - emergency transportation of participants and staff
 - marshalling and check pointing.
- 15.84 Clear communication must take place between the organising establishment and participants detailing who is responsible for what. For large scale events on Dartmoor, please refer to: [Organising a recreational event | Dartmoor](#)

Residential Visits

- 15.85 Residential visits in the UK that do not include an adventurous activity are Category A visits and only require the approval of the Headteacher. Where required advice can be sought from the Advisor for Outdoor Education through Evolve visit notes.
- 15.86 Your Establishment specific SOP should have the control measures for managing a residential visit. There may be additional control measures added to these for the specific visit you are considering.
- 15.87 Residential visits could involve a visit to an outdoor centre, a youth hostel, a caravan/holiday park or hotel etc. The supervision of any group overnight involves additional responsibilities for the Visit Leader and other staff.
- 15.88 Where possible, separate staff and pupil toilet facilities (and where appropriate showers/washrooms) should be available. When this is not possible the Visit Leader must ensure staff and pupils use of these facilities is closely managed to avoid inappropriate contact or staff putting themselves or pupils at risk.

- 15.89 Where shared facilities are used, such measures should be recorded in the enhanced risk assessment of the Standard Operating Procedures form.
- 15.90 Providers of residential accommodation in the UK should complete an SOE5 to confirm standards of provision meet council expectations. Providers of residential accommodation who hold the Learning Outside the Classroom Quality Badge do not need to complete a SOE5.
- 15.91 Campsites where the establishment (or pupils) provides its own tents and cooking arrangements are **not** classed as residential providers and do not need to complete a SOE5. Visit Leaders should ensure facilities meet the groups needs and that the group is appropriately supervised in areas used by other campers, the public.
- 15.92 Where accommodation is in tents, yurts or cabins, the Visit Leader should satisfy themselves that adequate security arrangements are in place and should make clear notes in the enhanced risk assessment column of the SOP detailing how tents are to be arranged, tent groups, staff proximity, overnight use of toilets etc.
- 15.93 When selecting residential providers, the Visit Leader should consider:
- dormitories should normally be for a group's exclusive use
 - are all group members in the same area/wing/floor?
 - whether security arrangements are adequate to stop unauthorised visitors
 - when using hostels or hotels the Visit Leader should check how many keys are available for each bedroom and where they are kept avoiding the re- issuing of room keys to other guests in error
 - young people should be able to contact members of staff in the event of an emergency overnight
 - supervisory staff should ideally be accommodated in rooms adjoining or close to their group
 - young people and staff should know the lay out of the accommodation, key personnel, fire precautions and exits and necessary regulations and routines
 - access should be available to groups' rooms at all times by members of the accompanying staff.
- 15.94 A list of names must be provided by the Visit Leader to the accommodation provider. This should include other relevant information such as medical and dietary needs (when catering is provided). It is not necessary to share full parental consent and contact information with the provider.
- 15.95 The selection of a reputable tour operator is recommended where appropriate. This should form part of the risk assessment process. Establishments should ask

operators to confirm their safety management procedures and say if they have been externally verified.

Trampoline Parks

- 15.96 At present, the Local Authority will only endorse visits to trampoline parks where the activity is led by a British Gymnastics qualified coach. This is in line with advice from the Association for Physical Education, which is the most appropriate body to seek advice from.
- 15.97 The emergence of trampoline parks and similar leisure facilities without a national governing body or nationally accredited safety standards has led to concerns. RoSPA is also keen for parks to improve their safety: [Trampoline parks - RoSPA](#)
- 15.98 The Outdoor Educations Advisers' Panel has not been able to make a definitive statement on such parks as there is considerable variation in the quality and safety of such centres. There is also concern amongst medical practitioners about the extent and nature of injuries suffered at trampoline parks see; British Medical Journal – Injury Prevention Press Release – Trampoline Park injuries “emerging public health concern”: [trampoline-injuries.pdf \(bmj.com\)](#)
- 15.99 The Local Authority is very clear in that it does not recommend any particular provider. Instead, it sets down minimum expectations of coaching (as detailed above) and is prepared to endorse visits to any parks that can meet these standards.
- 15.100 Another concern is the requirement of some trampoline parks for customers to sign a ‘waiver’. The Local Authority will not endorse visits to any provider (for any activity) where customers are required to sign a waiver.
- 15.101 It is understood that many adventurous activities bring a certain level of risk, and that participation will always be a balance of risk v reward. However, for the more mature activities such as climbing or water sports, these risks have been well understood for decades and remedial action taken over time, as well as having robust safety regulations such as the AALA licensing scheme and formal national governing bodies. The same cannot be said for trampoline parks at present.
- 15.102 If schools plan visits to trampoline providers, then the Visit Leader must complete an Adventurous Activity Evolve Visit form for LA endorsement.

Theme Parks, Water Parks, Funfairs, etc.

- 15.103 Visits to theme parks and water parks, funfairs or similar are Category A. Whilst they may offer an element of fun, they are not classed as ‘adventurous activities’ by the LA. As such, these places should be recorded as ‘venues’ on Evolve. Such companies are **not** required to complete a SOE5.
15. 104 Visit Leaders should ensure the facilities meet the group’s needs and that the group is appropriately supervised in areas used by other venue users. As with all venues, Visit Leaders are not expected to seek risk assessments from these venues. In law they must provide a safe environment for customers. Travelling fun fairs are licensed by the LA.

Visits Abroad

15. 105 A minimum staffing ratio of 1 adult to 10 group members is recommended for visits abroad with a minimum of two adults, at least one of whom should be a member of employed school staff. For more complex visits, early notification to the Local Authority is required, this can be achieved by adding a note to the visit form on Evolve at the initial planning stage, often a year or more in advance.
- 15.106 For all visits abroad, the Visit Leader should be aware of the latest advice from the Foreign and Commonwealth Travel Advice Unit. Please refer to: [Foreign travel advice - GOV.UK \(www.gov.uk\)](http://www.gov.uk)
- 15.107 Visit Leaders should consider recent or heightened threats of terrorist activity as part of their risk management plan. This must include travel through major travel hubs as well as destinations. As part of the safety management plan all groups members should be provided with emergency action cards detailing contact numbers, addresses and useful phrases in the native language.
- 15.108 Actions specific to emergencies when travelling abroad must be detailed in the enhanced risk assessment column of the school SOP. Consider a number of ‘what if’ scenarios as part of the risk assessment process. Ask and answer questions such as, ‘What would I do if ... a young person got lost, was ill, was caught shoplifting and arrested or lost a passport or the group was stranded due to transport failure?’

Ski Visits Abroad

- 15.109 The LA recommends that the Visit Leader holds the Snowsport England Ski Course Organiser Award or has relevant and recent experience of organising school ski trips.

- 15.110 **Note Regarding ski lifts:** the Visit Leader must determine the type(s) of lift in use at the resort and must ensure that the relevant safety control measures are included in the visit risk assessment and are understood by all those attending the trip.
- 15.111 One key risk on chairlifts is the wearing of backpacks. Whilst these are usually carried by pupils for packed lunch and drinks, safety conscious tour operators will provide lunch vouchers, thereby eliminating the need to take rucksacks / backpacks to the slopes.
- 15.112 Visit Leaders are strongly encouraged to consider this as a key method of risk control and must make this and reference to the safety procedures in place within the visit SOP.

Overseas Expeditions

- 15.113 Expeditions by schools to remote areas and to developing countries, are becoming increasingly common. Such expeditions should be undertaken with great care to ensure that the objectives are clearly identified and reasonable, group members have appropriate prior experience to cope with the challenges of the programme, the expedition is led by appropriately competent leaders and emergency arrangements are suitably thorough.
- 15.114 Leaders should consider value for money and the extent to which such an opportunity provides sound educational benefits and meets the school's inclusion policy. Strategic leaders should consider whether visits that cost several thousand pounds and are only available to small numbers are compatible with the school's values.
- 15.115 Parental consent must be based on a thorough explanation of the intended programme by the provider, including travel and accommodation arrangements, all planned or possible activities and associated risks.
- 15.116 Plans to take part in overseas expeditions should be notified to the Advisor for Outdoor Education via Evolve at the planning stage, before a contract is agreed with any external company.
- 15.117 Contracts with expedition companies should only be signed off by the Headteacher. The Headteacher should therefore be well aware of the contractual arrangements.
- 15.118 Where a contract is signed by a school employee, the visit becomes a 'school trip' and as such the school must follow the LA policy in all respects.
- 15.119 Schools should not allow expedition companies to 'market' their services via the

school if it is not a school visit.

- 15.120 Overseas expeditions and other trips abroad with significant risk, such as those to challenging terrain, remote regions, extreme climates, or where health hazards can be expected.
- 15.121 All providers of overseas community projects, field work or expeditions must either be members of the Expedition Providers Association or, hold the Learning Outside the Classroom Quality Badge or, must operate to British Standard BS 8848:2014 and have gained 'other party' assessment. This standard provides a rigorous framework for assessing and managing the risks associated with such visits.
- 15.122 Expeditions using external providers are the only category of visits where the LA advises Visit Leaders to request detailed risk management plans from providers. Due to the extended duration and remoteness of these visits the Visit Leader must be fully conversant with the provider's plans for the whole expedition. This will include understanding what any emergency rescue or extraction will involve, the proximity of medical assistance/hospitals, the extent of additional support available for the provider, etc.
- 15.123 Most expedition providers allocate staff places based on the number of pupils' places, and do not always offer 2 staff places. The Local Authority recommends that there should be a minimum of two adults on all school visits.
- 15.124 Due to the extended and remote nature of overseas expeditions, Headteachers may consider the need to pay for additional staff places from school budgets to meet their obligations to provide a safe working environment for staff and pupils.
- 15.125 On all occasions there must be at least one member of school staff on all overseas expeditions and additional staff/adults determined by the number of pupils in total. Overseas expeditions where no school staff are present will **NOT** be endorsed by the LA.
- 15.126 If the Headteacher decides to approve a visit provided by an expedition company with only one member of staff attending they must consider the impact on their employee and the safeguarding of their pupils.
- 15.127 If your school is paired with another school on the expedition, the LA recommends that early contact is made between the schools (at Headteacher-to-Headteacher level). This contact should include a request for the partner school to provide a reference and evidence of DBS checks for their supervising adults with the reciprocal offer made.

- 15.128 Due to the extended nature of such expeditions, it is almost guaranteed that at some point the staff of the partner school will have to supervise pupils from your school, either to allow your employee some rest or if your employee has to attend hospital with one of your pupils etc. Therefore, the Headteacher and Visit Leader must ensure that such other adults are dealt with in line with the establishment Safeguarding Policy as ‘volunteers’.
- 15.129 Headteachers are unlikely to allow unknown adults to supervise their pupils overnight and in temporary accommodation with unconventional toilet and showering arrangements in the UK, so they shouldn’t do so elsewhere. Where schools have taken this advice and contacted partner schools, it has been seen to be very beneficial to all parties.
- 15.130 If a partner school refuses to engage in this type of relationship, it is likely that little support will be offered by the partner school’s staff during the visit. Therefore, the Headteacher and Visit Leaders should ensure they have sufficient competent adults to supervise their own pupils throughout the visit and to cope with emergencies.
- 15.131 Support provided by the expedition companies’ staff is of a technical nature; travel, accommodation etc. Visit Leaders cannot rely on expedition companies to supervise pupils except in emergency situations. Further information is available at:
- Young Explorers Trust: [Young Explorers' Trust \(theyet.org\)](http://theyet.org)
 - Expedition Providers Association: [Young Explorers' Trust \(theyet.org\)](http://theyet.org)
- 15.132 **Acclimatisation and altitude gain:** all relevant authorities are agreed that the emphasis in planning an expedition to visit or work at altitudes over 3000m must allow the whole party to gain altitude acclimatisation in a gradual manner. The provider must have a program of ascent based on expert medical advice which will significantly reduce – but not necessarily eliminate – the occurrence of Acute Mountain Sickness or other altitude-related ill-health.
- 15.133 Schools should be extremely wary of any expedition provider that ties the expedition into a strict timescale for high altitude ascents, particularly where financial or other constraints might act against making the time available for medically appropriate ascent profiles and altitude acclimatisation as described below. Please refer to: [*Schedule of fees for Evaluations \(theyet.org\)](http://theyet.org). Further medical advice is available from: [Exeter Travel Clinic | The Southwest's Travel Health Specialist](http://theyet.org)

Tour Operators

- 15.134 Schools should seek to use the services of a reputable tour operator

experienced in group travel. Air travel organisers may be licensed through ATOL (Air Travel Organisers Licence) for all or part of a package.

15.135 It is recommended that establishments use tour companies which are members of a Department of Trade approved bonding body; such as the Association of British Travel Agents (ABTA) or the Association of Independent Tour Operators (AITO). Ensure you have ready access to your insurance company telephone number.

15.136 It is also recommended that groups choose where possible a tour operator that holds the Learning Outside the Classroom quality badge, and /or is registered with the Schools Travel Forum. Additional checks may also be required to confirm the financial stability of the company.

15.137 The SOE5 should be used if the operator does not have hold the Learning Outside the Classroom badge. These checks should be completed *before* any booking is made or deposit paid.

15.138 In addition to the Planning Checklist in appendix 1, Visit Leaders planning visits abroad should:

- ensure they meet the required time scales for notification of the visit asset out in this policy
- identify whether there are medical requirements imposed by the country being visited
- ensure all participants have a European Health Insurance Card (EHIC) or Global Health Insurance Card (GHIC)
- ensure all members of the party carry the address and telephone number of the hotel or hostel in case of separation (see Evolve/Resources for templates)
- identify an emergency contact for parents
- brief young people about any local hazards and emergency procedures, including the use of mobile telephones abroad
- discuss any local customs and cultural issues
- agree codes of conduct with young people check visa and passport requirements – photocopies of passports and other essential documents may prove useful
- consider language ability as part of the risk assessment process.

15.139 Advice on medical matters abroad or vaccinations required is available from: [Exeter Travel Clinic | The Southwest's Travel Health Specialist](#)

15.140 **Collective (Group) Passports:** for details about collective passports and other passport enquiries visit: [Collective \(group\) passports: Overview - GOV.UK \(www.gov.uk\)](#)

Exchange Visits

15.141 The success of a foreign exchange is largely dependent on good relationships and planning and communication with staff in the host school or youth group. In particular, Visit Leaders should:

- check the status of the exchange programme provider to ensure they are a legitimate organisation, with links to a professional or governmental body
- seek reassurances from the host school about procedures for checking the suitability of host families – particular care should be taken if external agencies are used to recruit host families
- consider whether the individuals undergoing the exchange are suitable and able to cope with the change in culture and separation from home
- ensure all group members have easy contact with the Visit Leader whilst in the host country
- make young people aware of the ground rules agreed between the Visit Leader and the host family
- ensure home stay exchanges are well-planned, with sensible pairing arrangements
- for reciprocal home stay exchanges in the UK, liaise with the school's designated safeguarding lead to ensure to help ensure the suitability of hosting arrangements and compliance with the school's safeguarding policy
- provide host families with details of medical or dietary needs
- ensure UK parents are asked for informed consent for any adventurous activities planned
- ensure host families abroad are aware of any restrictions on certain activities during family time.

15.142 Information is available from the British Council here:

[Arrange a school visit or exchange | British Council](#)

Air Activities Other Than Commercial Flights

15.143 Included in this section are gliding, hang gliding, flying (except commercial flying), parachuting and other air-based activities. These fall within category C, which means that details must be notified via Evolve.

15.144 The council's insurers do not provide insurance cover for air borne activities. For these reasons the council will need Visit Leaders to ensure the provider of the activity has public liability insurance and that participants consider their own needs in terms of accident insurance.

Boating – rowing, water-skiing, jet ski, fishing from a boat, etc.

- 15.145 **Rowing:** this activity should normally be undertaken with an established club or provider. The Form SOE5 should be used to ensure that the provider meets the standards of the Local Authority.
- 15.146 **Water skiing and associated activities:** water skiing and similar activities, such as banana rides and wake boards, should only be offered to groups through registered operators, and not on private boats.
- 15.147 The National Governing Body for water skiing is British Water Ski & Wakeboard (BWSW): [Home - British Water Ski and Wakeboard \(bwsw.org.uk\)](http://bwsw.org.uk). The BWSW runs an approval system for water ski schools and has an established Ski Boat Driver Award (SBDA).
- 15.148 Banana rides or similar are often offered as an additional activity by sailing schools.
- 15.149 **Jet skiing (personal watercraft):** this activity should only be offered to groups through registered organisations, and **not** on private craft. The National Governing Body for personal watercraft is the RYA. The RYA register and approve centres and schools and have an award system for instructors: [Home | RYA - Royal Yachting Association](http://www.rya.org.uk).
- 15.150 **Sea fishing from a boat:** When a private or hired boat is being used the leader or skipper must be qualified in safety and power boat handling or equivalent, and all members of the party must wear an appropriate personal flotation device (buoyancy aid or lifejacket).
- 15.151 The boat must be fit for purpose and carry appropriate equipment. The boat owner / skipper should complete the form SOE5 and, in particular, hold appropriate Public Liability insurance.
- 15.152 For commercial boats, the skipper and the boat must both be licensed by the local authority and must comply with the Maritime and Coastguard Agency relevant Code of Practice Certification. The skipper must hold a Commercial Endorsement. The skipper should brief the participants on behaviour and safety points. Form SOE5 must be used.

Camping in Non-Remote (Wild) Environments

- 15.153 Camping on commercial campsites or by special arrangement with landowners on land that is readily accessible by vehicles is a Category A activity, *if the following conditions apply:*
- pupils are *not* required to use stoves or light campfires
 - staff *are* responsible for all cooking and/or lighting/supervising campfires.

15.154 In these circumstances no specific qualification is required but staff must be competent to manage the activity safely. The Visit Leader should consider in their risk assessment and record with the SOP:

- selecting appropriate camp site
- liaising with campsite or landowner on visit purpose
- safe use of stoves/BBQs/Campfires
- safe supervision of pupils in proximity to the above
- food hygiene, including storing, preparation and cooking
- safe handling and storage of flammable substances
- access to clean drinking water
- access to suitable toilet/washing facilities
- site security
- supervision of pupils and interaction with the public
- gender mix of pupils and staff
- overnight security and safeguarding
- appropriate selection of equipment or advice to pupils on same
- correct siting and pitching of tents
- group use of shared tents and safeguarding
- proximity of staff to pupils' tents
- supervision of 'down time'
- Pupils' access to illegal substances.

15.155 In determining Visit Leaders' 'competence' to lead this activity, Headteachers may consider the Visit Leader's experience of social/family camping along with knowledge of the group and their patterns of behaviour.

15.156 Due to the additional concerns regarding safeguarding in a camping environment, the LA recommends that the Designated Safeguarding Lead specifically endorses the proposal, the cohort and the program of activity.

15.157 Schools may consider the need for formal food hygiene training or appropriate in-house training by a competent person specific to the planned activity.

15.158 Training for camping at non-remote simple camp sites is available as the Coastal & Countryside Leader (Camping Endorsement) as part of the South West Moorland Leader Training Scheme: [The South West Moorland Leader Training Scheme - South West Moorland Leader Training Scheme \(swmlts.org.uk\)](http://www.swmlts.org.uk)

Cycling on Roads or Non-Technical Trails

15.159 Cycling provides great opportunities for independent journeying. An awareness of traffic hazards on all roads and how to avoid such hazards must, however, be a priority.

- 15.160 Where cycling takes place on public roads, or on non-technical cycle trails, such as the Tarka Trail, Granite Way or the “Discovery” routes at Haldon Forest, the activity are Category A. Technical trails and trails in remote country are Category B.
- 15.161 There are a number of national awards for cycling, and leaders are strongly encouraged to obtain an appropriate national award. Where a leader does not hold an award, they must be able to demonstrate appropriate, recent and relevant experience in cycling in the environment to be used.
- 15.162 In addition to the visit SOP, the Visit Leader should write an additional ‘activity specific’ risk assessment addressing the specific hazards of the planned cycling activity/environment.
- 15.163 Training opportunities and additional information can be found via: [Mountain Bike Leadership - British Cycling](#) or [Cycle courses and training | Cycling UK](#)
- 15.164 [Devon County Council](#) provides one-day cycle training courses for pupils and adults: [Cycle training - Travel Devon](#)
- 15.165 Recommended minimum staffing ratios 1:10. This may need to be improved, informed by risk assessment and with particular regard to terrain, hazards, group age and experience. There should be an assistant leader if group members have limited previous experience of riding in groups or on roads.
- 15.166 Additional controls and safety factors:
- Cycling on roads presents additional risks. The danger from traffic is an increasing problem, even on quiet country lanes. Leaders are encouraged to use dedicated cycle ways wherever possible and may consider transporting bikes to cycle way venues, or hiring on site
 - reflective materials on clothes or cycles greatly increase the visibility other road users have of cyclists and are strongly recommended
 - helmets should be worn when cycling on and off road
 - groups should practice in a safe area to ensure they can control their bikes properly.
 - leaders should ensure group members understand correct behaviour and are aware of dangers en-route
 - uncontrolled descents and blind corners present particular hazards on even the most minor roads
 - leaders should hold a current first aid certificate
 - cyclists should be proficient and have appropriate knowledge of the Highway Code
 - access may need to be negotiated when cycling off roads. Cyclists have a right of way along public bridleways but not along public paths

- cycle in single file on roads
- particular care should be taken on unstable or wet surfaces
- leaders should have experience of both cycling and basic cycle maintenance
- cycles should be checked for roadworthiness, particularly brakes, tyres and lights.

Surfing

15.167 Most surfing activities take place at established surf schools. The LA will only endorse the use of surf schools approved by Surfing England or the Academy of Surfing Instructors. Visit Leaders should check the accreditation of the intended surf school before a booking is made. Form SOE5 should also be used to confirm accreditation.

15.168 Additional information can be found via:

[Surf Schools Archive - Surfing England Academy of Surfing Instructors](#) | [Academy of Surfing Instructors](#)

Coasteering

15.169 Coasteering is normally provided by an external provider. Any such provider must be a member of the National Coasteering Charter and must also hold an AALA licence for Coasteering: [UK based regulatory body for coasteering - National Coasteering Charter](#)

15.170 Often, Coasteering is offered by Surf Schools and a replacement activity on days when surfing is not possible. It is of particular importance when making a booking with a surf school (or other watersports provider) to ascertain whether Coasteering might be a possibility and that the provider holds the correct accreditation to do so. Form SOE5 should also be used to confirm accreditation.

Stand Up Paddle Boarding (SUPing)

15.171 SUPing is normally provided by an external provider. Any such provider must be formally accredited by either the British Stand Up Paddle Boarding Association [BSUPA School Archive - BSUPA](#) or British Canoeing [Paddling Centres | Find paddling centres near you | Canoe | Kayak | SUP \(gopaddling.info\)](#).

15.172 Where SUPing takes place on the sea or on tidal waters (estuaries), the provider must also hold an AALA licence for SUPing.

15.173 Often, SUPing is offered by Surf Schools as a replacement activity on days when surfing is not possible. It is of particular importance when making a booking with a surf school (or other watersports provider) to ascertain whether SUPing might be a possibility and that the provider holds the correct accreditation to do so. Form SOE5 should also be used to confirm accreditation.

Horse Riding & Pony Trekking

15.174 Providers of Horse Riding or Pony Trekking must be members of the Association of British Riding Schools (ABRS) or the British Horse Society (BHS). This will be evidenced by completion of form SOE5.

15.175 A number of organisations provide horse or equine 'therapy'. In these settings pupils do not normally ride horses and therefore these are not classed as 'adventurous'. In such cases the Visit Leader must ensure the nature of the activities are suitable for participating pupils through a pre-visit and conversations about the services offered.

15.176 Further information can be found at:

- The Association of British Riding Schools: www.abrs-info.org
- British Horse Society: www.bhs.org.uk
- Riding for the Disabled Association: www.rda.org.uk

15.176 School Teams entered into sporting events at parent's request: schools are sometimes asked by parents to sign an entry form for their child to enter a sporting competition. This is often Horse Riding. Headteachers should not sign competition entry forms on behalf of the school unless they plan to treat it as a school organised visit and carry out the normal procedures such as risk assessment and recording on Evolve. By signing entry forms, the school assumes responsibility for due diligence regarding the event's safety and organisation as with any other external provider.

SECTION FOUR

16 EMERGENCY ACTION

- 16.1 Whilst careful planning of visits will prevent most problems, the nature of off-site visits and adventurous activities means sometimes things will go wrong. To assist Visit Leaders, Headteachers, establishment staff and governors, a suite of emergency cards and emergency response documents are available at: Evolve/Resources/Guidance, Polices & Documents/Emergency Action.

Critical Incident Visit Leader Action Card

- 16.2 Adapt this card to your establishment and make sure the Visit Leader and all accompanying staff have a copy with them at all times.

Critical Incident First Contact Card

- 16.3 The person who answers the phone in the school office or the back at base contact will not be expecting a call from the Visit Leader saying they are in trouble. As soon as a call for help is received, the respondent should take this contact card and get the information required from the Visit Leader. This may be your only opportunity to speak to them.
- 16.4 Adapt this card to your establishment and make sure the relevant people have it to hand;
- School office – clearly marked
 - In the possession (at home) of SLT or anyone acting as Back at Base contact

Critical Incident Senior Manager Action Card

- 16.5 Establishment staff may be unpracticed in dealing with critical incidents on visits. This action card provides prompts and advice for managing your response to critical incidents.
- 16.6 Adapt this card to your establishment and make sure the relevant people have it to hand:
- School office – clearly marked
 - In the possession (at home) of SLT or anyone acting as Back at Base contact.

'Teacher Down' Emergency Action Card

- 16.7 Often the default position for Visit Leaders is to 'phone the school, if something goes wrong', without consideration for something 'going wrong' with the Visit Leader themselves. When there is only one Visit Leader or when staff are supervising small

groups away from the main party, the employer should consider how they can meet the needs of the employee as a 'lone worker'. This card provides instructions for pupils in order to look after the adult and themselves.

- Adapt this card to your establishment.
- On the rare occasions when there is only one Visit Leader, the whereabouts of this card should be made known to pupils (minibus glove box, teacher's rucksack etc.)
- Appropriate training should be given to pupils as to what to do in the event of a teacher being incapacitated.
- It is only anticipated that secondary age pupils should have access to this information.

Student Emergency Action Card

16.8 During visits where students will be remotely supervised, (in the UK or overseas), the Headteacher must ensure there are appropriate plans in place in case pupils become lost or experience difficulties. Adapt this card to your establishment and for each type of Visit.

Critical Incident Additional Support and Advice

16.9 Experience of critical incidents teaches us that a wide support network is often needed including professional support and advice: media, legal, medical, insurance etc. This document should be adapted to your establishment's needs including your supporting professionals/services.

16.10 The card lists the contact details of the services offered by the Local Authority to Maintained Schools only. Academies and Independent Schools should make similar provision.

SECTION FIVE

17 ADVENTUROUS ACTIVITIES LED BY SCHOOL STAFF (OR VOLUNTEERS)

Notes:

“Led” means the member of staff or volunteer holds the appropriate award/competency and an external provider is not used

“Min Ratio” means the number of “qualified” staff or volunteers per pupil numbers

- 17.1 Where a national or local award is required, the Visit Leader is responsible (and the employer in law) for ensuring training records are up to date. This includes any first aid award that is a requirement for the award to be valid. Staff must ensure any necessary award is recorded in their staff profile on Evolve.
- 17.2 Where a leader holds a specific award, their actions must be guided both by the awarding body and the LA policy.
- 17.3 Where a recommended ratio is stated, this must be considered as part of the risk management process. The LA can only offer guidance on this respect as individual activities/environments/pupils will determine the correct ratios.
- 17.4 Where ‘relevant experience’ is stated as a qualification, the Headteacher is responsible for the leader’s competence. Contact the Adviser for Outdoor Education for specific advice.
- 17.5 Where the ‘Letter of Competence from Technical Adviser’ is stated as a qualification, this must be provided by someone who holds significant relevant qualifications in this area and/or is able to provide the same level of qualification on behalf of national or local governing body. Contact the Adviser for Outdoor Education for specific advice.
- 17.6 If your planned activity is not listed below, contact the Adviser for Outdoor Education for specific advice.

Activity	National/Local Governing body or umbrella body	Recommended min. ratios	Min. qualification	Notes
Archery	Archery GB Instructor Award Archery GB	1:8	Archery GB Instructor	
Bush craft/Forest School type activities	Forest School Association What is Forest School? Forest Schools Nature Premium Institute for Outdoor Learning - Home (outdoor-learning.org)	1:10	Forest School Leader Level 3 or IOL Competency Certificate or Statement of Competence from a Level 3 Forest School practitioner	Cat B if pupils are lighting fires or using edged tools, Cat A if not
Bouldering indoors or outdoors	Mountain Training (mountain-training.org)	1:6	Relevant experience and Emergency First Aid at Work award	Bouldering excludes the use of ropes or harnesses. Climbing helmets must be worn. External climbing walls may require leaders to undertake their own 'supervisors' assessment
Camping in remote 'wild' environments	The South West Moorland Leader Training Scheme - South West Moorland Leader Training Scheme (swmlts.org.uk) Mountain Training (mountain-training.org)	1:15	SWMLTS Summer Moorland Camping Leader MTE Hill & Moorland Leader ¹ with exped. module	When 'wild' camping the leader must also hold the relevant walking/biking/paddling award to operate in that environment
Caving	British Caving Association - Underground in the British Isles (british-caving.org.uk)	1:8	BCA Local Cave & Mine Leader	The level of the award (1 or 2) determines the cave system that can be

				used. A second responsible adult, who has previous experience of the cave, should accompany the group
Climbing indoors in school or external providers	Mountain Training (mountain-training.org)	1:6	MTE Climbing Wall Instructor or DCC Climbing Wall Super Wall Supervisor ²	External climbing walls may require leaders to undertake their own 'supervisors' assessment. Leaders should not rely on 'in-house' sign-off alone
Climbing & Abseiling on Single pitch crags less than 30 minutes from road or refuge	Mountain Training (mountain-training.org)	1:6	MTE Rock Climbing Instructor ³	
Climbing Multi-pitch (summer)	Mountain Training (mountain-training.org)	1:3	MTE Mountaineering and Climbing Instructor ⁴	
Climbing Multi-pitch (winter)	Mountain Training (mountain-training.org)	1:2	MTE Winter Mountaineering and Climbing Instructor ⁴	
Climbing - Tyrolean traverses	Mountain Training (mountain-training.org)	1:6	Single Pitch Award AND 'statement of competence' from a Technical Adviser in the use	These can be improvised, or semi-permanent. They can be between trees, over rivers and across gorges. Visit Leaders should be conversant

			of Tyrolean set ups OR Mountaineering and Climbing Instructor ⁴	with the correct use of equipment selected as Tyrolean set ups can exert unconventional forces on equipment
Coasteering	UK based regulatory body for coasteering - National Coasteering Charter	1:6	Site specific 'Statement of Competence' from a Technical Adviser who is a member of the National Coasteering Charter	Participants must wear appropriate clothing and PPE
Fishing from the water's edge	Home - Angling Trust	1:6 for coast and tidal areas or 1:10 inland	Relevant fishing experience and Emergency First Aid at Work award	See: Group Safety at Water Margins (Evolve), Leaders should have local knowledge of the area and access arrangements and be aware of weather forecast/tides etc.
High ropes courses	Training (erca.uk)	1:6	ERCA Site Specific Instructor or ERCA Traditional High Ropes Instructor	
Mountain Biking on Technical Trails	Mountain Bike Leadership - British Cycling Mountain Bike Leader Award — MIAS Cycle courses and training Cycling UK	1:8	Award/terrain dependent	Each awarding body offers a range of awards for different terrains. See weblinks

Orienteering	Coaching (britishorienteering.org.uk)	1:15	Relevant experience or British Orienteering Teaching Orienteering Part 1 or 2	Orienteering is 'adventurous' Cat B when taking place off school site
Paddle sports: Canoeing Kayaking Stand up Paddle Boarding	The Home of Paddle UK The NGB for paddling and paddlesport BSUPA British Stand Up Paddleboarding Association	As per NGB Syllabus dependent on activity and environment	As per NGB Syllabus dependent on activity and environment	See British Canoeing or British SUP Assoc. for specific advice for each paddle sport and environment
Rafting, including improvised raft building	No National Governing Body for this activity	1:8	Relevant experience or appropriate paddle sport leader award	Contact the Adviser for Outdoor Education for specific advice
Skiing & Snowboarding	BASI - Become a ski or snowboard Instructor Schools - Snowsport England	As per NGB syllabus	Dependent on activity and environment	Leaders can supervise but not instruct skiing with the Snowsport England Alpine Ski Course Leader Award
Surfing	Home - Surfing England Academy of Surfing Instructors Academy of Surfing Instructors National Vocational Beach Lifeguard Qualification (NVBLQ) Provided by RLSS UK	1:8	Relevant personal experience of surfing AND Beach/Surf lifeguard award	

	Lifeguard Training – How to Become An RNLI Beach Lifeguard			
Walking: coastal & countryside	The South West Moorland Leader Training Scheme - South West Moorland Leader Training Scheme (swmlts.org.uk) Mountain Training (mountain-training.org)	1:15	SWMLTS Coastal & Countryside Leader or MTE Lowland Leader Award	Day walks or expeditions in coastal and countryside environments are 'adventurous' Cat B when part of Duke of Edinburgh activities or training for Ten Tors
Walking: moorland	The South West Moorland Leader Training Scheme - South West Moorland Leader Training Scheme (swmlts.org.uk) Mountain Training (mountain-training.org)	1:15	SWMLTS Summer/Winter Moorland Leader MTE Hill & Moorland Leader ¹	Summer/Winter are determined by the weather conditions not the time of year. See SWMLTS Syllabus for details
Walking: mountain	Mountain Training (mountain-training.org)	1:8 Summer 1:6 Winter	MTE Summer/Winter Mountain Leader	Summer/Winter are determined by the weather conditions not the time of year. See MTE Syllabus for details
Walking: abroad	Leaders can operate abroad with a UK award but must only operate in terrain equivalent to their UK Award or hold the International Mountain Leader Award (summer/Winter): International Mountain Leader (mountain-training.org) . Contact the Adviser for Outdoor Education for specific advice			

1. Formerly called Walking Group Leader (WGL)
2. This award is no longer offered by DCC
3. Formerly called Single Pitch Supervisors Award (SPA) Formerly called Mountain Instructor Award (MIA)
4. Formerly called Mountain Instructor Certificate (MIC)

Planning Checklist for Visits and Off-Site Activities

This checklist provides a summary of the main points which should be considered by the Visit Leader when planning a visit off-site. The checklist may be used as an aide-memoire by the Visit Leader or may be used as an audit by the Headteacher or governing body.

Points to consider	Notes
Is the Visit Leader, sufficiently experienced and competent to assess the risks and dynamically manage the proposed visit or activity?	
Is there adequate time to prepare for the visit properly?	
Will the Visit Leader be present throughout the visit or will there be some remote supervision?	
Is there a clearly identified educational purpose for the visit any of its constituent parts, appropriate to the age and ability of the group?	
Is the Visit Leader sufficiently able to risk assess the visit?	
Are the staff involved in the visit sufficiently able and experienced to re-assess risks on an on-going basis throughout the programme?	
Has the Visit Leader made a preliminary visit to the site or centre to be visited, to check arrangements?	
If no pre-visit has been carried out, has action been taken to ensure the Visit Leader is aware of potential hazards and	
Is the proposed location of the visit suitable for the activity being done and appropriate for the group?	
Where there is any uncertainty about safe practice, has advice been sought from someone with expertise or technical competence?	
Does the visit involve activities or services provided by and external provider? If so, have they completed an SOE5?	

Appendix 1

Has the Visit Leader and Head read the SOE5 and are you satisfied with the provider's answers?	
Do members of staff have sufficient knowledge of young people for whom they are responsible?	
Are members of staff, or volunteers leading adventurous activities suitably competent/qualified to do so?	
Have adult volunteers been DBS checked, where necessary?	
Are there sufficient adults to effectively supervise all aspects of the visit?	
Does staffing include male and female supervision, where necessary?	
Do plans and staffing ratios reflect the needs of anyone with a disability or needing extra support?	
Have parents/guardians given the necessary informed consent for the visit?	
Is the programme suitable for all of the participants?	
Is there an alternative programme (Plan B) in the event of poor weather, or other necessary change and have the risks related to Plan B been considered?	
Are the young people prepared for and physically capable of taking part in the proposed activity?	
Are staff aware of dietary and medical needs of young people and staff?	
Have suitable and sufficient arrangements been made for first aid?	
Is appropriate transport available?	
Is there a contingency plan in the event of a delay or early return?	
Are there suitable and sufficient qualified and DBS checked drivers for any planned minibus journey?	
Is there adequate and suitable insurance cover?	
Have arrangements been made to finance the visit and manage the associated funds?	

Appendix 1

Will the young people be properly briefed on the activities they will do during the visit?	
Have all supervising adults been involved in the risk assessments process?	
Will the Visit Leader provide a briefing to all other supervising adults	
Does that staff briefing include; a list of names of people in subgroups; emergency procedures; specific medical/dietary requirements of group members?	
Have the findings of the risk assessment process (the SOP) been shared with all supervising adults in good time?	
Has a named emergency contact been identified at home or at base in the event of an emergency?	
Do all supervising adults have this person's contact details?	
Are the supervising staff sufficiently aware of the school's emergency and accident procedures?	
Do supervising staff have access to relevant emergency and group home contact numbers?	
Have arrangements been considered for appropriate follow up work and evaluation after the visit?	
Have appropriate records been kept; finance/first aid/safeguarding etc?	
Is there a planned opportunity to share outcomes arising from the visit and learn from problems or incidents?	

CAN YOU DRIVE A MINIBUS?

By comparing your driving licence to the driving licences below you can determine what type of minibus you can drive and under which regulations.

This person passed their car (category B) driving test AFTER 1 January 1997



If you passed your category B driving test on or after 1 January 1997, you may drive a minibus that is not being used for hire and reward¹ if the following conditions are met:

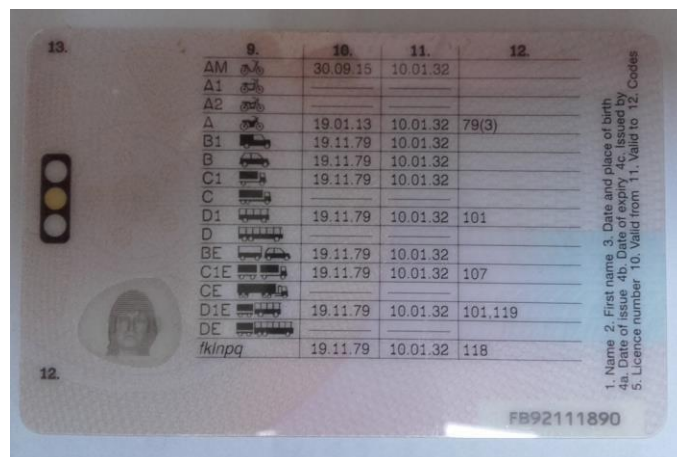
- You are over 21 and have held a category B licence for at least 2 years
- The minibus is used by a non-commercial body for social purposes (i.e., a school)
- You receive no payment other than the recovery of your out-of-pocket expenses (e.g., fuel and parking costs)
- You provide the service on a voluntary basis²
- The legal Gross Vehicle Weight (GVW) of the minibus is not more than 3.5 tonnes (or 4.25 tonnes if including any specialist equipment to carry disabled passengers)
- You do not tow a trailer.
- The establishment holds a Section 19 Permit³ which must be displayed in the minibus

Notes:

1. Hire and Reward means payment (of any kind) that entitles passengers to carriage. If a minibus is being used for a school visit and payment is made for the visit (not just for the minibus journey) then this is deemed to be 'for hire and reward'. See Section 19 permits below

2. Voluntary basis means driving a minibus is not specified in your contract of employment
3. Section 19 permits allow educational establishments to make a charge for carriage (as is the case for the majority of school visits) without the need for a full Passenger Service Vehicle Operators Licence. Section 19 permits are available from the Traffic Commissioner online.
www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372

This person passed their car (category B) driving test BEFORE 1 January 1997



If you passed your category B (car) driving test before 1 January 1997, you can drive a minibus that is not being used for hire or reward¹ as these licences automatically include category D1 (101) (not for hire or reward) entitlement.

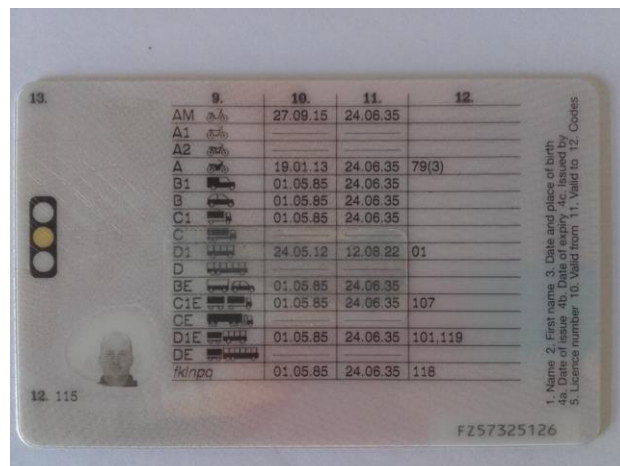
- This means school staff with such a licence can drive a minibus carrying up to 16 passengers with no maximum weight restriction on the vehicle.
- You provide the service on a voluntary basis²
- The establishment holds a Section 19 Permit³ which must be displayed in the minibus
- Drivers with a D1 + E (101) (not for hire or reward) entitlement can tow a trailer over 750kg.

Notes:

1. Hire and Reward means payment (of any kind) that entitles passengers to carriage. If a minibus is being used for a school visit and payment is made for the visit (not just for the minibus journey) then this is deemed to be 'for hire and reward'. See Section 19 permits below

2. Voluntary basis means driving a minibus is not specified in your contract of employment
3. Section 19 permits allow educational establishments to make a charge for carriage (as is the case for the majority of school visits) without the need for a full Passenger Service Vehicle Operators Licence. Section 19 permits are available from the Traffic Commissioner online.
www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372

This person has passed a separate PCV driving test



If you passed a separate PCV (passenger carrying vehicle) driving test you can drive a minibus that is being used for hire or reward¹. These licences include category D1 but do not have the 101 not for hire or reward endorsement.

- This means school staff with such a licence can drive a minibus carrying up to 16 passengers with no maximum weight restriction on the vehicle.
- IF you provide the service on a voluntary² basis the establishment does not need a PSV Operators licence, as long as the establishment holds a Section 19 Permit³ which must be displayed in the minibus
- Entitlement to tow a trailer is determined by the date your original driving test was taken.
- If you are contractually obliged to drive a minibus your establishment must hold a PSV Operators licence.

(The code 01 on this particular licence, not 101, means the driver must wear corrective glasses when driving a minibus but not a car as the medical requirements for minibus driving are stricter)

Notes:

1. Hire and Reward means payment (of any kind) that entitles passengers to carriage. If a minibus is being used for a school visit and payment is made for the visit (not just for the minibus journey) then this is deemed to be 'for hire and reward'. See Section 19 permits below
2. Voluntary basis means driving a minibus is not specified in your contract of employment
3. Section 19 permits allow educational establishments to make a charge for carriage (as is the case for the majority of school visits) without the need for a full Passenger Service Vehicle Operators Licence. Section 19 permits are available from the Traffic Commissioner online:
[Application for a standard or large bus permit \(PSV372\) - GOV.UK](https://www.gov.uk/government/guidance/application-for-a-standard-or-large-bus-permit-psv372)
www.gov.uk

Form SOE3: Parental Consent for Off-Site Activities

Dear Parent or Guardian

You have already received details about our forthcoming visit or activity. Please complete and return this form giving your consent for your child to take part in this activity.

School, college or establishment	
Visit or activity	
Dates and times	
Name of child	Date of birth
<p>Special details - any information about your child's health which may need special attention but does not prevent them from taking part should be noted below. (For example; any allergies, any medication needed and the dosage, travel sickness, diabetes, asthma or epilepsy?)</p>	
Has your child had any relevant recent illness?	

Does your child have any specific dietary requirements?
Do you have any additional comments?
Swimming ability (for water-based activities) Is your child able to swim 50 metres? YES / NO Is your child water confident for the proposed activity? YES / NO
Name of family doctor
Approximate date of last tetanus injection:

1. I would like my child to take part in this visit or activity and having read the information provided agree to him/her taking part in the activities described.
2. I consent to any emergency medical treatment required by my child during the course of the visit.
3. I confirm that my child is in good health and I consider him/her fit to participate.

Name of Parent/Guardian: _____

Signature: _____

Date: _____

Address: _____

 Email: _____

Phone 1: _____

Phone 2: _____

Section to be completed by schools in compliance with General Data Protection Regulations. Schools may wish to add an explanatory paragraph regarding their data management and refer to their privacy notice and named Data Protection Officer [here](#).

Form SOE3a: Annual Parental consent for off-site activities

Dear Parent or Guardian,

This is a consent form to cover local off-site trips and visits that your child may be undertaking during the school year, some of which may extend beyond the school day. A separate consent form will be sent out for any residential or overseas visits and for adventurous activities (as defined by the local authority). Details of each visit will be sent to you in advance.

School, college or establishment	
Visit or activity	
Dates and times	
Name of child	Date of birth
Special details - any information about your child's health which may need special attention but does not prevent them from taking part should be noted below. (For example; any allergies, any medication needed and the dosage, travel sickness, diabetes, asthma or epilepsy?)	
Has your child had any relevant recent illness?	
Does your child have any specific dietary requirements?	
Do you have any additional comments?	
Swimming ability (for water-based activities) Is your child able to swim 50 metres? YES / NO	
Is your child water confident for the proposed activity? YES / NO	

Name of family doctor

Approximate date of last tetanus injection:

1. I would like my child to take part in this visit or activity and having read the information provided agree to him/her taking part in the activities described.
2. I consent to any emergency medical treatment required by my child during the course of the visit.
3. I confirm that my child is in good health and I consider him/her fit to participate.

Name of Parent/Guardian: _____

Signature: _____

Date: _____

Address: _____

Email: _____

Phone 1: _____

Phone 2: _____

Section to be completed by schools in compliance with General Data Protection Regulations. Schools may wish to add an explanatory paragraph regarding their data management and refer to their privacy notice and named Data Protection Officer [here](#).

Provider Standards Questionnaire (Form SOE5)

To be completed by providers of outdoor education, visits and off-site activities to schools and education establishments.

Insert Name of Provider Organisation HERE:

The provider named above is asked to give careful consideration to the statements below and sign in the space at the end of the form that the standard of service provided will meet the conditions listed. Please write YES to all specifications you meet. Write NO for any specification you cannot meet. Write N/A against any specifications which do not apply to your provision.

Section 1 To be completed by ALL Providers.

Section 2 To be completed by Adventurous Activities Providers

Section 3 To be completed by Tour Operators

Section 4 To be completed by Providers of Expeditions outside of the UK

Section 1 - All Providers		Write YES, NO or N/A
1	The provider has public liability insurance for a minimum of £5 million.	
2	The provider complies with the relevant health and safety regulations, including the Health and Safety at Work Act 1974 and associated regulations for visits/activities, and has a health and safety policy and recorded risk assessments which are available for inspection.	
3	Accident and emergency procedures are maintained, and records are available for inspection.	
4	The provider operates a policy for staff recruitment, induction and training that ensures that all staff with a responsibility for participants have the experience and competence to undertake their duties.	
5	There is a clear and communicated definition of responsibilities between the provider's staff and visiting staff regarding supervision and welfare of participants.	

Appendix 5

6	The provider has a Code of Conduct which will be employed where appropriate and supplied in advance of any booking. Visiting groups should adhere to the Code of Conduct.	
Staffing		
7	The provider has a safeguarding policy covering staff recruitment, induction and training. To support this policy all reasonable steps are taken to check staff/volunteers, who will have access to young people, for relevant criminal history and suitability for work with young people. (i.e., UK DBS checks)	
8	There are adequate and regular opportunities for liaison between school/organisation staff and the provider's staff to agree learning outcomes and to agree if necessary, any changes to the programme.	
Inclusion & Environment		
9	The provider will take all reasonable steps to allow inclusion and participation of any young people who have special needs or have a disability, following a risk assessment process in line with The Special Educational Needs and Disability Regulations 2014, and the Equality Act 2010.	
10	The provider encourages responsible attitudes to the environment and/or promotes wider sustainability issues as an integral part of the programme.	
Vehicles		
11	All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used.	
12	Where applicable drivers are PCV qualified or operate with a small bus permit and local minibus driving assessment.	
13	All drivers are appropriately insured and hold a valid licence to drive them on behalf of the provider.	
Accommodation & Buildings		
14	A fire risk assessment has been completed, reviewed appropriately and meets the requirements of the Regulatory Reform (Fire Safety) Order 2005 (where applicable).	
15	Security arrangements have been assessed and all reasonable steps taken to prevent unauthorised persons entering the accommodation.	
16	Separate male and female sleeping accommodation and washing facilities are provided. Staff accommodation is suitably located to ensure adequate supervision.	

Section 2 - Adventurous Activity Providers		Write YES, NO or N/A
17	The ratios of staff to young people for the activities confirm to those recommended by the appropriate National Governing Bodies (NGB) & LA, or, in the absence of this, the provider's Code of Practice informed by risk assessment.	
18	The provider maintains a written code of practice for activities, which is consistent with relevant NGB guidelines or in their absence, recognised national/best practice standards.	
19	Staff competences are confirmed by the appropriate NGB qualification for the activity to be undertaken, or staff have had their competences confirmed by an appropriately experienced and qualified technical adviser.	
20	The provider has assessed the first aid needs of employees and visitors/participants. There will be adequate and appropriate facilities along with access to a person with a valid and appropriate level of first aid qualification. Staff are practised and competent in accident and emergency procedures.	
21	All equipment used in activities is suited to the task, adequately maintained and monitored in accordance with statutory requirements and current good practice, with records kept on maintenance checks where necessary.	
22	Do you require participants to complete/sign any form of consent/waiver/disclaimer? IF SO, PLEASE SUBMIT A COPY OF YOUR FORM WITH THIS FORM	
23	Please state which national accreditation awards your organisation holds and the issuing body;	

Adventure Activity Licence Authority	
24	If you hold a licence from the Adventure Activities Licensing Authority (AALA), please write the licence number and expiry date here;

Section 3 - Tour operators / Package Holidays		Write YES, NO or N/A
Where tour operators deliver services using other providers e.g., ski schools, transport or accommodation, the tour operator must ensure that each provider meets the relevant specifications which apply to the country of operation.		
25	The Tour Operator complies with package Travel Regulations, including bonding to safeguard customers' monies.	
26	Security in the case of Insolvency - There is an on-going legal requirement to have sufficient evidence of security for the protection of pre-payments in the event of insolvency under The Package Travel, Package Holidays and Package Tours Regulations 1992. This states that businesses offering "packages" must be able to provide this evidence at all times. Please tick to confirm that this is understood and will be complied with.	
27	If abroad, the accommodation complies with fire, health and safety regulations, which apply in the country, concerned.	
28	ATOL, ABTA or other bonding body name and numbers:	

Section 4 – Overseas Expeditions or Fieldwork		Write YES, NO or N/A
29	The provider is a member of the Expedition Providers Association.	
30	The Provider holds the Learning Outside the Classroom Quality Badge	
31	The provider is accredited via the 'other party' route to meet the requirements of BS8848	

Name of provider organisation	
Name	
Position held (form to be completed by owner, director, manager)	
Signature	
Date	
Phone	
Email	
Website	

Thank you for completing this form. Please return it to: *(School or Establishment to enter return details here)*