



Durham County Council
Children and Adults Services

Policy and Guidance:
Educational Visits, Off-Site Activities and On-Site 'Adventures'

November 2015

FOREWORD

Learning outdoors is an important part of every young person's development in the broadest sense. Children and young people may return stimulated, enthused and with much greater knowledge about themselves, their own physical skills and a deeper understanding of the environment they live in.

In Children & Adult Services (CAS) there are many opportunities for children and young people to experience challenging, rewarding and exciting visits and activities. The range of opportunities is increasing, with many new and exciting locations to visit and greater opportunities for learning outside the classroom. Such activities, when planned as part of the school curriculum, are proven to contribute to the raising of achievement. Such activities of course form an equally important and valued element of the programme for a wide variety of settings including youth groups and Nursery settings.

Large numbers of children and young people in County Durham enjoy a wide range of visits and off-site activities each year. An increasing number of schools and settings are using their own grounds for 'adventure'. Almost all take place without incident, and CAS employees including school staff are encouraged to continue to organise visits and activities with the same high level of safety for children and young people in their care.

This document aims to provide clear guidance for organising educational visits and off-site activities. It contains advice and guidance for CAS establishments, and links with both current Department for Education advice and notably the 'National Guidance' published by the Outdoor Education Advisers Panel. Cross-references are made throughout this publication.

It is not intended that this updated policy will reduce the number or range of educational visits and off-site activities but encourage continued safe practice for, and by, all involved.

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2015

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A Background and Legal Information

- A.1 Durham County Council (The Council) acknowledges the immense value of educational visits to children and young people, and fully supports and encourages all off-site activities that are correctly planned, managed and conducted. We believe that all establishments should strive for **high quality** educational visits in order to maximize the educational benefits to the children and young people taking part.
- A.2 The Council acknowledges the [DfE advice 'Health and Safety: DfE Advice on legal duties and powers for local authorities, Head teachers, staff and governing bodies' February 2012](#). However, we consider that this most recent advice alone is insufficient as a basis on which schools and other settings can expect to make essential decisions while planning and enjoying off-site and outdoor visits.
The Council is pleased however to recommend the extensive advice offered through the Outdoor Education Advisers Panel - www.oeapng.info.
- A.3 This Council guidance has been produced to make visits enjoyable, rewarding and as safe as possible. It summarises the procedures which should be followed by all Council employees in the management of visits and similar off-site activities within Education. Information contained in this guidance document applies to all staff and volunteers working in Council establishments including:
- Nursery schools, infant, junior and primary schools, secondary schools and special schools
 - School sport partnerships
 - Youth groups
 - Duke of Edinburgh's Award Groups in County Durham
 - All Extended School Provision
 - All CAS (Education) services
- A.4 Schools are reminded (in accordance with [DfE advice 'Health and Safety: DfE Advice on legal duties and powers for local authorities, Head teachers, staff and governing bodies' February 2012](#)) that "Where the local authority is the employer (including Community, voluntary controlled, community special schools and maintained nursery schools) it may give a direction concerning the health and safety of persons (including pupils) on the school's premises or taking part in any school activities elsewhere. Under section 29(5) of the Education Act 2002, governing bodies of such schools must comply with any such direction from the local authority".

The Legal Framework

- A.5 **The Health and Safety at Work etc Act 1974** requires employers to do all that is reasonably practicable to ensure health, safety and welfare at work of employees and non-employees who are affected by their undertaking. This includes off-site activities. Under the 1974 Act, The Management of Health and Safety at Work Regulations 1999 require that employers:
- Produce a health and safety policy linked to risk assessment
 - Have in place systems for reporting accidents and incidents
 - Produce and implement risk assessments
 - Develop measures to control those risks including training and the provision of information
 - Appoint people competent to carry out specific tasks
 - Develop emergency procedures
 - Monitor and review procedures and practice.
- A.6 The [DfE advice 'Health and Safety: DfE Advice on legal duties and powers for local authorities, Head Teachers, staff and governing bodies' February 2012](#), states that:
- For community schools, community special schools, voluntary controlled schools, maintained nursery schools, pupil referral units, youth groups etc. the employer is The Council. These establishments MUST adhere to the requirements contained in this document.
 - For foundation schools, foundation special schools, voluntary aided schools, academies, free schools and independent schools, the employer is usually the governing body or proprietor.

Those establishments that enter into a specific 'health and safety' Service Level Agreement (SLA) with The Council are welcome to use this guidance, but are not obliged to do so. If not using the guidance, they should ensure that the systems in place are equally as robust.

- A.7 **The Management of Health and Safety at Work Regulations 1999** places a duty on the organiser to carry out a suitable and sufficient *risk assessment* of the various activities undertaken, and to ensure that if other persons (e.g. instructors) take charge of activities, then those persons should provide a suitable and sufficient *risk assessment* for those activities.
- A.8 Common law expects people acting "in loco parentis" to take the same care as would a reasonable and careful parent. This duty applies to all educational visits and off-site activities and cannot be delegated. The principle applies to all young people in school and youth group settings.
- A.9 In addition, there is a higher duty of care on teachers and other professional staff as a consequence of greater knowledge they are assumed to have of children and of specialised activities. The level of judgement expected of staff is related to that individuals knowledge, experience and training.
- A.10 In the event of an accident and any Health & Safety Executive (HSE) intervention documentation will be assessed as evidence to establish if the organisation did or did not take reasonable care. If the conclusion is that the organisation did not take reasonable care, the group leader, head teacher and/or The Council could be prosecuted. A key part of any investigation would be whether the employer's health and safety policy and procedures are adequate and had been followed by its employees.

B Roles and Responsibilities

- B.1 Extensive guidance on roles and responsibilities on educational visits can be found in the [OEAP National Guidance](#). The following is a summary of the main features relating to the roles with key health and safety responsibilities.

The Council (CAS)

- B.2 The Council's Health & Safety Team will:

- Make this document available to all Council schools, CAS service areas and schools with SLA agreements via 'Evolve'. The Council will provide training, support and advice related to the management of visits.
- Give approval (or refuse approval) for proposed educational visits where the final approval has not been delegated to head teachers/service managers.
- Operate a clear procedure for action in the event of an emergency.
- Establish procedures to monitor and review safety on visits.

School Governing Body

- B.3 Governing Bodies will ensure that:
- Where The Council is the employer the school adheres to the requirements contained in this guidance document.
 - Where the governing body is the employer it must ensure that the CAS guidance is formally adopted or a policy at least as robust is developed that meets the requirements detailed in the DFE advice, and with significant and clear reference to the OEAP National Guidance.
 - All governing bodies should have a clear policy regarding where approval from governors is required and where approval has been delegated to the head teacher.

Head Teachers / Service Managers

- B.4 The head teachers and service managers will:

- Ensure the CAS policy and school policy are adhered to at all times,
- Ensure that staff leading and accompanying visits have the required training, competence and experience.

Educational Visits Coordinators (EVC)

- B.5 All schools and CAS services should nominate an Educational Visits Coordinator (EVC). This is not a legal requirement, but is strongly recommended as 'good practice'.

- The EVC will be appointed by, and will act on behalf of, the head teacher/service manager.
- The EVC should be specifically competent, often having practical experience in leading and managing a range of visits similar to those typically run by the establishment. Commonly, but not exclusively, such competence will be identified in a person on the senior management team of the school/service.
- The EVC will be the principal contact with the Health & Safety Team over visits planned by the school/service.
- The EVC will be involved in the planning and management of visits including adventurous activities led by the staff of the school/service.
- EVC training and refresher training will be made available to all EVCs.
- The EVC should ensure that DFE advice, this CAS guidance, the schools/services own policy, and/or any other relevant documentation is readily available for access by staff including the OEAP National Guidance as a key planning tool.
- The EVC is required to keep appropriate records of visits, and make these available to the Council Health & Safety Team where requested, as part of our statutory monitoring role where The Council is the employer. The key tool for such record keeping is 'Evolve'.
- The EVC should seek advice from the Council's Health & Safety Team, Physical Education Advisor, Outdoor Learning Adviser or other personnel, where necessary.

The Group Leader

B.6 The group leader has overall responsibility for the supervision, conduct and safety of young people on the visit. They will:

- Gain approval from the EVC and head teacher/service manager as required,
- Inform parents in advance of the nature of the visit and gain their consent and details of medical requirements,
- Undertake a risk assessment identifying the main risks and how these will be controlled. Where necessary this will require a pre-visit,
- Continually risk assess during the visit and encourage young people to take an active role in this process.

C Approval of Visits

C.1 All CAS staff and schools/settings undertaking educational visits **must** follow the system of approval outlined in this policy except where specifically agreed with CAS.

- All visits requiring Council Health & Safety Team approval must be recorded on EVOLVE. CAS strongly recommend that other visits where there may be additional risks (e.g. long distance travel, water margin hazards, extended time away from school/setting) are also recorded on Evolve, as this will provide good evidence of planning and approval.
- Where schools/services choose not to enter visits on Evolve, they must ensure that records are kept in another format and maintained at the school/setting.
- Details of all educational visits that require Council Health & Safety Team approval must be submitted **AT LEAST 3 WEEKS (21 days) BEFORE THE VISIT.**
- **Failure by staff to follow the health and safety policy and procedures of an employer is a breach of the Health & Safety at Work Act etc 1974 and a criminal offence.** Following a serious incident or tragedy a civil case for negligence against an employee is likely to use failure to follow an employers' policy and guidelines as evidence of a breach of the duty of care towards the injured party.
- For Duke of Edinburgh's Award (DofE) expeditions in wild country when young people are remotely supervised there is an additional system of approval, coordinated by the DofE Awards Officer. A copy of the Wild Country Notification (Green Form) must be submitted to the relevant Wild Country Network Co-ordinator and a copy of the form sent either to the DofE Awards Officer or included with the EVOLVE submission six weeks prior to the start of the expedition (see section P).

C.2 All visits should be approved by the EVC. The EVC will obtain approval from the head teacher/CAS service manager. It may be required (on an individual school basis) to ensure that the school governing body are made aware of visits taking place.

The Council Health & Safety Team expect the EVC, head teacher/service manager and

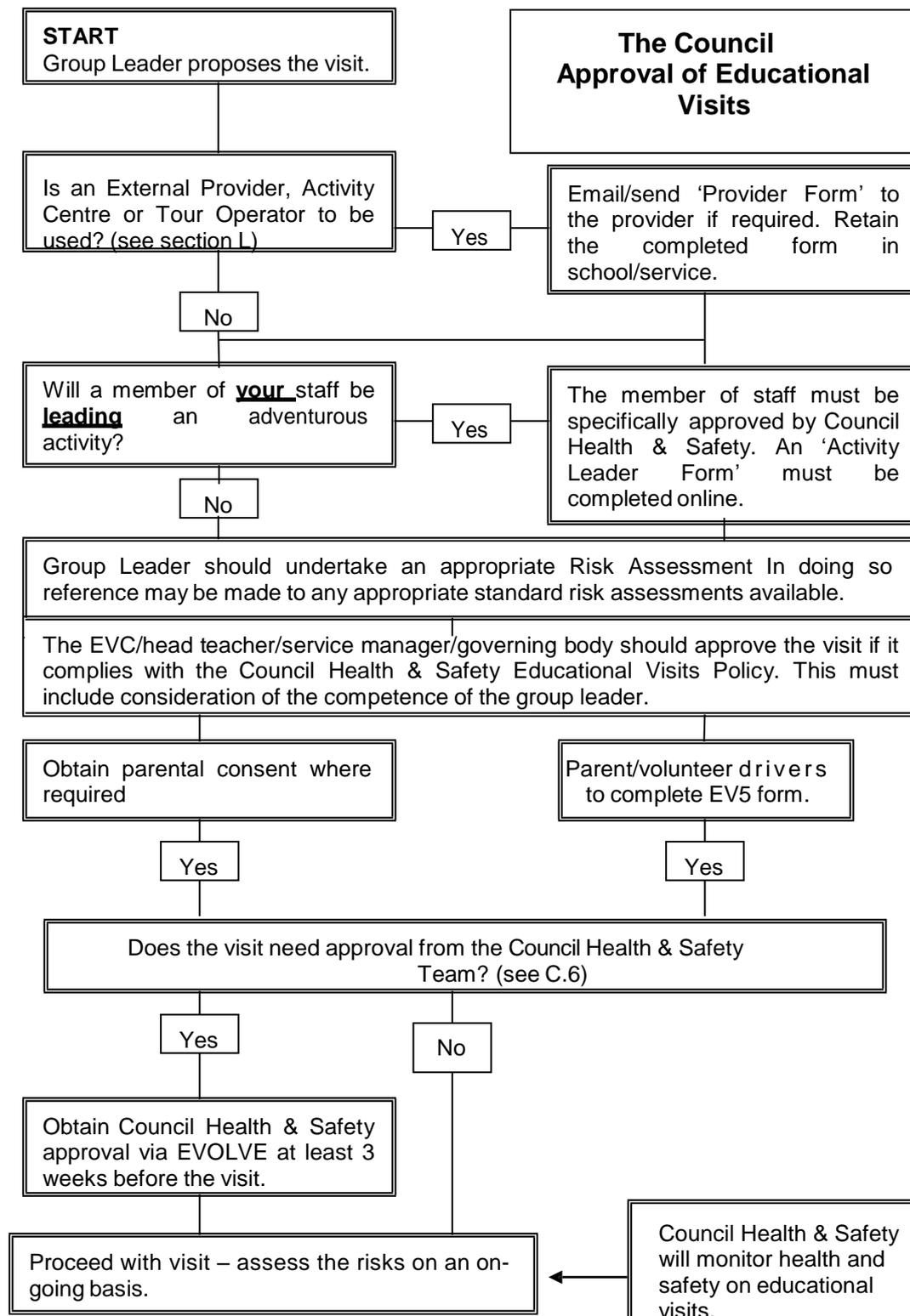
governing body (where applicable) to exercise appropriate professional judgement when approving visits, and expect advice to be sought from ourselves where necessary.

C.3 CAS delegates all aspects of the approval to the head teacher or service manager for all visits not listed in C6 as requiring Council Health & Safety Team approval.

This delegation is conditional upon compliance with this policy.

C.4 The EVC must keep a record of these visits, details of which may be requested by the Council Health & Safety Team as part of our statutory supporting and monitoring role.

C.5 The process to be followed for all visits is detailed in the following diagram.



Schools/settings where the Council is not the employer, but who have been given access to Evolve may use the system to request approval for visits. The use of Evolve, and the value which the school/setting places on the approval by The Council (or otherwise) should be clearly included in the school/settings own health and safety policy.

C.6 Specific approval from the Council Health & Safety Team is required for the following activities:

- Residential visits
- Overseas visits (including expeditions)
- Adventurous activities (see definition below)
- Duke of Edinburgh's Award expeditions
- World Challenge expeditions
- Ski trips
- Other visits where the level of risk is similar to the visits listed above.

There are a number of venues that have been assigned delegated approval to the head teacher/service manager by the Council. Please see the guidance notes on Evolve for a current list.

C.7 Definition of Adventurous

The following activities are regarded as 'adventurous' and require Council Health & Safety Team approval (please note that this list is not exhaustive):

- All activities in 'open country' – any activity (hill walking, mountaineering, fieldwork, biking etc.) on moorland (open uncultivated land) at any height or mountainous ground over 600 metres above sea level **or** at any height where it would take 30 minutes to reach an accessible road or refuge.
Please contact the Council's H&S Team if you are unsure if this definition applies. This can often be an arbitrary boundary which can be difficult to define.
- Swimming (all forms except publicly life guarded pools)
- Camping (including Duke of Edinburgh's Award Expeditions)
- Canoeing / kayaking / rafting / improvised rafting
- Sailing / windsurfing / kite surfing
- Use of powered safety / rescue craft
- All other forms of boating (except commercial transport)
- Water skiing
- Snorkel and aqualung activities
- Rock climbing(outdoor) and related mountaineering activities River/gorge walking or scrambling
- Coasteering/coastal scrambling/sea level traversing
- Underground exploration
- Off-site mountain biking and lowland trail riding
- Road cycling (except as part of a 'Bikeability', cycling proficiency or similar programme)
- Skiing, snowboarding, and related activities
- Air activities (excluding commercial flights)
- Horse riding
- Quad bikes, off-road buggies
- High level ropes courses
- 'Extreme' sports
- Water based activities
- Adventurous activities with the armed services
- Any other activities involving skills inherent in any of the above or that may contain a similar level of risk to participants or staff.

Approval for the above will only be given online via EVOLVE.

- C.8 The following visits are not regarded as adventurous and therefore do not require Council Health & Safety Team approval. These activities must however be supervised by a member of staff who has previous relevant experience and/or who has been assessed by the EVC or head teacher/ service manager as competent to supervise the activity:
- Walking in parks or non-remote country paths
 - Field studies (unless in the environments defined as adventurous)
 - Swimming in publicly life guarded pools
 - Theme parks (e.g. Alton Towers, Adventure Valley etc.)
 - Tourist attractions
 - Pedal go-carts
 - Motorised go-karts at commercial venues
 - Paint balling and 'Laser Quest' type activities
 - Archery clubs
 - Indoor rock climbing/bouldering provided by a leisure centre or similar commercial venue
 - Ice rink skating
 - Farm visits
 - Local traffic surveys
 - Museums, libraries etc.
 - Physical education and sports fixtures
 - Dry ski slope activities
 - Water margin activities – such as walking along a riverbank or stream, collecting samples from streams & ponds, or paddling in gentle shallow (up to the knees) water. If the activity exceeds this definition the activity is water based and therefore adventurous.

Note staff involved in water margin activities should be conversant with the guidance contained in the [DfES publication 'Group Safety at the Water Margin'](#). Though published in 2005, this still provides an excellent source of advice.

CAS Service Areas

- C.9 This policy applies to all non-school areas of CAS that undertake activities similar in nature to educational visits.
- C.10 Each service will be required to identify suitably competent and qualified staff to undertake the role of the EVC and identify the Service Manager that will approve educational visits on behalf of the service. This person will usually be a senior member of staff within the service.
- C.11 Where the policy requires the approval of the Council Health & Safety Team this will be achieved using the EVOLVE system. Where required, especially for adventurous activities, the Council Health & Safety Team will seek further advice from technical advisors or other experts.
- C.12 It is recognised that some parts of CAS have high levels of competence in leading visits and this will be reflected in each services approval system and in some cases the level of delegation to services will be increased (via the EVOLVE system) to reflect this additional competence.

D Competence to lead

- D.1 The single most important factor in ensuring the safety of participants involved in an educational visit or activity is the competence of the group leader.
- D.2 The EVC and head teacher/service manager should therefore consider the following when assessing the competence of a member of staff to lead a visit:
- What is the leader's reason for undertaking the visit?
 - Is the leader an employee?
 - Has the leader a real sense of responsibility, extending beyond the teaching of the subject to concern for the participants well-being?
 - Does the leader possess the necessary organising ability?
 - Is the leader competent in risk assessment and risk management?
 - What experience has the leader of the participants he/she intends to lead?
 - What experience has the leader in leading, or assisting in the leading of similar visits or activities?
 - What experience has the leader of the environment and geographical area chosen?
 - Does the leader possess appropriate qualifications?
 - If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
 - If leading adventurous activities has the leader been approved by the Council Health &

- Safety Team?
 - Is the leader aware of, and able to comply with, all relevant guidelines?
- D.3 The establishment should contact the Council Health & Safety Team if there is doubt regarding the competence of a member of staff to lead an educational visit. CAS has access to independent technical experts to assist in making decisions on competence to lead, especially for adventurous activities.
- D.4 A Matrix of recommended staff competency/qualification is available on Evolve.

Adventurous Activities for Which There Are No Specific National Qualifications.

- D.5 In the absence of formal, recognised qualifications for some adventurous activities, it is good practice for group leaders to hold qualifications in closely-related activities. The level of the qualification required needs to be matched to the levels of hazard and risk. Group leaders wishing to lead such activities must seek full approval from their EVC and head teacher/service manager, and the Council Health & Safety Team.

E Supervision & Staffing Ratios

- E.1 Young people on visits must be adequately supported and supervised at all times.
- E.2 The level of supervision should be based on **risk assessment** for the specific visits, and will be determined by such factors as:
 - The type, risk and duration of activity
 - The nature and requirements of individuals within the group, including consideration of special and additional needs
 - The experience and competence of staff and other adults
 - The venue, time of year and prevailing/predicted environmental conditions
 - The contingency or plan B options.
- E.3 We expect the group leader, EVC and head teacher/service manager to make a professional judgement regarding the appropriate level and suitability of staffing for every visit. A visit must not go ahead where any of the above persons are not satisfied that an appropriate level of supervision exists.
- E.4 The following ratios are therefore **only a guide** and do not overrule or replace the professional judgement of the group leader, EVC and head teacher/service manager.

Lower Risk Activities (where the risk is similar to everyday life)

- Nursery and Foundation Stage pupils - 1 adult to every 4 - 6 pupils
- Key Stage 1 pupils - 1 adult to every 4 - 6 pupils
- Key Stage 2 pupils - 1 adult to every 10 - 15 pupils
- Key Stage 3, 4 & 5 pupils - 1 adult to every 15 - 20 pupils

Higher risk / Adventurous / Residential Visits

- Key Stage 1 pupils - 1 adult to every 2 pupils
- Key Stage 2 pupils - 1 adult to every 6 - 10 pupils
- Key Stage 3,4 & 5 pupils - 1 adult to every 10 - 15 pupils

Remember - The group leader is responsible for the group at all times.

- E.5 It is good practice for each supervisory adult to:
 - Have a clear plan of the activity to be undertaken and its educational objectives.

- Have a reasonable knowledge of the young people involved, including any **special educational needs, medical needs or disabilities**.
- Possess prior knowledge of the venue.
- Carry a list/register of all group members (including emergency contact numbers) and know who they are responsible for.
- Regularly check the group (head count etc).
- Have the means to contact the group leader if help is required.
- Continually monitor the appropriateness of the activity, the physical and mental condition and abilities of the group and the suitability of the prevailing weather conditions etc.
- Clearly understand the emergency procedures and have access to a first aid kit.
- Group leaders should provide a full briefing to accompanying adults prior to the visit.

Down Time

- E.6 Group leaders should ensure that children and young people continue to be properly supervised during “down time” – before, between and after activities, including lunch periods and the evenings on residential visits etc.

Remote Supervision

- E.7 If the aim of visits for young people is to encourage independence and investigative skills, some of the time on visits may be supervised from a distance. The group leader must establish during the planning stage whether young people are competent in remote supervision and must ensure parents have agreed to this part of the visit. The group leader must ensure:
- Children and young people are made aware of ground rules and are adequately equipped to be on their own or in a small group.
 - Children and young people have telephone numbers or other suitable means of contacting the group leader if lost, either by mobile or identified local telephones.
 - They have maps, plans and other suitable information for them to act effectively and know how to summon help.
 - In enclosed areas, such as theme parks, children and young people know where and when to meet supervising adults, at key locations at set times.

Remote Supervision during Adventurous Activities

- E.8 The training given to young people must be sound and thorough. The instructor should have appropriate qualifications and experience to provide clear guidance for each activity. The group leader should be satisfied that young people have acquired the necessary skills and have the necessary experience, confidence, physical ability and judgement to be left without direct supervision. Guidance in this document must be followed for all Duke of Edinburgh’s Award Expeditions.

NB For all educational visits and off-site activities the group leader remains fully responsible for all children and young people, even when not in direct contact with them.

Teachers and other employees’ children accompanying visits

- E.9 It is acknowledged that some employees and volunteers could not help in educational visits unless their own children accompany them. However, group leaders and helpers who bring additional children will have potential conflicts of responsibility, which could have consequences for supervision levels and group safety. It is therefore essential that EVC’s/head teachers/service managers consider the implications of such requests and those arrangements do not compromise the safety of other group members. Where agreements are made to allow staff to bring their own children on a visit, this arrangement should be communicated to the parents of the other young people and identified within the risk assessment.

F Information for Parents, Guardians and Carers

F.1 Written consent from parents is not required for pupils to take part in the majority of off-site activities organised by a school (with the exception of nursery age children) as most of these activities take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required.

F.2 Written consent is only requested for activities that need a higher level of risk management or those that take place outside school hours. A "one-off" consent form can be signed by parents when a child enrolls at a school. This will cover a child's participation in any of these types of activities throughout their time at the school. This includes adventure activities, off-site sporting fixtures outside the school day, residential visits and all off-site activities for nursery schools which take place at any time (including during school holidays or at the weekend).

Again, parents should be told where their child will be at all times and of any extra safety measures required.

F.3 We strongly recommend that schools/settings seek consent separately for a particular visit, especially for residential visits and adventurous activities. The original EV4 consent form for a specific visit is available on EVOLVE.

F.4 Information to parents should include:

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 telephone number, including 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 the value of a 'telephone tree' to make easy and rapid contact with a large group of parents, e.g. regarding changed transport arrangements.
7. Names of group leader and accompanying staff.
8. Names and status (e.g. parent) of other accompanying adults who will exercise some responsibility during the visit.
9. Details of activities planned. Any activity involving special hazards must be clearly specified.
10. Charges or voluntary contributions; what they cover and do not cover.
11. Methods of payment and cancellation arrangements.
12. Insurance effected for the group members in respect of baggage, personal accident, cancellation and medical cover. Send a photocopy of the insurance schedule to all parents or state that a copy of schedule may be obtained from the group leader.
13. Clothing/footwear and other items to be taken. Prohibited items.
14. Money to be taken.
15. Code of conduct; details relating to the standard of behaviour expected from the group during the visit; including for example, rules on general group discipline, smoking, sexual behaviour, illegal substances and alcoholic drinks.
16. Parents should have sufficient information to give informed consent and give written consent for emergency medical treatment.

- F.5 Group leaders should appreciate the benefits of inviting parents to a planning meeting, particularly where a residential experience is involved, visits abroad or where the activity constitutes a 'new direction' for the group members or the establishment. There is then the opportunity for all involved to be fully informed and to raise issues which may be difficult to put down in writing.

G Child Protection / DBS

- G.1 All employees and volunteers over the age of 16 involved in educational visits with young people will require Disclosure Barring Service (DBS) clearance where:
- Planned contact with the pupils/students will take place once a week or more.
 - Planned contact takes place on 4 or more occasions in a 30 day period.
 - Planned contact takes place overnight between 2.00am and 6.00am.
 - DBS checks must be renewed every 5 years.
- G.2 Occasional volunteers who are known to the school/setting, and who will not work with the pupils 'frequently, intensively or overnight' (as above) can accompany visits without DBS clearance. In this case those volunteers should not be allowed unsupervised contact with the children.

Copies of Disclosure Application Forms provided by the DBS and associated advice for applicants may be obtained from the Disclosure Barring Service, County Hall, Durham, DH1 5UL, Telephone 03000 268419.

H Equalities Act 2010 and Medical Needs

- H.1 Following an amendment to the Equalities Act by the Special Educational Need Act 2001, it is unlawful for any establishment to discriminate against disabled participants (current and respective) because of their disability, without justification – which must be both material and substantial to the particular case. You are required to make reasonable adjustments to avoid disabled participants being placed at a substantial disadvantage. However, the Equalities Act does not require responsible bodies to place employees or participants at risk in order to make reasonable adjustments. In all cases compliance with the Equalities Act must not be achieved by breaching the Health & Safety at Work Act etc 1974 i.e. reasonable adjustments must not place employees or others at unacceptable risk of injury or ill-health.
- H.2 Group leaders and other adults should be aware of all the children and young people's medical needs and any medical emergency procedures. If required, a member of staff should be trained in administering medication and to take responsibility in a medical emergency. If the young person's safety cannot be guaranteed, it may be appropriate to ask the parent or carer to accompany a particular young person.
- H.3 Enquiries should be made at an early stage about access and facilities for securing wheelchairs on transport and at residential centres. We have an all-terrain wheelchair for use on educational visits in open countryside and similar environments. Please contact the Outdoor Education & Environment Team on 03000 260535 for more information.
- H.4 The group leader should also assess whether client manual handling skills will be needed, and if so, whether training should be sought. Group leaders concerned about whether they can provide for a pupil's safety or the safety of others on a visit because of a medical condition of a pupil can seek further advice from the Council Health and Safety Team.
- H.5 The group leader should check that any additional insurance policy taken out covers staff and pupils with pre-existing medical needs. All medical conditions should be declared to the insurance company regardless of whether they have been specifically requested. Failure to declare a medical condition will often invalidate medical/travel insurance. If you need advice/guidance covering the medical needs of participants please contact Helen Perfect (Equalities & Intervention Manager) on 03000 267754 or email helen.perfect@durham.gov.uk.

I First Aid

- I.1 The group leader should make a professional judgement as to the level of first aid required for a particular visit. This decision could be influenced by factors such as the environment and proximity to emergency services or professional care. However, as a minimum, we recommend that for all visits there should be a responsible adult with a good working knowledge of first aid

appropriate to the environment. In the case of Nursery and Foundation Stage pupils it is mandatory that at least one person in attendance on the visit has a current paediatric first aid certificate.

- I.2 The Emergency First Aid certificate is a basic qualification which may be suitable for routine urban visits; however risk assessment may indicate that a higher level qualification is appropriate in circumstances where it is likely that access by emergency services may be delayed.
- I.3 A First Aid Kit appropriate to the visit should be carried.

Accidents on educational visits

| Accidents to be reported without delay to the Council Health & Safety Team | |
|--|---|
| <p>Employees Type of accident – Death or specified injuries including:</p> <ul style="list-style-type: none"> ▪ Fractures, other than to fingers, thumbs and toes ▪ Amputations ▪ Permanent sight loss or reduction in sight ▪ Crush injury causing damage to the brain or internal organs ▪ Serious burns (including scalding) ▪ Scalping which requires medical treatment ▪ Loss of consciousness caused by head injury or asphyxia ▪ Resuscitation or admittance to hospital 24hrs | <p>Non-employees including –</p> <ul style="list-style-type: none"> ▪ Children and young people ▪ Clients ▪ Volunteers <p>Type of accident – If the person in our care is killed or taken directly to hospital for treatment during the visit regardless of how they were transported to hospital.</p> |
| Report without delay to the Council Health & Safety Team. Tel: 03000 265781 | |

- I.4 Accidents on educational visits are less common than most people think and there has been no evidence that accidents are more common on visits than they are in everyday school life or elsewhere in CAS activities.
- I.5 Both the school and Council Health & Safety Policy and Procedures Manuals already contain procedures regarding the reporting of accidents. These policies continue to apply when the school or CAS group undertakes off-site activities.
- I.6 All accidents should be recorded on a Council Accident/Incident Ill Health Reporting Form (or via the online system upon return to school/office) and a copy forwarded to the Council Health & Safety Team.
- I.7 Should an accident occur that would be reportable to the Health & Safety Executive (see table above), the Council Health & Safety Team should be notified without delay i.e. by telephone (03000 265781), fax (0191 3898160) or email (hsteam@durham.gov.uk).

J Insurance

- J.1 The group leader in conjunction with the EVC/head teacher/service manager must be fully satisfied that adequate insurance cover has been obtained before approving any visit.

Employers' Liability & Public Liability insurance

- J.2 The Council's Employers' Liability and Public Liability insurance applies to the activities when away from the school site, home base or when employees are working in the community. Academy schools will need to check with their insurance provider regarding cover while on school visits.

Personal Accident / Travel Insurance

- J.3 Young people and staff **are not** insured for personal accident benefits while on education premises or during educational visits. Similarly there is no automatic insurance cover for the loss of personal property or belongings.
- J.4 Group leaders may feel it appropriate to arrange this type of insurance cover for young people as well as accompanying staff and adult volunteers.

- J.5 Group leaders and individuals who feel that the cover from Council insurers may be inadequate to meet their needs are advised to obtain, at their own expense, a Personal Accident/ Travel Insurance Policy.
- J.6 Some national governing bodies of sport offer personal accident insurance for groups participating in certain sports.
- J.7 If the educational visit has been arranged via a travel company this cover can often be negotiated at reasonable additional cost as part of the travel package. If so, care should be taken to check the terms and conditions of the insurance and the activities that are covered or excluded.
- J.8 For overseas visits the Council's International Office can arrange Travel Insurance at a reasonable cost. This insurance has 3 levels as detailed below. The group leader should check that all activities are covered.

| International office overseas insurance categories (June 2014) | | |
|--|--|---|
| Non-hazardous | Hazardous | Winter sports |
| Athletics, football, orienteering, paint ball, rowing, rugby, sailing, swimming, tennis, sledging. | Abseiling, American football, caving, go carting, horse riding, ice skating, martial arts, mountaineering, potholing, quad biking, rock climbing, sub aqua activities requiring the use of artificial breathing apparatus, trekking in the Himalayas, white water activities | Means any sport on snow or ice (other than skating) Excludes ski jumping, heli-skiing, bobsleigh, ice hockey, off-piste skiing. |

- J.9 Further details on the International Office overseas insurance can be obtained from the International Office Tel: 03000 268502.
- J.10 Further details on general Council insurance policies can be obtained by contacting the Insurance Team on 03000 269666.

K Transport and Travel Arrangements

- K.1 Parents and carers must be aware of the intended form of transport in order to give fully informed consent.

Guidance for Hiring Coaches and Minibuses

Local Journeys

- K.2 The following are a number of simple checks that can be carried out which will assist in deciding whether an operator is suitable to carry out your trip.
1. Ask the transport operator if they currently work for Council on home to school transport. All operators engaged in this work have to regularly provide details of operator's licence and current insurance documentation to the Transport Monitoring Officer. If not ask for copies of both. This will ensure that the operator is licensed and falls within the checks provided by Vehicle and Service Operators Agency, who regulate standards of maintenance and drivers hours compliance.
 2. Ask the operator if the driver of your trip has been checked by our Disclosure Barring Service. All drivers engaged on home to school transport for the Council should have been checked through the Council in house system. An operator engaged on home to school transport will have suitably checked drivers working for them, although this does not mean that you will get one for your trip. If in doubt ask!
 3. Does the operator check the driving licence of their drivers at least annually?
 4. Does the operator have a procedure that will provide a contingency plan should the coach break down during the trip? Ask for details if in doubt.

Long Distance and Continental Journeys by Coach

- K.3 The following are a number of simple checks that can be carried out on long distance and continental journeys.
1. If booking through a tour company, ask who the coach operator will be. Tour companies do not operate their own coaches but use sub- contracted coach operators.
 2. Does the tour company carry out 'Quality Audits' on the coach operator they have booked for your trip? Ask for a copy. If not, then ask a few simple questions.
 3. Obtain a copy of the operator's licence and insurance details. For continental trips, operators must have an international operators' licence – Do they have one?
 4. Does the operator check drivers' licence at least annually?
 5. Will the driver(s) of your tour be Disclosure Barring Service checked?
 6. Does the operator have a procedure that will provide a contingency plan should the coach break down during the trip, particularly on the continent? Ask for details if in doubt.
 7. On a long distance journey, will the driver comply within EEC drivers' hours regulations? For long journeys, operators may use a feeder driver for the first part of the journey. Will the main driver(s) have had the statutory hours of rest before driving the main section of your trip?
 8. On continental journeys, if you are unsure of the capability of the operator ask for some examples of previous trips operated.
- K.4 These simple checks will give you an indication of the standard of the company which you are going to use for your trip. They will also enable you to satisfy yourself as to whether your driver is qualified, insured and will be sufficiently rested before carrying out your journey. Further information on reputable companies can be obtained from the Transport & Contract Services Team on 03000 268530.

School/Centre Mini Buses

- K.5 Council Mini buses can be used by staff if the following conditions are met:
- Mini buses are fully insured under the Council insurance policy or have similar independent insurance cover (fully comprehensive, to include passenger liability with unlimited liability cover in relation to property or death and bodily injury)
 - Mini buses are serviced in accordance with the manufacturer's recommendations or at least every 6000 miles or 6 months whichever is the sooner, and regular safety inspections are carried out.
 - Drivers possess a clean, full driving licence appropriate for the vehicle (category B + D1 – mini buses over 8 passenger seats)
 - Drivers are trained under the Council Minibus Driver's Awareness Scheme (MIDAS) and possess a certificate of competence issued by the MIDAS assessor. This should be renewed every 4 years
 - The vehicle is checked prior to all journeys and details logged in a book carried on the vehicle
 - Schools have a named driver training assessor to provide driver training (including an internal driving test) to new teachers wanting to drive (the driver training assessor should attend a refresher course every 2 years)
 - Drivers are over 21 years of age and have been driving for longer than 2 years
 - Drivers are volunteers and no profit is made
 - Seat belts are fitted to all forward facing seats
 - A first aid box and fire extinguisher are carried on the vehicle
 - A risk assessment is carried out prior to all journeys.
- K.6 Further advice regarding use of mini buses is available from: Chris Prince, Fleet Office, Service Direct, St Johns Road, Meadowfield, Co Durham. Tel 03000 269349.

Parents' and Volunteers' Cars

- K.7 Where parents and/or volunteers cars are to be used to transport children and young people on a visit, form EV5 should be completed and retained by the school/service. This could be done on an annual basis.
- K.8 The risk assessment for the visit should consider the suitability of the supervision arrangements in private vehicles and the need for DBS clearances. The Council Health & Safety Team would also recommend the completion of the Driving at Work risk assessment.

Car seats

- K.9 When using staff or parents' cars, the law regarding car seats will apply:

| | Front seat | Rear seat | Who is responsible |
|---|--------------------------------------|--|--------------------|
| Child up to 3 years* | Correct child restraint must be used | Correct child restraint must be used | Driver |
| Child from 3 rd birthday up to 135cms in height (approx. 4'5") (or 12 th birthday whichever they reach first) | Correct child restraint must be used | Where seat belts are fitted, correct child restraint must be used. An adult belt must be used if the correct child restraint is not available for a short distance for reasons of unexpected necessity or two occupied child restraints prevent the fitment of a third. | Driver |
| Child over 135cms in height (approx. 4'5" in height) or 12 or 13 years | Seat belt must be worn if available | Seat belt must be worn if available | Driver |
| Adult passengers – 14 years and older | Seat belt must be worn if available | Seat belt must be worn if available | Passenger |

* children under 3 years must use the child restraint appropriate for their weight in all cars, vans and other goods vehicles. They cannot travel if a vehicle does not have seat belts installed.

- If no seat belts are fitted in the front, then children under 135cms in height (who are also under 12 years of age) cannot travel in the front.
- "Child restraints" is a collective term in the seat belt wearing legislation for baby seats, child seats, booster seats and booster cushions.

The type of child restraint to be used is determined by the weight of the child.

- Group 0 and Group 0+. These are baby seats – rear facing for child up to 10kg and up to 13kg respectively. (approx. age birth to 9 – 12 months)
- Group I. Child seats – forward facing for children 9kg to 18kg (approx. 9 months to 4 years)
- Group II. Booster seats – for children from 15kg to 25kg (approx. 4 to 6 years), or 15kg to 36kg
- Group III. Booster cushions – for children from 22kg and up to 36kg (from approx. 6 years)

L Use of External Providers

- L.1 Schools and CAS Services will regularly employ other organisations to provide an element of instruction, staffing and guiding on educational visits. In such cases an External Provider Form (EV6) must be completed unless they hold a [LOtC Quality Badge](#). This will include -
- Activity centres
 - Ski companies
 - Educational tour operators

- Overseas expedition providers
- Climbing walls where instruction is provided by climbing wall staff
- Freelance instructors of adventurous activities
- Youth hostels where instruction is provided
- Voluntary organisations e.g. scouts where instruction is provided.

L.2 An External Provider Form (EV6) is **not** required for –

- Establishments/venues which hold a Learning Outside the Classroom (LOtC) Quality Badge
- Youth hostels where accommodation only is used
- Hotel, B&B accommodation etc.
- Camp sites
- Museums, galleries etc.
- Tourist attractions
- Theme parks e.g. Adventure Valley, Alton Towers and similar
- Farms
- Coach train or airplane companies
- Swimming pools
- Climbing walls where instruction is provided by a member of your own staff
- Volunteer instructors of adventurous activities.

L.3 Where an EV6 is required this should be sent to the external provider well in advance of the proposed visit and before any contractual agreement is signed or financial commitment is made.

L.4 The decision to select an external provider is the responsibility of the EVC and head teacher/service manager. Completion of the EV6 does not necessarily signify that the venue meets the needs of your group. A pre-visit and further information, such as references, should also be used to judge a providers suitability. Reference to the LOtC quality badge scheme can be found on the Intranet and Extranet, as well as from www.lotcqualitybadge.org.uk

L.5 If the external provider makes any alterations to the wording of the form or is unwilling to comply, then you must discuss this with the provider and if necessary the Council Health & Safety Team. The form does not need to be forwarded to the Council Health & Safety Team but upload a copy to your Evolve form.

M Risk Assessment

M.1 Risk assessment is nothing more than a careful examination of what could cause real harm and suffering to people, together with an identification of the control measures necessary in order to reduce the risks to a level which, in the professional judgement of the person carrying out the risk assessment, is deemed to be acceptable. The process is applicable to all visits. As with all areas of health and safety you need to adopt a sensible and proportionate approach to the management of risk while planning and undertaking educational visits. For further advice please see the [Health & Safety Executive](#) website.

M.2 There are three 'levels' of risk assessment. These are summarised below, and further guidance on risk assessment is detailed in the [HSE publication '5 Steps to Risk Assessment'](#)

a) Generic and Venue – (normally already in place)

M.3 These will apply to all visits of a particular type as the nature of the visit remains constant and the same general controls will apply each time. Typically schools/services and venues will have generic risk assessments for routine visits to avoid unnecessary repetition when organising visits and to ensure that there is a consistent approach to managing risk.

M.4 The Council Health & Safety Team have produced a series of generic risk assessments. These are available in the Resources section of Evolve.

M.5 When using generic risk assessments the group leader must ensure that the risk assessment is relevant to the proposed visit. The group leader should ensure that the controls in the generic risk assessment are in place and evaluate if this is suitable and sufficient, or if further action is necessary. This should then be signed and dated by the group leader.

b) Event Specific Risk Assessment – (carried out before the visit takes place)

- M.6 This considers any **significant hazards** or risks relating to a visit that are not covered within the Generic Risk Assessment, and should take into account the venue, activities, group, transport, plan B, etc. 'Significant' implies those hazards that could result in serious harm or affect several people. The process should identify the hazards, who might be affected by them, and the measures in place to control the risks.
- M.7 The risk assessment must be recorded (normally by the Group Leader), using the risk assessment form EV2 (or alternative) and approved by the EVC before the visit takes place.

c) On-going – (carried out continuously throughout the visit)

- M.8 The on-going monitoring of all aspects of the visit by the Group Leader and other staff is the single most important aspect of risk management of visits, and hence safety. Risks should be monitored throughout the visit, and where appropriate activities must be modified or curtailed (e.g. Plan B) to suit changed or changing circumstances. **This is the responsibility of all involved in the visit, not just the Visit Leader.**
- M.9 It is not necessary to record on-going risk assessments during the visit, although notes of significant events or decisions can assist the post-visit review following an incident or accident.
- M.10 An activity should only take place/continue if, in the professional judgement of the group leader and/or supervising members of staff, the residual risk following implementation of any control measures is deemed to be acceptable.
- M.11 Relevant aspects of the risk assessment process should be shared with staff and helpers involved in the visit, as well as participants and where appropriate parents.
- M.12 Participants who are involved in a visit's planning and organisation, and who are well prepared, will make more informed decisions and will be less at risk. It is therefore good practice to involve participants in the risk assessment process.

N The 'Learning Outside the Classroom' Quality Badge

- N.1 The Council for Learning Outside the Classroom has developed a badging scheme for provider organisations, which is respected by the DFE and by the OEAP.
- N.2 A Quality Badge will be awarded to a LOtC provider who –
- Has pledged to engage in an on-going process to sustain high quality learning outside the classroom.
 - Has a process in place to assist users in planning the learning experience effectively.
 - Provides accurate information about its offer.
 - Offers activities, experiences and resources which meet learner's needs.
 - Reviews the experience with you and acts on feedback.
 - Manages risk effectively.
- N.3 Further information on the Quality Badge scheme can be found on the educational visits pages of the Intranet and Extranet, as well as from www.lotcqualitybadge.org.uk

O Adventurous Activities

When provided at an outdoor centre or by a contractor

- O.1 The Activity Centres (Young Person's Safety) Act 1995 and the Associated Adventure Activities Licensing Regulations 2004 are in place to ensure the safety of young people involved in adventure in hazardous environments. Schools and youth groups planning to visit an adventure centre or employ a provider in the UK should check with the Adventure Activities Licensing Authority (AALA) on the licence status of the provider to ensure they are licensed to deliver the particular adventurous activities to young people (www.aals.org.uk).

When provided by a schools own staff

- O.2 Single-school groups consisting of children and young people under 18 years of age and over 18's in full time education are exempt from licensing regulations and therefore do not require an AALA licence. However, such groups should still follow the AALA criteria for managing

safety during adventurous activities. Group leaders of single school groups are required to complete an Activity Leader Form (ALF) via the EVOLVE system to gain Council Health & Safety Team approval.

O.3 Groups of young people from different schools, or with other group members under 18 years of age are not exempt from licensing regulations and the school MUST conform with AALA requirements, including holding a licence or working under the Council Licence where one exists.

O.4 The following activities (where undertaken by young people from different schools under 18 years of age and over 18's in full time education in Durham Schools and unaccompanied by a parent), need an Adventure Activities Licence:

Climbing – climbing, sea-level traversing, abseiling or scrambling over natural terrain or certain man-made structures requiring the use of special rock-climbing or ice-climbing equipment or expertise, gorge walking and ghyll scrambling.

Trekking – going on foot, horse, pony, pedal cycle, skis (not piste), skates or sledges over moorland (open uncultivated land) at any height, or on ground over 600 metres above sea level when it would take 30 minutes to reach an accessible road or refuge. Off-piste skiing also requires a licence.

Caving – the exploration of underground passages, disused mines, or natural caves which requires the use of special equipment or expertise.

Watersports – sailing, canoeing, kayaking, rafting and windsurfing, on the sea, tidal waters including estuaries, the tidal reaches of rivers, sea lochs and harbours, inland waters at a location where any part of those waters is more than 50 metres from the nearest land, and turbulent inland waters such as weirs, rapids, waterfalls and fast flowing currents. Rowing is exempt.

O.5 **CAS holds a licence in the climbing, water sports and trekking activity categories for the One Point Service. Schools do not require a licence for their own pupils (see detail above in O.2)**

The specific activities covered are -

- Abseiling - (*Single pitch crags*)
- Hill Walking & Mountaineering
- Improvised Rafting - (*Sheltered inland waters*)
- Kayaking - (*sheltered inland water and rivers up to Grade 2.*)
- Open Canoeing - (*sheltered inland water and rivers up to Grade 2.*)
- Off-Road Cycling
- Rock Climbing - (*Single pitch crags*)

O.6 **ALL AALA LICENSE VISITS REQUIRE APPROVAL VIA THE COUNCIL HEALTH & SAFETY TEAM REGARDLESS OF WHETHER THE GROUP WILL BE LED BY A SCHOOL, SERVICE OR ANOTHER LICENSED ACTIVITY PROVIDER.**

O.7 The armed forces who offer adventure activities are not licensed by the Adventure Activities Licensing Authority. Schools and youth groups planning such a visit should ensure adequate safety standards are observed in all activities and public liability insurance is in place.

Approval for CAS staff to lead an adventurous activity can be gained using the online Activity Leader Form as below:-

PROCEDURE FOR OBTAINING APPROVAL

O.8 Staff who wish to **lead** (i.e. supervise or instruct) an adventurous activity must obtain prior approval from the Council Health & Safety Team before the activity may take place.

O.9 The proposed leader must have their own 'Account' on EVOLVE (obtainable via their EVC). In the 'My Details' section of their account the leader must enter details of any adventure activity awards held, including dates, and upload copies of these awards.

O.10 The EVC (or Group Leader) should request approval for the visit via EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will

request further details regarding the proposed venture (e.g. dates, venues, numbers, etc). The ALF will then be embedded within the approval request for that particular visit.

- O.11 On receipt of an approval request (and embedded ALF), the Council Health & Safety Team will consider the proposed activity relative to the leader's stated competencies and qualifications.
- O.12 Where approval is granted for the member of staff to lead the activity, the visit will be approved by the Council Health & Safety Team via EVOLVE.
- O.13 Where approval is not granted, the approval request will be returned to the EVC with an attached note. Where this is the case the member of staff concerned must not lead the activity.

CRITERIA FOR APPROVAL

- O.14 Approval will normally be granted where the leader of the activity has recent relevant experience, and:
 - is appropriately qualified through the relevant national governing body, *or*
 - has a 'Statement of Competence' from an appropriate 'technical advisor'. For most activities the competence required by a technical adviser is stipulated by the activity's national governing body. For further clarification regarding a technical advisor 'Statement of Competence' please contact the Council Health & Safety Team.
- O.15 In some cases approval may be granted where no qualification is held, but the person concerned is deemed by the Council Health & Safety Team to have a sufficient level of competence in addition to recent relevant experience.
- O.17 In cases where no national governing body exists, we will make a decision based on factors which may include: technical advice, the leader's stated competence, observed competence, past experience, attendance at training courses, etc.
- O.18 Approval will always be subject to a requirement that the leader must operate at all times within the remit of his/her qualifications and competence, and in accordance with national governing body guidelines where these exist. Approval may also be subject to other conditions which will be specified by the Council, specific to the visit.
- O.19 Where there is insufficient information for us to make a decision regarding approval, then the applicant may be asked to provide further information (e.g. evidence of awards, experience, log book details, etc.). In some cases a meeting with the applicant may be requested by the Council Health & Safety Team.
- O.20 The approval granted is solely in respect of a member of staff's authorisation to lead the technical aspects of the specific adventurous activity detailed. It is not an indication in respect of other aspects of the visit such as general management and supervision skills, the assessment of which may be the responsibility of head teacher/service manager and/or EVC.

P The Duke of Edinburgh's Award

- P.1 The Council is the Licensed Organisation for The Duke of Edinburgh's Award. The guidelines in this document must be used when managing expeditions and other activities relating to The Duke of Edinburgh's Award.

Responsibility for Safety

- P.2 The head teacher/service manager is responsible for ensuring that teachers/youth workers are fully qualified and experienced and hold the relevant national governing body qualification for work in the outdoors.
- P.3 The qualified and experienced leader has full responsibility for the safety of the young people whilst out on expedition. Suitably experienced and competent assistant leaders and other adults should work under the direction of the group leader and must be competent in the task they are asked to undertake.

Notification/Approval Procedures for Expeditions

- P.4 All Duke of Edinburgh's Award (DofE) expeditions are regarded as 'adventurous' and require Council approval.
- P.5 In addition, if groups venture into Duke of Edinburgh's Wild Country Areas then the appropriate Network Co-ordinator must be notified in line with the following guidance:
- Ventures that are fully accompanied do not need to notify the Wild Country Network Co-ordinator.
 - Ventures that are unaccompanied for part of the venture or wholly unaccompanied, (practice or qualifying) do need to notify the Wild Country Network Co-ordinator.
 - Notification needs to be received **6 weeks** prior to the venture if assessment is required or **4 weeks** if assessment is not required. Route cards and route tracings must accompany the Green Notification forms.
 - A local pre check of the group is required approximately 2 weeks before qualifying ventures to confirm the competence of the group. The High Pennines and Durham Dales Wild Country Assessor Network will carry this out.
 - A copy of the Green Expedition Notification form (green form) must be sent online through EVOLVE or emailed to the DofE Awards Officer.
- P.6 Those organising expeditions need to be aware of the conditions and guidance in the Duke of Edinburgh's Award Handbook, Programmes File and Expedition Guide. Details of the Wild Country Expedition Areas and Co-ordinators appear on the Duke of Edinburgh website www.dofe.org. Any One Point establishments requiring further DofE advice can contact the DofE Officer on 03000 260515.

Q Residential Visits

- Q.1 All residential visits (apart from those venues with delegated approval status) must be submitted for Health & Safety approval, using EVOLVE, at least 3 weeks before the visit is due to take place.
- Q.2 The 'External Provider Form' must be completed if there is an element of instruction, staffing or guiding as part of the agreement with the accommodation provider, where they do not hold the LOtC Quality Badge (see section L).
- Q.3 Mixed groups should, where possible, be accompanied by at least 1 male and 1 female member of staff. If a responsible adult is used such as a partner, parent or student, the relevant disclosure barring service checks must be obtained. For primary aged children it may be acceptable for female teachers only to accompany mixed groups, provided the EVC, Head Teacher, parents and staff involved are fully satisfied with this arrangement.
- Q.4 If the residential accommodation has not been used before, a preliminary visit is strongly recommended. If this is not practical, for example due to distance, the group leader should make sufficient enquires with the accommodation to be satisfied that it will be suitable for the group involved.
- Q.5 On arrival it is advised that staff check out the accommodation, rooms, campsites etc. and report any damage to the head of centre/manager before pupils access the rooms.
- Q.6 Teachers should be accommodated on every floor where there are children or young people.
- Q.7 In the absence of 24 hour staffing of hotel/hostel reception areas, external doors and windows should be made secure to prevent unauthorised visitors or intruders.
- Q.8 All staff and young people should be aware of the emergency procedures and escape routes in the event of fire.

R Visits Abroad

- R.1 Visits abroad provide valuable and rewarding educational experiences. Such visits require detailed planning and preparation. Group leaders should seek to ensure they use the services of a reputable tour operator experienced in group travel. Air travel organisers may be licensed through ATOL (Air Travel Organisers License) for all or part of a package. This licence is a legal requirement and provides security against a licence holder going out of business. It is recommended that establishments use tour companies which are members of a Department of Trade approved bonding body; such as ABTA (Association of British Travel Agents) or AITO (Association of Independent Tour Operators). Ensure you have ready access to your insurance company telephone number. The Package Travel Regulations 1992 may apply. Where schools

independently provide a package they should ensure they act within the regulations.

R.2 In addition to the Planning Checklist group leaders should:

- Ensure the 'External Provider Form' (EV6) is completed, where required, if there is an element of instruction, staffing or guiding as part of the agreement with the tour operator.
- Identify whether there are medical requirements imposed by the country to be visited.
- Ensure a European Health Insurance Card is obtained for all visits to member countries of the European Union, available online at www.ehic.org.uk or telephone 0191 2181999.
- Ensure the group has comprehensive travel insurance covering all proposed activities.
- Enquire about insurance cover should a parent need to travel out to the resort as a result of an accident/incident involving their child. Some policies provide cover for only 1 parent to travel whilst others will pay for both parents. These details must be shared with parents prior to the departure of the group.
- Ensure all children and young people, teachers and accompanying adults' passports are current and suitable to enter the destination country.
- Know the international dialling code in the event of a serious accident or the emergency contact needs to be informed.
- Make regular contact with the school throughout the visit to keep contacts informed of significant events.
- Identify an emergency contact at home/back at base who holds a valid passport and could travel out to the area to support the group leader in the event of an emergency.
- Brief children and young people about any local hazards and emergency procedures, including the use of telephones.
- Risk assess all activities planned for the visit, particularly hotel swimming pools and all adventurous activities.
- Discuss any local customs and cultural issues.
- Agree codes of conduct with children and young people.
- Check visa and passport requirements including those children and young people classed as non-UK residents. Ensure all members of the party carry the address and telephone number of the hotel or hostel in case of separation.
- It is good practice for each child or young person to carry a card with a contact telephone number of the group leader or residential base, to call if he/she becomes lost. Children and young people should be instructed to go to a local shop or approach a police official and show the card if he/she becomes separated from the group.
- Consider language ability as part of their risk assessment.
- Photocopies of passports and other essential documentation may prove useful. Copies should also be held by the emergency contacts in the UK.
- Seek advice from the Foreign and Commonwealth Travel Advice Unit or the Suzy Lamplugh Trust for visits to Third World or sensitive countries. (See Appendix - contacts and publications).

R.3 Visit the Foreign & Commonwealth Office website for the latest travel advice – www.fco.gov.uk.

R.4 Approval should be sought from the Council Health & Safety Team via EVOLVE at least 3 weeks in advance or at the planning stage, whichever is the earlier. Group leaders are encouraged to have a 'plan B', making alternative arrangements so they are prepared should the need arise to change the itinerary due to unforeseen circumstances.

R.5 In normal circumstances each party should be accompanied by two adults, at least one of whom should be a member of staff. Further advice can be provided by the Council Health & Safety Team on 03000 265781.

S Snow

- S.1 Snow sports (skiing and snowboarding) are regarded as adventurous activities, and the visit must therefore be approved by the Council Health & Safety Team.
- S.2 Group leaders are particularly encouraged to consider the benefits of snow sports visits taking place during term time as opposed to during the holiday periods. These benefits include: greater choice generally, less queuing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snow sport establishment instructors (as opposed to 'casual' instructors), greater likelihood of English speaking instructors, considerable cost savings through avoiding high season (possibly allowing more young people to participate), etc.
- S.3 A member of staff intending to organise a snow sport visit (but not instruct, lead or supervise on snow) is strongly recommended to hold the Ski Course Organiser Award (SCO), administered by Snowsport England. Tel. 01509 232323 www.snowsportengland.org.uk/ and must have previously accompanied at least one educational snow sports visit.
- S.4 Young people may only ski or snowboard when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snow sports establishment. Visit organisers should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.
- S.5 Where a travel company or ski tour operator is providing an element of instruction, staffing or guiding, the 'External Provider' (EV6) form should be completed.
- S.6 A member of staff intending to lead skiing or snowboarding (i.e. not using a ski school instructor) must:

- a) be qualified as below, *and*
- b) have been approved by the Council Health & Safety Team, *and*
- c) operate at all times within the remit of their qualifications and competence.

Skiing: The minimum qualification to lead skiing on snow is:

- The Alpine Ski Course Leader Award (ASCL) of Snowsport England
Tel. 01509 232323 www.snowsportengland.org.uk/or
- The Alpine Ski Leader Award (ASL) of Snowsport
Scotland Tel. 0131 6254405
www.snowsportscotland.org/or
- A statement of competence by an appropriate 'technical adviser'.

Snowboarding: The minimum qualification to lead snowboarding on snow is:

- The Snowboard Leader Award (SBL) administered by Snowsport Scotland
Tel. 0131 6254405 www.snowsportscotland.org/or
- A statement of competence by an appropriate 'technical adviser' (see Z.7).

- S.7 An increasing number of resorts and ski schools make the wearing of a properly fitted ski helmet mandatory for young people. In some countries this is a legal requirement and in most it is strongly recommended that all students wear helmets for skiing and snowboarding.

Suitable helmets must be worn by participants at all times when:

- a) aged under 8 *or*
- b) racing *or*
- c) aged under 14 in Italy
- d) when required by an individual resort or local/national legislation in the country being visited.

- S.8 Young people must not participate in off-piste activities.

T Overseas Expeditions

- T.1 Overseas expeditions can potentially bring immense educational benefits to children and young people, and CAS fully supports and encourages overseas expeditions that are correctly planned, managed, and conducted.

- T.2 Overseas Expeditions (for the purposes of this document) are defined as those which typically take place in remote areas of the world and/or in developing countries.
- T.3 The Council places stringent requirements on Overseas Expedition providers, and establishments may therefore need to allow up to 12 months for Council Health & Safety Team approval to be granted.
- T.4 External providers should complete the 'External Provider' (EV6) form if they are supplying an element of instruction, staffing or guidance.
- T.5 Further guidance is contained within 'Guidance for Overseas Expeditions, Edition 3' (download via the National Library on EVOLVE). This should be referred to when the proposal is initiated (normally 18-24 months before the venture). This document includes a checklist of vital aspects that **must** be considered prior to the establishment making a commitment with an external provider. In particular, establishments should consider the educational aims of the visit, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met. Overseas expedition providers are required to comply with the minimum standards specified in this document.
- T.6 The Council Health & Safety Team strongly recommend that the group leader attends the one day 'Overseas Expeditions and Fieldwork: a Course for Teachers and Youth Leaders' course organised by the Royal Geographical Society and endorsed by the national Outdoor Education Advisers' Panel.
- T.7 Further details are available at: www.rgs.org/eac or contact Council Health & Safety.

U Exchange Visits

- U.1 The success of a foreign exchange is largely dependent on good relationships, planning and communication with staff in the host school. In particular group leaders should ensure:
- All group members have easy and accessible contact in the host country, preferably by telephone with a member of their own staff.
 - Children and young people are aware of the ground rules agreed between the party leader and the host family.
 - Appropriate pairing arrangements are made.
 - Host families are aware of any medical or dietary needs.
 - There are clear arrangements for collecting and returning children and young people.
 - The school retains a list of all children and young people involved (including host children) and their family names and addresses.
 - Children and young people living with host families should have easy access by telephone to their teachers.
 - Children and young people are briefed regarding emergency arrangements and encourage contact with their staff in the case of anxiety or concern.
 - Where foreign exchanges are organised by a UK school, and are of less than 28 days, or where private arrangements are made directly between parents (for any length of time), the requirement for DBS checks are lifted: the host parents (UK or abroad) would not need to be DBS checked. However, the staff that take the children and are responsible for their supervision on the trip would need to be DBS checked.
- U.2 Host families will not be subject to UK law. Group leaders should seek reassurances from the host school regarding procedures for vetting the suitability of host families. The host school or placing agency should have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange children and young people. If these are not in place the group leader should seek further assurances and/or reconsider whether the visit should take place.

V Water Margin Activities

- V.1 Further information can be found in the publication “Group Safety at Water Margins”. (DCSF, archived on DFE website.)
- V.2 Water margin activities are defined as learning activities that take place near or in water – such as a walk along a riverbank or sea shore, collecting from ponds and streams, or paddling/walking in gentle, shallow water. It does not apply to swimming and other activities that require water safety qualifications and equipment, or water-going craft. Note that ‘shallow’ generally means up to the knees.
- V.3 As with all activities the group leader’s judgment will be paramount. The activity or journey should be matched to the party in terms of aims, terrain, distance, equipment available, clothing worn, weather conditions (both current and forecast), degree of supervision and time available.
- V.4 Water margin activities are not classed as adventurous and so do not require specific approval from the Council Health & Safety Team.
- V.5 Water margin activities should be approved by the head teacher/service manager and recorded on EVOLVE.
- V.6 If the planned activity exceeds the above definition, the visit is ‘water based’ and will therefore require approval from the Council Health & Safety Team.
- V.7 The Royal Life Saving Society (RLSS) has developed a ‘Water Safety Management Programme’ to help leaders gain confidence in managing risk and reacting to emergencies on the water margin. Contact: www.rlss.org.uk

W Water Based Activities

- W.1 ‘Water based’ activities are regarded as adventurous and therefore require approval from the Council Health & Safety Team via the EVOLVE system.
- W.2 The responsibility for safety will therefore rest with either:
- a) **An external provider** – in which case the ‘External Provider Form’ should be completed, or
 - b) **A member of school/service staff** – in which case the ‘Activity Leader Form’ must be completed via EVOLVE and the persons qualifications approved by the Council Health & Safety Team.
- W.3 In order to participate in ‘water based’ activities, participants should normally be water confident. Participants who lack water confidence may still be able to take part subject to risk assessment, and taking into account factors such as the activity taking place, staff competence and supervision arrangements. Reference to national guidelines may help in this process. The level of water confidence of all participants must be known by the activity leader prior to the commencement of ‘water based’ activities.
- W.4 Leaders should have a knowledge of the water conditions/hazards (and potential changes) that might be encountered, and prepare accordingly. Local advice must be sought where appropriate in unfamiliar locations.
- W.5 Personal buoyancy conforming to the appropriate national governing body standard must be worn at all times by all participants in water based activities (except at the discretion of the leader in swimming activities).

X Beach Safety

- X.1 The beaches and coastal areas of Durham and elsewhere offer a wide range of opportunities for both study based and activity based use. However, whilst presenting many challenges and interest, areas where the land meets the sea present their own inherent hazards. A high level of vigilance and supervision is needed when close to any stretch of water, even shallow water. The sea needs extra care and attention. Group leaders planning activities in coastal areas should consider the following points:
- Tides, swell, wind, currents, sandbanks and cliffs can present difficulties. Exit routes must

be checked well in advance and at all times during the visit or activity.

- The group leader should be aware of the prevailing local conditions: surf and tide, currents, wind, cold water, weeds, polluted water and stability of the sea or river bed may all affect safety. Gain access to local information where possible.
- Swimming is inadvisable no matter how inviting the sea may seem and should never be allowed as an impromptu activity. Group leaders who decide to allow swimming should ensure this is part of a carefully supervised activity conducted by suitably qualified leaders, with adequate lifeguard provision and experienced adults in the group who are qualified to enter the water to rescue a swimmer in difficulty. The group leader must be fully confident of undertaking a rescue of any member of the group and remain in control of the whole group, including those in and out of the water. See section Y for further information on swimming qualifications.
- Paddling in very shallow water needs to be strictly supervised, especially on coasts with sudden drops, submerged rocks, sandbanks or large waves. Again, the group leader must be able to remain in full control of all pupils, including those in and out of the water.
- Risk assessments for outdoor water-based activities should take account of the possibility of children who suddenly panic in cold water.
- Beaches present their own problems, particularly when large numbers of the general public are present. Establish a 'base' to which 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, jelly fish, barbed wire or marker flares.
- 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.
- Weed covered rocks may make surfaces very slippery.
- Children, young people and staff on beach related visits should be made aware of the risk of sunburn and heat stroke. This should be considered as part of the risk assessment.
- On cliff tops remain on the path. The group leader should be at the front and a responsible adult at the back. Accompanying adults should act as a 'buffer zone' between pupils and the edge of the cliff. Cliff tops are exposed areas and may experience rapid changes in weather conditions. Clothing, route choice and group management should reflect this on very exposed paths. Be prepared to seek advice from the Coastguard, Lifeguards, the District Council, the Met Office or the Council Health & Safety Team. Only undertake those activities and projects which you have the necessary experience and competence to undertake.

Y Swimming

Y.1 Children and young people must be supervised by a competent adult at all times whilst undertaking swimming activities. The following criteria apply:

Open water swimming

Y.2 Note: Council Health & Safety Team approval is required for this activity.

For free swimming activity

a) a valid National Beach Lifeguard Qualification administered by the Royal Lifesaving Society UK (RLSS) (or equivalent in the country visited) see www.lifesavers.org.uk

For structured or programmed activity

- b) a valid RLSS UK Emergency Response (Activity Supervisor) Award **or**
- c) a written statement of competence by an appropriate technical adviser.

Y.3 In addition, the designated lifeguard must be dedicated exclusively to the group, and the location used must fall within the RLSS definition of a 'safer bathing area'. See the RLSS website for further detail – www.rlss.ork.uk.

Swimming pools (lifeguarded)

- Y.4 Note: Council Health & Safety Team approval is **not** required for this activity.
- Y.5 UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure teaching and coaching activities are conducted safely.
- Y.6 For publicly lifeguarded pools abroad, the group leaders must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
- Y.7 Unless suitably qualified, CAS/School staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.
- Y.8 For swimming lessons, the group leader should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to the guidelines given in the Hotel (and other) swimming pools section below.
- Y.9 Staff leading structured swimming lessons should hold an ASA level 2 Swimming Teaching qualification or higher. The current Council teacher to pupil ratio (as recommended by the ASA) for swimming lessons is 1:20.

Hotel (and other) swimming pools

- Y.10 Note: Council Health & Safety Team approval is required for this activity if lifeguarding arrangements are not provided at the venue.
- Y.11 **If lifeguarding arrangements are not provided at the venue then the group leader will bear the full responsibility for ensuring swimming safety.**
- Y.12 The group leader must ensure that there is a qualified lifeguard or 'competent person' (see below) in attendance. This could be a member of staff, or a senior student.
- Y.13 The role of the lifeguard is to:
- Keep a close watch over the pool and the pool users, exercising appropriate levels of control (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)
 - If necessary, brief pool users in advance regarding 'rules' (e.g. no diving, running, etc.)
 - Communicate effectively with pool users
 - Anticipate problems and prevent accidents
 - Intervene to prevent behaviour which is unsafe
 - Carry out a rescue from the water
 - Give immediate first aid to any casualty
- Y.14 The above must be accomplished in the context of the normal operating procedures for the pool and the emergency plan, which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool, and staff should be aware of the procedures in the event of an emergency, and who at the venue will provide back up for the lifeguard during an emergency.
- Y.15 Staff will also need to ascertain whether they have exclusive use of the pool or whether other persons (e.g. guests) are able to swim at the same time. Other pool users may increase the supervision role of your lifeguard.
- Y.16 If a senior student holds an appropriate qualification then their role should be emergency lifeguard action, and supervision should remain the responsibility of the school/services staff.
- Y.17 The following awards/qualifications apply:

For free swimming activity

- a) A valid National Pool Lifeguard Qualification administered by RLSS UK (or equivalent in the country visited) see www.lifesavers.org.uk

For structured or programmed activity

- b) A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (or equivalent) - see www.lifesavers.org.uk or
- c) A valid RLSS UK Emergency Response (Activity Supervisor) Award or
- d) A written statement of competence by an appropriate technical adviser.

Y.18 Public open water venues (beaches, lakes etc.) with an active lifeguard service

The group leader will bear the full responsibility for ensuring swimming safety.

- Swimming may only take place in designated, marked areas, and with the lifeguard on duty.
- The party leader must ensure that swimmers and non-swimmers are aware of any written or verbal safety advice provided by the on-duty lifeguard or local information boards etc.
- While it is not essential, the Council strongly recommends that the activity leader hold the RLSS UK National Rescue Award for Swimming Teachers and Coaches, or has undertaken the 'Beach' module of the RLSS Water Safety Management Programme.
- The presence of a lifeguard does not reduce the duty of the party leader to manage the swimming activity safely, including regular headcounts and attention to the location/behaviour of the group at all times.

Z Farm Visits

Z.1 Visits to private working farms, agricultural college farms, 'model' farms and rural studies centres are a regular feature of education for children and young people from both rural and urban environments. Such visits are usually highly beneficial to children in helping them to appreciate aspects of rural life. Children and young people are often invited to touch livestock, help bottle-feed calves and lambs, and taste things such as animal feedstuff and raw milk.

The Risks

Z.2 Experience over recent year's shows that visits can carry a small risk for the children and 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. Farm visits may result in a risk of transmitting infection directly because the substance eaten is infected or contaminated. In addition, fingers may become contaminated with animal faeces which is then transferred to their mouths when eating or simply sucking their fingers or thumbs.

Health Precautions

Z.3 Farmers and visit organisers need to be aware that visitors may be more susceptible to infection from the farm environment and its products than those who live in that environment. Therefore prevention depends primarily on simple hygiene measures. Parents, teachers and children should be made aware of these measures and they should be re-emphasised before and during the visit. To this end the following advice is given:

Z.4 *For the Farmer*

- The hazards that farms can pose to personal safety should be stressed to children and young people and teachers on their arrival.
- A high standard of physical and general cleanliness is required in all areas to be visited by children and young people.
- Plenty of fresh bedding should be provided for stock to minimise the risk of contact with dung. Areas should be hosed where appropriate.
- Sick animals –must be isolated well away from visitors.
- Adequate hand washing facilities must be provided for visitors, i.e. soap, running water and disposable hand towels (not roller towels). Toilet facilities should also be available.
- A separate clean area must be set aside for eating purposes if refreshments are taken on site.
- Children and young people must not be encouraged to taste animal feed or raw milk.
- Further advice/ training available from : <http://www.farmsforschools.org.uk>

Z.5 *For Group Leaders/Teachers/Parents/Volunteers*

- Carry out a pre-visit to identify specific hazards.
- Ask children and young people with cuts or abrasions to cover them with a suitable dressing.
- There should be a briefing for children and young people at the farm at which the points in these guidelines should be covered.
- Keep their fingers out of their mouths and do not eat their sandwiches etc, until they have washed their hands.
- Do not sample, taste or take away any animal feed stuff, raw milk etc.
- Do not drink from farm taps.
- Children and young people should be closely supervised if direct contact with animals is likely. If this happens they should be made to wash their hands afterwards.
- Never let children or young people place their faces against the animals.
- Consider the risks of allowing children or young people to ride on tractors or other farm machines.
- Do not let children or young people play in the farm area (grain storage tanks, slurry pits) other than designated play/rest areas.

Other Hazards

Z.6 Modern farms can present hazards to children, young people and adults. Group leaders need to be aware of:

- At harvest time some children and young people with asthma or hay fever may experience difficulty.
- The dangers of moving machinery and mechanised tools such as chain saws etc.
- Some farms hold stocks of highly toxic chemicals, used in spraying etc. contact with which presents a clear hazard.
- The possible risk of diseases being transmitted to pregnant women during lambing time.

Z.7 Although the above guidelines have been written with farms in mind, the general principles should be followed when visiting other similar establishments (zoos, wildlife reserves, etc).

A2 Emergency Procedures

All schools and services should consider the need for robust emergency arrangements as part of visit planning and risk assessment process.

All staff involved in a visit should be aware of the action to be taken in the event of an emergency.

It is vital that **all staff** understand the first aid and emergency procedures, not just the visit leader. Particular consideration should be given to participants that have special educational needs or medical conditions.

For all visits:

A completed: **'Emergency Card – Group Leader' (EV7)** form must be with the Group Leader at all times.

Where the emergency contacts will not be at their workplace during the visit–

A completed **'Emergency Card – Emergency Contacts' (EV8)** form must be with the Emergency Contact(s) at all times.

CAS uses the Civil Contingencies Unit (CCU) for out-of-office-hours emergency support for serious incidents where the scale/seriousness of the event may be beyond the capacity of the visit leader and school/ service emergency contacts.

B2 'Adventures' on the school/setting site

An increasing number of schools now utilise their own sites for a range of outdoor activities. The Council strongly encourages this approach due to its low cost and frequent accessibility; the Council can provide significant support, advice and training through the Outdoor Education & Environment Team.

Activities of which we are aware range from gardening/growing activities, Forest school activities, camping, 'Team Building', mobile climbing walls, geo-caching etc.

The Council does not operate an approval system for such activities, However, we wish to offer the following advice to schools/settings as they develop new opportunities either 'in-house' or by employing external providers:-

- Do carry out and record a risk assessment for new activities. This should not be an onerous task, and should always form a key element when developing new activities. The risk assessment should be reviewed in the future on every occasion that the activity is repeated, and a note made of any amendments (e.g. any additional hazards presented by the special needs of a particular pupil)
- Do consider your choice of materials, how they are used for 'team building' and 'problem solving' type activities, and how closely the group should be controlled while using the equipment.
- Do consider staff training for grounds-based activities, especially for those which may offer more significant risks such as fire-lighting, outdoor cooking, using hand tools for conservation work etc.
- Ensure that any contractor has adequate 3rd party liability insurance, and you are absolutely clear about your contractual obligations, including any costs that you may have to bear in the event of cancellation.
- When gardening and growing, remember the need for simple hygiene, and take advice on suitable plants/animals for a school/setting environment.
- When considering larger scale developments (eg. School climbing walls, on-site MTB tracks, High Ropes structures etc.) seek further advice with reference to their safe installation, maintenance and staffing/supervision needs.

School Climbing Walls – Record keeping

Where a school or setting has an on-site climbing wall where either top roping or lead climbing is undertaken then it is essential that clear records are kept of:-

- Operating procedures
- Safety equipment purchase dates, inspection dates
- Staff qualification and training, training updates.
- Belay point inspection dates

KEY CONTACT NAMES AND CONTACT DETAILS

| | | |
|-----------------------|--|--|
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Technical Experts

To maintain the DCC AALS License we occasionally require the services of an agreed 'technical expert'. Experts have been identified for Canoeing/Kayaking and improvised rafting, Rock climbing/mountaineering and Off -Road Cycling. Further details can be found on [Evolve](#).