

# Educational Off Site Visits

September 2019 ~ September 2022

## Policy & Guidelines



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# 1 Introduction

This document is written to comply with health and safety at work law. As an employer, Lancashire County Council has a statutory responsibility for health and safety. Employees also have responsibilities. This document, and the accompanying forms and appendices, sets out the County Council's safety policy for off-site educational visits and adventurous outdoor activities, and the arrangements for the implementation of the policy.

Evidence shows that educational/off site visits provide opportunities and benefits that are rarely realised in other educational contexts or settings.

The County Council is committed to supporting all user groups to achieve a rich and broad offer. Our vision is for all young people to enjoy appropriately planned off site visits and the life changing experiences they provide. The impact is generally greater when visit experiences are fully integrated with a school's curriculum/planning and ethos. The overwhelming evidence outlines numerous positive impacts educational visits can have on learning, behaviours, attitudes and personal development.

The revised Educational/Off Site Visits Policy and Guidelines document is applicable from September 2019. It is a controlled document and will be reviewed in three years' time subject to legislative changes or other advice that may require an earlier review. For the purpose of this policy, the term 'schools' refers to schools and all Lancashire County Council internal services

The most up to date information will be available on the EVOLVE website.

## What is an Educational/Off Site Visit?

Educational/off site visits are planned discrete **off site** educational experiences designed to enrich and enhance the curriculum. The policy does not apply to activities undertaken by establishments on their site. These activities should be conducted in accordance with the establishment's own policy and procedures. Included in the policy are field study visits, and any visit with an adventurous element to it.

For the purpose of this policy, curriculum swimming, sports fixtures and area school events are not educational/off site visits. For guidance on these areas of the curriculum, please refer to the separate advice including:

- National Governing Body Advice -Swim England  
<https://www.swimming.org/swimengland/>
- Association for Physical for Physical Education (AfPE) - Safe Practice in Physical Education, School Sport and Physical Activity 2016 edition. This book will be updated in September 2020 with a new edition of the publication
- Association for Physical for Physical Education (AfPE) - Safe Practice in Physical Education, School Sport and Physical Activity 2016 edition. This book will be updated in September 2020 with a new edition of the publication <https://www.afpe.org.uk/physical-education/safe-practice-in-physical-education-school-sport-physical-activity-2016/>

## 1.1 Identifying the Employer

Overall legal responsibility and accountability for all health and safety lies with the employer, and staff must follow the policy and guidance set by their employer. For this reason, it is essential to be clear who your employer is.

### In England and Wales

#### **The local authority (LA) is the employer in:**

- community schools
- community special schools
- voluntary controlled schools
- maintained nursery schools
- pupil referral units
- Local Authority Services

#### **The governing body or the board of trustees is the employer in:**

- foundation schools
- foundation special schools
- voluntary aided schools
- academies
- free schools

#### **The proprietor, Board of Trustees or equivalent is the employer in:**

- independent schools

All schools and education services within the authority, where Lancashire County Council is the employer, must comply with this policy and guidelines when undertaking educational/off site visits and are therefore directed to implement the arrangements in this document.

### **Voluntary Aided, Foundation, Free Schools and Academies**

The Governing Body is the employer in respect of voluntary aided, foundation, free schools and academies and holds the legal responsibility for health and safety.

All voluntary aided and foundation schools which are covered by Lancashire County Council's insurance arrangements are obliged to comply with the Council's policies and guidelines including the Educational Off/Site Visits Policy and Guidelines.

Failure to follow policy can have a detrimental effect on the ability of Legal Services to defend any claim that may arise in relation to the schools' activities. In such circumstances the costs of defending claims may be deducted from the school budget.

It is a mandatory requirement that academies and free schools which have purchased the Educational/Off Site Visits package adopt the Lancashire Educational/Off Site Visits Policy and Guidelines.

This Policy document should be read in conjunction with the current editions of the following electronic documents which are recommended reading for any school/service involved in the planning, organisation and supervision of educational/off site visits and adventurous activities and to which various references are made:

- Glenridding Investigation and Case Study: [www.hse.gov.uk/aala/glenridding-beck-investigation.htm](http://www.hse.gov.uk/aala/glenridding-beck-investigation.htm)  
<http://www.hse.gov.uk/aala/glenridding-beck.htm>
- 'Health and Safety: Advice on legal duties and powers' (DfE) <https://www.gov.uk/government/publications/health-and-safety-advice-for-schools>
- Health and Safety Executive (HSE) School Trips <http://www.hse.gov.uk/services/education/school-trips.htm>

## 1.2 Risk Management

All activities involving young people learning outside the classroom are associated with the possibility of misadventure. Safety for educational/off site visits and for outdoor adventurous activities is critically dependent on the quality of leadership. This policy aims to minimise the potential for misadventure, but it must be recognised that risk cannot be totally eliminated. Challenge must always be appropriate and risk reduced to an acceptable level.

For any activity or event, the same principles will always apply:

- **Purpose**
  - The educational purpose of the visit
- **People**
  - Who is going?
- **Context**
  - Where will it take place and with what?
- **Organisation**
  - How will it be managed and organised?  
(See Risk Assessment Form 5)

## 1.3 Monitoring

### Responsibilities of the County Council

The County Council has a duty to safeguard its employees in the course of their employment, and to ensure the safety of others who may be affected by the actions of its employees.

This includes a responsibility for the safety and well-being of all adults and young people participating in Educational/Off Site Visits. To ensure that these responsibilities are met, the County Council will:

- Maintain a policy and procedures governing educational/off site visits
- Provide guidance and competent advice for educational/off site visits
- Provide training and CPD opportunities for EVCs and other staff
- Monitor Type A and Type B Educational/Off Site Visits on a sample basis
- Reserve the right to monitor the venues/providers on a sample basis
- Review the Educational/Off Site Visits Policy and Guidelines at least every three years

### Professional Support Visits

The Professional Support Team will join groups on Type A and B visits on a sample basis. This is in the interest of quality assurance and support for the school and provider. For this purpose, the Professional Support Team will use the 'Visit Observation Form' (VOF), which is located in the Resources section on the EVOLVE website. The school will receive a report following the visit, and will have an opportunity to contribute to 'View our Visit' on the EVOLVE website.

**Note: Any member of the Professional Support Team has the power to intervene where unsafe practice is observed or it is felt likely to occur.**



## 2 The Planning and Approval Process for Educational / Off Site Visits

Before planning and undertaking educational/off site visits all schools must ensure that a member of staff has been nominated to the role of Educational Visits Co-ordinator (EVC) and is registered with the County Council. It is a mandatory requirement that all newly appointed EVCs attend the Lancashire Educational Visits Co-ordinator Training Course ('Educational /Off Site Visits Role, EVC 101). Delegates must attend the full day to receive the accreditation. The course is fully discounted under the Service Level Agreement (See Appendix 1). The appointment, training and continuing professional development of EVCs is tracked and the school must inform the Educational Visits Team of any changes to the appointment of the EVC.

### 2.1 Types of Visit

#### Type 'A' Visits (approval by the school/service)

Educational low risk off-site visits, up to one-day duration, for example:

- Theatre visits
- Most field study visits
- Museum visits.

#### Type 'B' Visits (require approval by the County Council)

Educational/Off Site Visits:

- Involving a planned activity on water, or in which the presence of water is identified as a hazard on the risk assessment\*. Travel on a ferry is regarded as a form of public transport and is therefore not necessarily a hazard

- Involving adventurous activities\*\*
- To farms
- To theme parks
- To trampoline parks and non-curriculum one off sessions
- Involving overnight stay or residential accommodation or overseas visits including foreign exchange visits
- London day visits and other multi venue city visits

*\* If the visit involves swimming as a planned activity, please refer to Appendix 9*

*\*\* The following are examples (not an exhaustive list of such activities)*

- Paddle sports; canoeing, kayaking, stand up paddle boarding
- Mountain sports; climbing, hillwalking, scrambling, gorge walks, 'river' walks
- Caving; including show caves/ tourist mines
- Motorsports; karting, MX riding, quad biking, BMX riding
- Artificial climbing structures; walls, high/ low ropes
- Snow sports; skiing, boarding
- Water sports; sailing, power boating, SCUBA diving, kite surfing, wild swimming
- Horse riding
- Ice skating
- Archery
- Activities with armed forces

**Further clarification and advice should be sought from the Educational Visits Team if there is any doubt about the classification of an activity**

### Type A Visits

Approval for Type A visits must be obtained within the school. Responsibility for the approval of Type A educational/off site visits rests with the Management (Governing Body/ Management Committee/Manager).

The Management arrangements for the approval of visits must be established and reviewed annually. Within these arrangements, authorisation to approve visits may be delegated, e.g. to the Headteacher/ Manager/EVC.

Any delegation of authority must be recorded in writing. In the case of schools, Governing Bodies and Management Committees, this must be included in the annual return to the County Council in the Summer Term.

### Type B Visits

It is the responsibility of the Management to ensure that approval is obtained from the County Council for all Type B visits.

In seeking approval for an educational/off site visit, submission must be made to the Educational Visits Team, via EVOLVE, at least 4 weeks prior to the visit taking place.



## Approval of Visits

Visit  
Leader

- Create a visit on EVOLVE.
- Type A Visit - Ensure that when completing the 'Visit Type' section, 'No' is selected for all points.
- Type B Visit - Ensure that when completing the 'Visit Type' section, select 'Yes' to one or more of the points.
- Submit visit to the EVC, they will receive an email notification that a new visit has been submitted.

EVC

- Check the visit form and attachments, a Form 5 must be attached.
- If satisfied with this, click the 'Submit' button at the bottom of the visit form, the form will then be sent to the Headteacher/Manager for approval.
- If not satisfied with this, click the 'Return' button at the bottom of the visit form, stating what is required from the Visit Leader. The form will then need to be resubmitted the form once the request has been actioned.
- If the Headteacher/Manager has delegated their responsibilities to the EVC, then the processes for the Headteacher will also need to be followed.

Head

- In the 'Track' tab, visits requiring approval will appear in the 'To be approved' tab.
- Open the visit to be approved by clicking the 'purple' icon.
- Click the 'Authorise' button at the bottom of the visit form, confirm the required declarations and enter pin number to approve/submit to the Educational/Off Site Visits Team.
- Type A visits are to be approved by the Headteacher, this visit can now take place.
- Type B visits must be approved by the Educational/Off Site Visits Team, this visit will now show on the 'submitted' tab. Once this is approved, it can then take place.

LA

- Once the visit is approved by the Educational/Off Site Visits Team, the visit will appear in the 'Approved' tab.
- Further information may be required, this will be requested via the 'Add note' function on EVOLVE.
- If the visit is returned to you, please action the request and resubmit.



## 2.2 Children's Residential Services

Please refer to Appendix 12 for the relevant approval arrangements.

## 2.3 Duke of Edinburgh's Award Scheme

Additional information is provided on EVOLVE for schools involved in this programme.

## 2.4 Risk Assessments

The risk assessment should be seen as fundamental to the overall planning process and should be considered from the outset of any visit planning. Risk assessment recording should not be unduly onerous, but supportive and helpful for the visit leadership team.

A proportionate approach to risk management, which, in the context of outdoor learning and off-site visits, is a two stage process:

- The identification of the potential benefits to be gained from an activity, along with any risks to the health and safety of those involved
- The implementation of a plan to best realise these benefits, using professional judgement to ensure that the level of risk does not exceed that which can be justified by the benefits

The Risk Assessment process must be seen as 'on-going' and 'dynamic'. Professional judgements and decisions regarding safety will need to be made regularly during the activity. If the control measures are not sufficient, the activity must not proceed.

## 2.5 A Planned Alternative Programme (Plan B)

Always prepare a 'Plan B'. This is in place in the event of unforeseen circumstances for both Type A and B visits. The more complex the visit, the more detailed the Plan B must be. Ensure all accompanying adults are aware of the Plan B.

If the alternative is that the visit is cancelled and the party returns to base, then this should be stated.



## 2.5 Good Practice Visit Essentials

### 2.5.1 Informed Parental/Carer Consent

A signed parental/carers consent form must be obtained, together with the relevant up to date medical information for all young people participating in any educational/off site visit. Unless consent has been obtained, a child/young person must not take part in the educational/off site visit.

For Type A visits, this could be done by using a general consent form at the beginning of a year, or even upon registration of a young person with the school/service (Sample Form 3A). It is, however, still a requirement that parents/carers must be informed of individual off-site visits in advance, and advised where their young person will be, and of any extra safety measures or clothing required. Schools must, however, be aware of the need for up to date medical information and must build in a way to obtain this and incorporate it into their process.

For every Type B visit specific written consent and full medical information must be obtained (Form 3B). In order that parental/carers consent can be fully informed, it is important that the school provides full information regarding all activities to be undertaken on the visit (Sample activity sheets are available in the Resources section of EVOLVE).

If there is to be a linked programme of such visits, it may be appropriate from the outset to obtain parental/carers consent for the linked programme.

### 2.5.2 Special Educational Needs and Disabilities (SEND)

Your school should adhere to the following principles:

- A presumption of entitlement to participate for all young people
- Ensure accessibility through direct or realistic adaptation or modification
- Integration through participation with peers

It is unlawful to:

- Treat a young person less favourably because they are disabled
- To apply a policy, practice or procedure that has the effect of disadvantaging young people with disabilities without justification
- To treat a young person unfavourably due to something arising from their disability without justification or to fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification

## 2.6 Off Site Visit Emergencies

The Base Contact and the Visit Leader must have:

- The establishment's emergency response procedures and be familiar with them
- Form 9 (Base Contact), Form 10 (Visit Leader)

- Telephone numbers (both in and out of hours) of two designated senior members of staff
- Mobile numbers of all accompanying adults on the visit. Together with names, addresses and telephone numbers of parents/carers of all of the young people and the same details for the next of kin of all accompanying adults involved in the visit
- Consideration of communication issues to ensure alternative effective communication is maintained.
- Copies of the medical information for every young person taking part in the visit/activity (and parental/carer consent for Type B visits)
- Copies of route plans, venues and alternative activities (Plan B)
- Appropriate vehicle registration numbers and passenger lists for each vehicle
- Copies of the Risk Assessment (Form 5)
- For critical incidents, the telephone numbers of the Lancashire Emergency Duty Team (Appendix 6)

## 2.7 Visit Closed Procedure

The Visit Leader must ensure that there is a clearly defined and agreed arrangement with the Base Contact to confirm the closure of the visit. These arrangements should clearly state what action must be taken by the Base Contact if the party has failed to return or make contact by the agreed time.

The Visit Leader must communicate any delays or incidents that may cause late arrivals at destinations or return journeys to the Base Contact.

## 2.8 Post Visit Evaluation (PVE) for all Type A and Type B visits

A Post Visit Evaluation must be completed on EVOLVE once a visit is closed. Schools should keep records of individual visits including what worked well, what didn't and any accident/incident reports.

- If a type A visit which has not been processed on EVOLVE has a nil return this should be recorded and filed with the visit records. If there has been an incident/accident or near miss, a Form 4 should be submitted to the county council and a copy filed with the visit records
- For all type A and B visits which have been processed on EVOLVE, the Post Visit Evaluation section on EVOLVE should be completed within 14 days of the visit

An evaluation report of all educational/off site visits should be made to the management as part of the monitoring procedures.

There may be an incident or situation that could be classified as a 'near miss' or 'close call'. It is important to discuss this with experienced colleagues enabling all parties to learn from the experience and inform future actions. This should be recorded on EVOLVE as a note to the LA.

**Note: Failure to complete the Post Visit Evaluation may leave the school vulnerable to legal action.**

## 3 Supervision

Every person has a duty of care for the welfare and safety of all young people taking part in an educational/off site visit to ensure the safe return of the party.

**Every person has a duty to intervene where unsafe practice is observed or it is felt likely to occur. Every adult accompanying the visit must have a role.**

**Effective Supervision is about fulfilling your duty of care. School staff should ensure that young people are supervised effectively.**

When planning supervision they should take into account:

- The planned learning outcomes or benefits of the activity/visit
- The nature of the activity (including its duration)
- The location and environment in which the activity is to take place
- The age, maturity and gender of the young people to be supervised
- The attitudes and behaviours of the young people (including their medical, emotional and educational or additional needs)
- Staff competence and experience

Any supervision plan should reflect the group's uniqueness. It is, therefore, important that when planning a repeat or on-going series of activities, the previous plan (no matter how well it worked) is reviewed to ensure that it meets the current group's needs. Higher levels of responsibility will normally be assigned to teachers/young people's workers than to volunteers, and a higher standard of care is expected of them.

### 3.1 Important Notes for Supervision

- **Residential visits and any visit abroad.** It is strongly recommended that the ratio should never be less than 1:10
- **Visits to remote areas or involving hazardous activities.** The risks may be greater and supervision levels should be set accordingly
- **Normal practice** is that there are **a minimum of two competent adults** accompanying any visit or activity. For schools, one **must** be a teacher. For the Children, Families and Wellbeing Service (CFW) one **must** be a young people's worker/children's centre worker. In the case of children's residential establishments for Type B visits, this should never be less than two Residential Child Care Workers

- **An exception to a teacher always accompanying a group** would be for Type A small group visits, such as intervention activities. This is common practice in Short Stay and Special Schools. Visits such as these may be led by experienced and competent school staff, but **must** be under the supervision and direction of a qualified teacher
- **Visit Leader is accompanied by their own child.** If any member of staff is accompanied by their own child/ren it is recommended they should not be the Visit Leader. In this exceptional circumstance, a suitably experienced assistant leader should be identified in the party who will be able to take over in the case of any emergency (See 3.1 on page 10)
- **Own child/ren.** This person **must** also be discounted for the purpose of calculating the adult:child ratio
- **Mixed groups.** There should be adults from each gender. In circumstances where this is not possible, it should be explicit in the Risk Assessment as to how the issue will be addressed and parents/carers should be informed of the measures taken
- **Disclosure and Barring Service (DBS) checks** and safeguarding requirements **must** be fulfilled. This includes UK hosting families as part of homestays on exchange visits. DBS checks must be undertaken in respect of any additional adult accompanying the visit. If this is not done, arrangements **must** be made to ensure that there is no possibility of that person having unsupervised contact with the children/young people
- **Related Adults.** If any member of staff is accompanied by an adult with whom they have a close connection, it is recommended that they should not be the Visit Leader. This person must also be discounted for the purpose of calculating the adult:child ratio
- **Emergency Base Contact.** If they have a relative or child on the visit, consideration should be given to appointing an alternative base contact or a contingency plan
- **Adult without a role.** An adult who does not have a role on the visit must be discounted for the purpose of calculating the adult:child ratio. Lancashire County Council's insurance arrangements will not provide cover of any sort in respect of additional persons or children
- **Additional Persons.** Lancashire County Council takes the view that responsibility for the health, safety and welfare of such additional persons or child/ren lies entirely with the adult who has brought them, and not with the other accompanying adults or with Lancashire County Council
- **Schools delivering adventurous activities using their own staff.** If these activities fall under the scope of the AALA regulations and external pupils/ young people are offered a place on the activity then there may be AALA licensing implications. Examples of such activities could include (but are not exclusive to) D of E ventures in typically 'gold' terrain, certain paddle sports, caving or domestic snow sport visits



### 3.2 Ratios

**The staffing required to run the visit safely needs to be identified through the Risk Assessment process (Form 5) rather than a simple numerical calculation of ratios. It is important to have a high enough ratio of adult supervisors to children/young people for any visit.**

The factors to take into consideration include:

- Gender, age and ability of group
- The nature of the activities to be undertaken
- Duration and nature of the journey
- Competencies of individual staff and volunteers
- Competence and behaviour of children/ young people
- Any disabilities, special educational or medical needs
- Experience of adults in off-site supervision
- Type of any accommodation
- Ability to respond to emergencies, including first aid cover
- The requirements of the organisation/ location to be visited

#### Minimum Ratios Acceptable on Any Visit (See 'Important Notes', left)

##### Pre-school/ Reception/ Foundation:

Staffing arrangements must meet the needs of all children and ensure their safety. Providers must ensure that all children are adequately supervised and decide how to deploy staff to ensure that children's needs are met.

##### Years 1 to 3:

1 adult for every 6 children.

##### Years 4 to 6:

1 adult for every 10 children.

##### Years 7 and above:

1 adult for the first 10 children/young people and then one additional adult for every 20 students, or part thereof.

##### Post 16 years:

The risk assessment process should decide the ratios, taking into account the activity to be undertaken and the age and maturity of the students.



### 3.3 Accompanying adults and the supervision of Educational/ Off Site Visits

Accompanying Adults refers to adults accompanying the visit, this could be Lancashire County Council staff, workers, teachers, teaching assistants, parent volunteers and adult volunteers. In some cases it may be that related adults, adults with a close personal relationship or close family members form part of the accompanying adults assigned to support the visit.

This situation must be carefully considered as part of the risk assessment process.

Examples of this would be where married staff/staff in a relationship, or both in attendance, or where a teacher and their parent (adult volunteer) forming part of the accompanying adult team leading the visit.

These two examples are not exhaustive and it must be clearly recognised by visit leaders the potential impact of planning a visit involving related adults. The full implications on staffing are often only considered when an incident or accident affecting one of the related individuals takes place.

With any educational/ off site visit where there is a recognised close relationship involving any of the accompanying adults, there is an expectation that the submitted risk assessment would consider how any injury or illness to one of these people could impact on the visit.

**Staff Qualifications.** Where the accompanying adults who have a recognised close relationship are the qualified people present on the visit, an incident involving one of these individuals could result in the visit being abandoned due to lack of appropriately qualified staff being available. This is likely to be the case for some outdoor adventurous activities and Duke of Edinburgh expeditions. Staffing in these contexts needs to be considered early in the planning stage, and when identifying staff to gain accreditation to lead activities.

**Safeguarding.** Appropriate DBS checks **must** be undertaken in respect of any additional adult accompanying a visit. If this is not done, arrangements **must** be made to ensure there is no possibility of that person having unsupervised contact with the children/ young people

### 3.4 Remote Supervision / Unaccompanied Activities

Remote supervision (as opposed to direct or close supervision) usually occurs when, as part of planned activities, a group works away from the supervising staff but is subject to stated controls. Staff, even though not physically present, remain fully responsible for the safe management of the young people and this is a reasonable practice based on a rigorous assessment of risk.

This preparation may include involving them in a simple risk assessment exercise such as:

- What could prevent us from all arriving back at the coach on time?
- What do we need to do to ensure that we all arrive at the coach on time?

All participants (both young people and staff) should be sufficiently and appropriately prepared for the task/activity being undertaken and their performance regularly monitored when using remote supervision as a group management strategy. There should be fully informed consent obtained from the parents/ carers, and clear expectations understood by all.

Examples of type of visit where remote supervision takes place include:

- Theme parks
- Duke of Edinburgh ventures (see D of E notes on Evolve)
- Town/village studies
- Orienteering events
- Foreign exchange visits

Stated controls identified by the risk assessment may include:

- Establishing effective lines of communication which allow any necessary required assistance to be rendered in a timely manner
- Identifying a meeting point constantly staffed (often on a rota system)
- Regular 'check-ins' by young people
- Staff visibly patrolling the venue
- Buddy systems. (It is suggested that groups are at a minimum of three)

Training for staff is available through the Duke of Edinburgh Scheme and Mountain Leader Training. (See EVOVLE website)

### **Responsibilities of All Staff who lead or instruct their own groups in Adventurous Activities**

Staff **must** be approved and registered by the County Council prior to leading or instructing their own groups in Adventurous Activities. Applicants are required to hold the relevant National Governing Body Award qualifications or have site-specific approval for those activities (assessed by a Technical Adviser). See the Instructor Pack for guidance (in the resources section of the EVOLVE website). To apply for approval, staff must forward a completed Form 6 together with the relevant documents, to the Educational Visits Team.

## **3.5 First Aid**

First aid which is appropriate to the activity being undertaken should be available and accessible at all times. The level of first aid cover and the number of qualified first aiders required will be identified by the risk assessment (Form 5).

For most type A visits, it will be sufficient that the Visit Leader has a good working knowledge of first aid and a suitably stocked first aid kit is carried. For type B visits, it is generally a requirement that a suitably qualified first aider is present at all times when the group is off site. On any visit, all adults in the group should know the emergency arrangements (Form 10) and how to contact the emergency services.

It is good practice that records are kept of staff first aid qualifications. There should be regular checks that these qualifications are current.

**If any member of staff regularly undertakes Educational/Off Site Visits, it is strongly recommended that they attend appropriate first aid training.**



## 4 Providers of Activities

### 4.1 Centres and Providers of Activities

Where schools use an outdoor activity provider with a current Adventurous Activities Licensing Service (AALS) licence, they can be assured that staff delivering activities will be appropriately managed and qualified.

**Current Registered Centres and providers of activities** are held by Lancashire County Council. This includes all Lancashire Outdoor Education Centres. The list is posted in the Resources section on EVOLVE and all centres/providers are re-registered every two years. Activities at all registered centres/providers have been fully risk assessed by the centre.

**Public Liability Insurance.** All centres/providers are required to have adequate insurance cover. This is checked annually by Lancashire County Council to ensure all registered centres/providers on our list have current valid insurance.

**Provider Risk Assessments.** If it is proposed to undertake activities at a registered centre/provider, **it will not be necessary** to carry out a Risk Assessment in relation to the activities undertaken at the centre/provider subject to:

- Centre staff being responsible for leading the activities
- The activity forming part of the centre's/provider's registration
- Compliance with all terms, conditions and requirements as notified by the centre/provider in its booking and contract documentation, and with any directions given by the centre staff

### 4.2 The process for visits to registered centres/providers:

- Submit the on-line application via EVOLVE.
- Ensure that the accompanying risk assessment (Form 5) covers the transport arrangements, non-centre-programmed activities, downtime and information on behaviour management and group needs

**The duty of care throughout an Educational Off-Site Visit is always maintained by the school/service** and they retain the responsibility for:

- Travel to and from the Centre (Appendix 5)
- The downtime/ evening programme
- Overnight supervision
- Supervision at meal times

**Using a centre/provider which is not yet registered with Lancashire County Council.** If it is proposed to use a centre and/or provider not registered with Lancashire County Council, the school must contact the Educational Visits Team early in the planning stage so that the registration process can be initiated.

Lancashire County Council will send a Form 7 to the new centre/provider. This must be completed and submitted to the Educational Visits Team. Centres and providers offering 'in scope' activities (AALS) **must** be licensed.





### 4.3 Important notes for using external providers and venues

- When a provider is used, ensure that there is a clear contract/ agreement in place about what they are responsible for (supervision/ activities). This must be clearly established for each stage of the day
- Providers are not responsible for producing a risk-benefit assessment for individual visiting groups – this is the responsibility of school/services and the visit leaders who will know the needs of their groups
- What is useful to a visit leader is information from the provider that helps the visit leadership team to make best use of the facilities or venue, and to plan appropriate supervision for their particular group
- Any equipment or resources provided by the centre/provider must be used in accordance with any instructions given
- Consider making a preliminary visit. It is useful for a visit leader to take pictures on a pre-visit, as photographs can be a great aid to briefing both colleagues and the participants. Where a pre-visit is not reasonably practicable, you should consider how you will gather sufficient information to make an adequate assessment of the venue, facilities or provider

# 5 Emergency Procedures

**Note: All Visit Leaders should familiarise themselves with the emergency procedures, including those of any centre/venue.**

## 5.1 Developing Your Off-Site Visits Emergency Procedures

Your visit plan should be comprehensive, clarifying the roles and responsibilities of all visit staff in the management of an emergency. It will be a pre-planned response which is set in motion, at given triggers and is fully understood by all visit leaders and their staff.

When developing your plan, it is good practice to do the following:

### Staff training

This should happen in the initial stages and again once the plan is complete.

### Identify key staff

Being involved in an emergency can be extremely demanding. It is important to ensure that the staff selected for specific roles are competent.

**Outline actions to be taken by the Base Contact and designated senior members of staff.**

Having been informed by the Visit Leader that an incident, accident or emergency has occurred and that the emergency procedures are in operation, the Base Contact should refer to Form 9 and inform one of the two designated senior members of staff.

The senior members of staff should alert the Manager, and for major incidents the Lancashire Emergency Duty Team (Appendix 6), giving details of the critical incident.

The Manager or County Council Officers may identify further actions or help required e.g. media communication, alternative and additional telephone lines, emergency feeding, transport and further support from the Authority as identified.

## 5.2 Contact lists

Keep up-to-date lists of contact telephone numbers and addresses securely, but readily accessible, in more than one place and keep them in hard copy as well as electronically. A copy of the list should be kept at school and at least one copy should be taken on the visit.

**This is not a breach of GDPR regulations.**

These must include contact details (including next of kin) of members of staff who have specific functions within the plan, as well as of young people's parents. Staff need to be aware of where the lists are kept and an identified member of staff should be specifically responsible for keeping the lists up to date and ensuring any changes are made to all copies.

### Outside organisations

Consider whether there are outside organisations/agencies which you may need to contact (e.g. insurance, legal advice, counselling, corporate communications to support the emergency response) and include their contact numbers on your list.

### Communication issues

Consider the possibility that you will need alternative/additional telephone lines during an Emergency. An alternative to the main school line should be available to ensure on-going communication is possible.

## 5.3 Responsibilities of the Base Contact

It is strongly recommended that training be provided for any member of staff who may act as the Base Contact during a visit. This is a challenging role requiring specific competencies.

**Note: The Base Contact must not accompany the Educational/Off-Site Visit.**

The Base Contact **must**:

- Make arrangements to be accessible throughout the duration of the visit
- Ensure compliance with the emergency procedures as set out in Section 2
- Clearly understand the 'visit closed procedure' (Section 2)

### Reviewing the emergency plan

Once the plan is operational, the Visit Leader and the Base Contact need to regularly review and update its details. The purpose is to ensure that staff move automatically into emergency mode when an incident occurs.

## 5.4 Notes regarding the Media

Corporate Communications Team must be contacted as soon as possible. (Appendix 6). Direct all media requests to this team.

Visit Leaders, accompanying adults or any group members should not discuss any matter relating to an incident, accident or emergency with the media until contact has been made with Base Contact.

**Note: Under no circumstances should the name of any casualty be divulged to the media. For the planned telephone communications to remain effective, it is essential these telephone numbers are not made available to parents who will over-burden and compromise the system.**





## 6 Duties and Responsibilities

### 6.1 Responsibilities of the 'Management' (i.e. Governing Body/ Management Committee/ Manager)

The 'Management' must have a written policy for the effective and safe management of educational/off site visits. Members of the Management should view their main role as being 'to enable and ensure' otherwise described as being a 'critical friend'.

This policy should include:

- The adoption of procedures for the management of educational/off site visits, consistent with Lancashire County Council's requirements
- The nomination of the Headteacher or senior member of staff to undertake the duties listed in Section 6.2 opposite
- A requirement that all educational/off site visits have specific stated objectives which are appropriate for the participants
- Clear arrangements for the approval of educational/off site visits. This may allow for approval by Headteacher/ Manager/Educational Visits Co-ordinator (EVC)
- (Schools only) A charging and remissions policy
- To ensure that under the school's duty of care, a clear decision on the consumption of alcohol by any person during the visit
- To ensure that smoking does not take place (including electronic cigarettes)
- Procedures for responding to a critical incident/emergency, consistent with Lancashire County Council's requirements (Section 6 and Appendix 3)
- To ensure that there are arrangements for the monitoring and evaluation procedures of visits/activities and compliance with Lancashire County Council's procedures

Within schools, the Governing Body may wish to nominate a governor, preferably with relevant experience in this area, to assist the Headteacher or EVC in monitoring the school's procedures.



## 6.2 Responsibilities of the 'Manager' (Headteacher/ Manager/ EVC)

The 'Manager' is responsible for ensuring that all activities are properly planned and appropriately supervised and that Lancashire County Council's policies are implemented. The Manager is also responsible for ensuring compliance with the Management's operational procedures.

Managers, with the approval of the Management, may delegate some or all of their tasks and functions to a senior member of staff, nominated as the EVC. This person should ideally have experience as a Visit Leader over a number of years, and experience of participating in the range of different types of visit organised by the school/ service.

### **The 'Manager' (Headteacher/ Manager/ EVC) retains the overall responsibility for the following:**

- Ensuring that the planning of visits complies with the County Council's Educational/Off Site Visits Policy and Guidelines and with the Management's operational procedures
- Providing a varied programme of opportunities which are structured and progressive
- Ensuring that the risk assessments (Form 5) are undertaken by the Visit Leader. The risk assessment should identify any children/young people with cultural requirements, disabilities, special educational or medical needs and, so far as possible, ensure these needs will be met
- If there is any swimming during the activity, this must be specifically addressed in the risk assessment and will require the presence of a qualified life-saver. (Appendix 9)
- Ensuring that visits are planned in such a way as to provide adequate supervision at all times. In the case of a residential visit, this will mean that supervision is provided by the school/ service 24 hours a day
- Making sufficient time and resources available for the EVC to arrange induction and training of staff and accompanying adult. This should include opportunities for staff to develop competence in dynamic risk management by assisting more experienced colleagues on a range of educational visits and by attending relevant training courses
- Verifying the competence and suitability of the Visit Leader and accompanying adults, taking account of the planned arrangements for the visit and the number and nature of the group involved. The personal qualities of the individuals concerned are equally as important as any formal qualifications
- Ensuring that appropriate Disclosure Barring Service (DBS) checks and safeguarding requirements are fulfilled (Appendix 4)



- Ensuring that the EVC/Visit Leader is allowed sufficient time to organise the visit
- Ensuring that transport arrangements are appropriate and that risk assessments also take account of traffic hazards where the visit involves crossing roads (Appendix 5)
- Organising and monitoring the induction and ongoing training of Visit Leaders and accompanying adults to ensure that proper support systems are in place to cope with incidents, emergencies and critical incidents. (See Section 5)
- Organising emergency planning for Educational/Off Site Visits and ensuring that Base Contact arrangements are made (Forms 9 and 10)

**Note: the Base Contact must not accompany the Educational/Off Site Visit (Section 4.6).**

- Ensuring that a senior member of staff on the visit is nominated to co-ordinate any child protection duties (Appendix 2)
- Monitoring visits, including accident and near miss reporting, and review and review visit arrangements and outcomes. This evaluation will inform future visits and staff training needs. (Section 7)
- Ensuring the Post Visit Evaluation is completed and submitted as required. (Section 7)

### 6.3 Responsibilities of the Visit Leader

The Visit Leader must recognise that whilst leading the visit s/he is in effect representing the Management. The Visit Leader must:

- Obtain the Manager's approval for the visit/activity, according to Lancashire County Council's and the establishment's procedures.
- Ensure that the ratio of staff to children/young people is appropriate for the environment /activities and needs of the group
- Ensure that adequate arrangements are implemented for the safety and well-being of all participants, including accompanying adults, whilst on the visit. In respect of residential visits, adequate supervision must be provided 24 hours a day
- Ensure the overall maintenance of good order and discipline during the visit
- Ensure compliance with the emergency procedures (as set out in Section 5) and ensure that all accompanying staff are familiar with this procedure
- Ensure that all members of staff and accompanying adults are fully briefed as to their roles and responsibilities
- Ensure that group leaders are appointed with proper regard to their experience and competence to undertake the tasks assigned to them

- Undertake the completion of the risk assessment (Form 5).

The risk assessment should:

- Identify young people with cultural requirements, disabilities, special educational or medical needs
  - Identify and record significant hazards and the safety measures required to reduce risk to tolerable level
  - Make known to parents/carers, the Manager /Management the level of residual risk that needs to be managed.
- If there is any swimming during the activity, this must be specifically addressed in the risk assessment and will require the presence of a qualified lifesaver. (Appendix 9)

- Ensure that parents/carers are fully briefed about the arrangements for the visit. This includes Plan B. Ensure that a signed parental/carer consent form has been obtained, together with all the relevant medical information for all young people participating in the educational/off site visit. (Form 3, 3A or Form 3B)
- Seek appropriate assurances from the provider/centre and ensure that there is a clear contract/agreement in place about who responds to what
- In respect of all visits organised by Children, Family and Wellbeing Service the Visit Leader must contact the Base Contact to confirm staff and young people numbers before any visit can commence
- Complete the Post Visit Evaluation on EVOLVE
- Monitor visits, including accident and near miss reporting, and review visit arrangements and outcomes. This evaluation will inform future visits and staff training needs. (Section 2)

In addition, the Visit Leader is responsible for ensuring that participants conduct themselves with due respect for the environment and the local community, particularly when not directly supervised.



## 6.4 Responsibilities when arranging transport

Further guidance is found in Appendix 5 and EVOLVE, but Lancashire County Council requires the following:

### 6.4.1 Minibuses

- Any member of staff or volunteer driving a minibus must hold a Category D1 entitlement on their driving licence
- Where a driver passed their driving test after 1st January 1997 and have since gained a full D1 or D licence they must also have a Driver Certificate of professional Competence (DCPC) and keep it up to date. \*DCPC's are valid for five years
- All seats must be forward-facing and fitted with seat belts
- Trailer use must comply with national licence requirements
- Where a trailer is in use the rear door over the tow bar will not be accepted as an emergency exit and an alternative emergency exit must be available
- Vehicles with all age seat belts are recommended

### 6.4.2 Bus/Coach Hire

- The operator must hold a PSV Operator's licence, appropriate to the type of vehicle and/or nature of the journey being undertaken
- The vehicle must display the operator's license disk in the front window of the vehicle
- Every passenger must have their own seat. All coach seats must be fitted with seat belts

### 6.4.3 Children/Young People being transported by Staff/ Accompanying Adults /Young People in their own vehicle

- Drivers must hold a current valid driving licence (Form 8A)
- It must be confirmed that there is appropriate insurance cover for the driver's use of the vehicle
- Parents/carers must have consented to their child/ren being transported in this way (Form 8B)
- Vehicles must be fitted with seatbelts, which must be used
- Booster seats must be used as required by law



# Educational Off Site Visits

Policy &  
Guidelines

