

Shakespeare
Primary School

Shakespeare Primary School
Educational Visits Policy
2025-2026

Health Safety and Wellbeing Team

Policy Handbook for Educational Visits 2021

Changes made in 2017 have been highlighted in red.

Changes made in 2018 have been highlighted in green.

Changes made in 2019 have been highlighted in purple.

Updates made in 2020 in BLUE.

Updates made in 2021 in BROWN



Introduction

As we enter a new normal the future of educational visits is extremely precarious. On a positive note we are being encouraged to take learning outdoors, which will present its own challenges given our climate but not unsurmountable. Check out Evolve for resources and ideas.

At the time of writing only day visits are permitted by Government. LCC follow government Covid-19 guidance therefore community and voluntary controlled schools must do the same. The OEAP is working hard behind the scenes, as are some MPs, pressing Government to allow the reopening of outdoor residential establishments that are Covid Secure. Some independent centres, popular with Leeds schools, have been very honourable reimbursing money quickly but are now on the brink of closure. Others, part of larger chains, have proved very difficult and it has been challenging to recoup all monies for visits that could not take place.

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Leeds City Council Educational Visits Policy

1. General statement of policy.

- 1.1 Educational Visits raise expectations, extend learning for all young people and provide opportunities that some individuals may not encounter in their normal lives. As such, Leeds City Council fully supports Educational Visits and the positive experience they bring.
- 1.2 Leeds City Council recognises the importance of its role and in having robust arrangements in place to help ensure the health, safety and wellbeing of both employees and service users (including school pupils).
- 1.3 Foundation, Trust, Voluntary Aided and Diocese schools' approval of category 3 educational visits (overseas, overnight and adventurous) has been delegated to the Head. Schools with the appropriate level of SLA (Business Partner level HR SLA or Enhanced Health and Safety SLA) can request a pre Head approval check of a form by an adviser. To do this your EVC should add a Note to the form requesting such before submitting to the Head for authorisation.
There is no change for Community and Voluntary Controlled schools.

2. General Principles.

- 2.1 Leeds City Council guidance is based on the OEAP National guidance, [which follows Government guidance](#), and is updated annually.
- 2.2 Visits are categorised into 3 types; category 1 for activities that are part of the normal practice of the organisation (e.g. regular/curriculum swimming), category 2 for day visits (e.g. museums) and category 3 for visits that are overnight (any activity between 2am and 6am), abroad or adventurous.
- 2.3 Visits in categories 1 and 2 are approved by the headteacher/head of centre.
- 2.4 Visits in category 3 must additionally be approved by the Leeds City Council Health, Safety and Wellbeing Team (HSWT).
- 2.5 Leeds City Council uses EVOLVE (Educational Visits On-Line Virtual Environment) and, since December 1st, 2010, Evolve has been the only system in use for visit approval in a maintained school in Leeds.
- 2.6 **EVOLVE should be used to plan all educational visits.**
- 2.7 The [visit leader](#) is responsible for the planning of the visit, completing all the required documentation and entering on to Evolve.
- 2.8 The school/centre/service policies apply on educational visits, e.g. accident reporting, administration of medication, etc.

3. Organisation.

- 3.1 Visits should be planned and led by a visit leader and the visit leader has overall responsibility for the health and safety of participants on a visit.
- 3.2 The visit leader is responsible for ensuring risk assessments are undertaken prior to the visit taking place. In most cases, a pre visit should take place.
- 3.3 The Educational Visits Coordinator should scrutinise and approve each notification before passing it on to the headteacher/head of centre/service.
- 3.4 **It is not necessary to obtain permission for an individual to participate in a visit taking place between the hours of the school day. Your own establishment**

policy may dictate that you do obtain permission or gain it on an annual basis. For category 3 visits permission should be in a format based on the E1 form. Verbal consent is not acceptable. eConsent is acceptable if secure. (see 4.3d- Parental-Consent – National Guidance – www.oeapng.info)

- 3.5 All notifiable visits (category 3) MUST be submitted to the HSWT via EVOLVE 20 working days before departure.
- 3.6 The travel insurance through our School Journey Policy with Zurich Municipal is only valid once a category 3 trip has been approved by the HSWT.
- 3.7 In exceptional cases, with prior warning, notifiable visits submitted within the 20 days may be checked and approved at the discretion of the Team.
- 3.8 An Auto Alert feature warns Visit Leaders when a visit already on the system is about to breach the 20 day period and then again 7 days before.
- 3.9 All off site visits must receive sufficient time and attention to be planned adequately. Evolve records dates and times of uploaded documents; the individual uploading documents; and subsequent authorisations/approvals.

4. Monitoring.

- 4.1 Leeds City Council aims to monitor 5% of educational visits across a range of schools, phases, venues and categories.
- 4.2 Some visits selected for monitoring will be notified to the headteacher/ head of centre and EVC of the establishment.
- 4.3 Leeds City Council will monitor a greater proportion of visits without prior notice.
- 4.4 The adviser will attend the visit to observe and will not be able to supervise pupils. The adviser will intervene in a visit if the health and safety of the participants is at risk.
- 4.5 At the conclusion of monitoring, in most cases, the adviser will complete the EVM monitoring form and give the carbon copy to the group leader. When this is not possible a written report will be emailed to the school at the earliest opportunity. A certificate will also be sent to the school displaying a grade.

5. Notifications.

- 5.1 Notifications MUST be submitted to LCC a minimum of 20 working days before the departure date. (see 3.5; 3.6; 3.7; 3.8; 3.9 above)
- 5.2 Emergency notifications, where an opportunity has been offered to a group at short notice, are possible if the visit leader speaks to an adviser before submitting the notification.
- 6 Please note that travel insurance through our School Journey Policy with Zurich Municipal is only valid once a trip has been approved by HSWT.
- 6.1 Visits that go without approval twice may result in a letter being sent to the headteacher/head of service and the governing body informing them of the potential implications.

Glossary and definitions

LCC Leeds City Council

2021 / version 16

HSWT	Health, Safety and Wellbeing Team. This is the team which gives advice and approval for educational visits. The most up to date contact details for the team are held on EVOLVE.
EVC	Educational Visits Coordinator. The competent person designated in school to be responsible for educational visits. It is a role that must be undertaken by someone in each school, ideally this is undertaken by staff other than the headteacher. NG recommends the one day EVC training course.
EVOLVE	The electronic visit planning and notification system used by Leeds City Council. http://leedsvisits.org.uk
C1	Category 1 visits- local and regular activities e.g. curriculum swimming.
C2	Category 2 visits- day visits, e.g. museum.
C3	Category 3 visits- visits abroad, adventurous or overnight (2am – 6am).
OEAP	Outdoor Education Advisers Panel
NG	National Guidance, the guidance for the management of outdoor learning, offsite visits and learning outside the classroom. www.oeapng.info
LOTQCB	Learning Outside the Classroom Quality Badge
SFARP	So Far as is reasonably practicable.
VL	Visit Leader, the person in charge of the whole visit on that day and who is present during the visit. Visit Leader training is available.
GL	A group Leader, the persons who will lead groups within the visit under the direction of the Visit Leader.
HT	Head Teacher
HOC	Head of Centre
HOS	Head of Service
MOS	Member of staff- an employee of the school.
DBS	Disclosure and Barring Service check
SIMS	Schools Information Management System
RA	Risk Assessment
IPRA	Individual Pupil Risk Assessment
KADDI	Visit data base on Evolve
Covid Secure	A declaration that a provider has followed the government's guidance and implemented the 5 steps to safer working together.

Introduction

EVOLVE is an electronic visit planning and notification system that can be accessed over the internet and is mostly paperless thereby vastly reducing the amount of forms required to plan and deliver an educational visit.

- *EVOLVE is a PROCESS that should ensure safe and enjoyable educational visits whilst protecting the visit leader from criticism and potential legal action in the event of an accident or incident.*

Educational visits have impact not easily achieved through other means and clear aims and objectives ensure safe practice. Educational visits offer opportunities for achievement to individuals across the spectrum of ability. They can stimulate and reinforce a positive attitude towards learning and are recognised as achievements by facilitators and peers alike. Residential outdoor activities can produce improvements in the relationships that teachers and leaders have with young people and in their relationships with each other.

Educational visits

- raise achievement by boosting self-esteem and motivation;
- develop key skills;
- develop social education and citizenship;
- promote education for sustainable development;
- promote health and fitness.

The aim of these guidelines is to provide a framework within which organisations can assure themselves that their visits provide good value for their charges and are undertaken in a safe manner, with suitable and adequate controls in place where required.

Any enquiries about educational visits or this handbook should be directed to the HSWT.

This Policy handbook is organised in the same order that EVOLVE asks for details to make the information easier to follow. Supplementary information is listed in the appendices.

An important source of information is National Guidance for the Management of Outdoor Learning, Offsite visits and Learning Outside the Classroom available at www.oeapng.info.



• SPECIFIC GUIDANCE FOR YOUR ROLE

- Visit Leader
- Assistant Leader
- Parents
- Employer
- Educational Visits Coordinator
- Head / Manager
- Governors

'Safe Practice in Physical Education and Sport' from the Association for PE is also a valuable source for information. www.ukcoaching.org/safepractice £44.90 + p&p



Educational Visits On Line Virtual Environment

Training is offered both on a bespoke basis and also held centrally, although most users find the system simple enough to use without training.

Use of EVOLVE for category 3 visits was mandatory from December 1st, 2010, **and now should be used for ALL visits in other categories.**

The website address is <http://leedsvisits.org.uk> and this can be accessed anywhere with a web connection. To login you need to request your username and password from the EVC at your establishment. Your initial password is likely to be "password2" and this is the password that we will always allocate to you. This can be changed in MY PROFILE.

When you login for the first time you should go straight to MY PROFILE and ensure that your personal details are correct. EVOLVE is entirely electronic and you should ensure that your email address is correct.

You will find extensive guidance in the HELP section. (top right?)

To begin add your visit by clicking on ADD, the blue tab.

Visit Name

There are thousands of visits on EVOLVE and so it is important that there is an organisational structure in naming the visits. This is to both ensure consistency across all sites and also to make it easier for users to find visits.

The recommended structure is as follows.

1. Year.
2. Special code- if relevant.
- 3. Venue – essential.**
4. Class/year/group
5. Initials.

For example.

2011 Alton Towers Y5 PBD

The special codes are used for particular groups within education.

CC	cluster coordinator events.
LAS	Leeds Active Schools.
1419	Visits run by a 14-19 offsite provider
LCC	Visits run by a Leeds City Council department
EP	Very specific activities run for schools by an external provider

The above codes make it easier for users to spot when a visit is coming to them that is not being run directly by the establishment.

The Cloning / Copying of a previous form by the Visit Leader is now active – see HELP? Visit Leader now able to allow a user not taking part in the visit access to the form.

Categories

Evolve automatically puts visits into a category. There are 4 main boxes and you select as many of the boxes as are applicable to your visit. Some visits have all four boxes ticked. If your visit does not fit into any of the categories then the next box down says NONE OF THE ABOVE. Selecting this box would mean that the visit is subject to delegated approval i.e. approval by your HT/HOS. Selecting one of the first 4 boxes would mean approval must be sought from the local authority.

Evolve only distinguishes between notifiable (notifying the LA) and non notifiable visits but there are actually 3 categories. **The LA is not now notified of category 3 visits from Foundation, Trust, Voluntary Aided, Diocese as well as Academy schools (see 1.3 above). Schools with the appropriate level of SLA (Business Partner level HR SLA or Enhanced Health and Safety SLA) can request a pre Head approval check of a form by an adviser. To do this your EVC should add a Note to the form requesting such before submitting to the Head for authorisation.**

Category 1. Visits which are wholly within the establishment's normal work period, specifically to support the curriculum and very low risk. Examples of this would be curriculum swimming, local church, local library, local park, etc. These can be planned on EVOLVE with 1 entry for a whole year e.g. selecting all the swimming sessions rather than a separate notification for each individual session.

Category 2. Visits which are day visits, not adventurous, overnight or abroad and general medium risk. These are the classic visits that make up the bulk of those undertaken by schools. Examples would include museums, art galleries, fieldwork, leisure centres, theme parks and so on. They may extend beyond the working day.

Category 3. Visits that are not in the other 2 categories and are abroad, overnight (anything occurring between 2am & 6am) or adventurous. Adventurous activities are explained on the next page but include paddling in the sea. Activities are deemed to be in this category if there is a higher risk involved and also if there are statistically more accidents reported. If in doubt then please refer to the list on the next page or call the HSWT.

Onsite Enrichment.

This refers to activities that occur on site. This could be used to control access to facilities such as a pool or a climbing wall on site.

Joint visit.

This is a function that will be used by Academy chains, multi Academy Trusts, and 14-19 providers. When choosing this option you will be given a list of schools to select. When your visit is approved by your HT/HOC/HOS the visit will be passed to each school you select to approve.

It is now recommended that maintained schools undertaking a joint visit or events with Leeds Active Schools or via Cluster Coordinators complete individual Evolve entries and do not use the joint visit function.

Leeds Active Schools will provide risk assessments for their events which can be found under the LAS tab on Evolve. Teachers from individual participating schools will retain responsibility for their pupils throughout such events including travel to and from the venue.

Adventurous Activities

These are defined as activities which;

- Require the centre to be AALA licensed, OR
- Require the leader to have a National Governing Body qualification, OR
- Require specific competence and experience beyond that of a casual participant.

If you have significant experience of an activity e.g. rock climbing, but no recognised qualification it is possible for us to arrange for you to be assessed on your competence. For further details of please contact the HSW team.

Padding in the sea is defined as an adventurous activity due to the inherent dangers of open water. Swimming in the open ocean is not normally approved.

Date: 16th July 2019

Subject: Licensable and Non-licensable Activities

<https://webcommunities.hse.gov.uk/connect.ti/adventureactivitiesnetwork/view?objectId=492421>

ALF- Adventurous Leader Form

If you select the option “adventurous activity led by establishment staff” Evolve will popup a form asking you to detail what your experience and qualifications are to lead that activity.

For example, if a MOS wishes to lead rock climbing, they can do but they must show that they have a qualification AND/OR current relevant experience.

Some types of activities require a NGB (National Governing Body) award to lead that activity and some of these can be seen above. If you are very experienced in that activity but do not hold the award you can use the ALF form to detail your experience for your HT/HOS/HOC to consider.

Educational aims and objectives

EVOLVE will ask you to enter the objectives of the visit. It is important to remember that external bodies may ask to see this form and so some thought should be given at the planning stage as to the learning objectives for the visit.

The categories below the objectives are how EVOLVE sorts the visits to enable you to use the search function.

Visits dates

For a residential activity EVOLVE will require you to enter a start and a finish date. For all other types of visits you can enter multiple dates. Click on the dates that apply to your visit or visits and each will turn red. When you have finished selecting, click on the UPDATE button. Your visit dates will then appear in a list, each with a little red cross next to them. If any of the dates are wrong you can click on the cross to delete them.

For some types of visits you can select multiple dates. For example, curriculum swimming tends to run on the same day of the week with mostly the same children and so one entry with multiple dates would be sensible here.

Sports fixtures and some repeating lessons would also fit into this scenario. You can alter details by adding a note to the form.

It is also possible to keep a form 'live' within a school year by entering a date at the beginning of a period i.e. year or term and a date at the end of such. Each visit within this time span can be recorded in a note indicated to be read by the EVC. This option could be used for irregular dates i.e. fixtures and should be used sparingly.

External Providers

A provider is any organisation providing you with a service e.g. Nell Bank, Kingswood, Robinwood, Buckden House, Hollywood Bowl, Xscape. The majority of these providers will hold a quality mark or badge verifying that they meet expected health and safety requirements as well as providing public liability cover. You can check this via the **E2 tab** or **KADDI** icon in RESOURCES on EVOLVE. A town cannot be a provider but a hotel can be. Major organisations such as local government institutions and national transport networks will fully meet expectations and do not require the completion of a provider questionnaire. You have to confirm on Evolve that you are satisfied that the provider will deliver quality, safely **and do not have to attach either E2 or E3 to the form.**

If in doubt then please call the HSWT.

There are lists of popular providers in RESOURCES – GUIDANCE etc – E2 and E3 tabs.

If your provider is not listed when entering a visit, you can click on + Provider to enter their details yourself.

You can add more than one provider in case you are using multiple providers in one day and you can also add accommodation separately from a provider.



The shore of Ullswater out from Howtown, OBMS

Adventurous Activities Leadership

On this page you are choosing the activities that you are intending to undertake. There is a multi-activity option or simply click on each activity in turn and they will be added to the form.

For each of the activities you choose you need to specify who is leading the activities and that can be a member of staff or the provider. For most activities that are adventurous the activity would be led by the external provider and this is the person you would specify. If a member of staff is leading an adventurous activity then that leader must be competent to do so.

Competence = experience, evidence of continued activity + qualifications

OR

Competence = experience, evidence of continued activity + statement from a technical expert.

Please remember that the EVC and the HT/HOS/HOC, when they submit the notification, are stating that the leader is competent and fit enough to lead the activity. They are also verifying that ALL accompanying staff are physically and mentally fit to undertake the expected duties of the visit. If a qualification is required then the certificate should be scanned and uploaded to EVOLVE, it is not sufficient to have the certificate on paper.

When you undertake EVC or EVOLVE training this will be added centrally to your EVOLVE account but all other qualifications pertinent to Educational Visits must be scanned and uploaded. Details of how to do this can be found in the help section on EVOLVE.

Qualifications should be recorded in the Awards section of staff profiles on EVOLVE along with any statements of competence from technical experts.



Acorn Adventure Brecon Beacons

Travel Arrangements

The travel arrangements refer to how you will reach your destination and how you will reach the activities once you are at your destination. For example, you might use one coach company to reach a centre such as Robinwood, and then use Robinwood's minibuses to access activities once you are on site.

It is common for any one visit to use more than one transport method. Below are some definitions and general guidelines. If you have more detailed questions then please contact the HSWT through EVOLVE or over the phone.

Coach / Bus	Use the latest Coach Travel risk assessment – 2016. Please ensure that you know what kind of coach / bus you have hired particularly at peak times. Are you expecting it to remain with you? All should have seat belts fitted. There are different risk assessments for double deckers, service buses and if there is a wheelchair user present.
Taxi	It is perfectly acceptable to use a taxi company for smaller visits. You should ensure that you are using a preferred provider and ideally a company that have Disclosure Barring Service (DBS) checked their staff. You should avoid a 1:1 situation in the taxi where possible.
Walk	This is a common method of transport but should not be confused with walking between activities. Walk in this context specifically refers to walking to a venue, e.g. walking to a local museum from the school.
Car- private	Where a member of staff uses their car to transport individuals. This is common especially for visits such as sports fixtures. An E4 MUST be filled in each year for any member of school staff transporting pupils in their own cars. Business or Class 1 insurance is mandatory. Schools can purchase insurance to cover employees using their vehicles. <ol style="list-style-type: none"> 1. Always transport pupils from A to B and DO NOT drop pupils back off at their homes on the return journey. 2. Avoid, unless impossible, being alone with a young person. 3. You are strongly advised not to get involved with organising parent drivers. To avoid this situation it is advisable to ask parents to make their own arrangements. Please note that for a visit supporting the curriculum and in school time the school is responsible for arranging transport. Contact HSWT for clarification if needed. 4. You may need to provide booster seats for smaller children. 5. It is advisable to travel in convoy to be able to react to incidents such as breakdowns or illness.
Car- establishments	It is unusual for a centre to have its own car but if it does the same guidelines as above apply.
Car- hired by establishment	If you hire a car to transport children. Guidelines as above. Please ensure the hire company understand that you intend to transport children in the car.
Establishment mini bus	This is YOUR OWN mini bus and not one that you have 'borrowed' from another centre, covered by your Section 19 Permit. Your own minibuses MUST be subject to regular inspections and servicing, should have an MOT, be insured and inspected before use. The driver should hold the MIDAS qualification, which is valid for 4 years.
Hired self drive minibus	This is where you are hiring a minibus to drive yourself or where you are 'borrowing' a minibus from another centre. Same rules as above would apply.
Bicycles	These are sometimes used on visits. If you use bicycles as your mode of transport then please ensure a basic check of the bike before use, that it

	is adjusted for the size of the child and that helmets are provided. It would be advisable for the leaders to be wearing high visibility vests or jackets.
Aeroplane	This is a common mode of transport. Please ensure that there is a strong contingency plan for return of pupils due to sickness etc.
Train	Please plan carefully for cancelled/delayed trains as these frequently affect visits.
Service Bus	Please be aware that for large groups you may wish to plan carefully which buses to take as during certain times of the day they will be full.
Underground	Rush hour traffic can make this transport difficult to use. Please ensure that all children (and supervisors) are carefully briefed for situations such as individuals left on platforms and groups having to split up. For larger groups you should spread out fully along the platform and operate as smaller groups.
Ferry	The party should be carefully briefed as to where they may go on the ferry and a meeting point on the boat. Please have a plan in place for individuals/supervisors that become sea sick.
Le Shuttle	This is where the pupils remain on the coach and the coach goes on the train.
Tram	
Helicopter	
N/A	This is used for onsite enrichment where there is no transport.
Eurostar	This is where children cross the channel by train but as foot passengers.
Parental responsibility	This is where you ask parents to make their own arrangements. Please ensure that you make it clear to the parents that they are responsible for their child until they reach the meeting point. For visits during the school day, supporting the curriculum, schools should be aware they are responsible for arranging transport.

Travel Company / Providers

This section on Evolve is where you enter the details of the company providing your transport. You can select the company from a list or enter a new company. If you are using a company not on the list it would be advisable to speak to the HSWT to see if the company is known. Always confirm bookings and re confirm arrangements just prior to departure.

You can enter more than one company if you intend to use several. If you are using the centre's own transport there is an option called "Tour Operator/Activity Centre Provided" There is a list of the providers in Guidance and Resources that have been centrally checked by LCC. **If the company you want to use is not listed as having been checked by LCC you can ask the HSWT to send the E3 Travel Provider Checklist/Questionnaire to the company and add.**

Insurance / Financial Loss

Booking terms and conditions directly affect the level of insurance cover for a visit. Schools must clarify how the terms and conditions will apply if you, or the provider (venue or travel operative if used), have to cancel, or are prevented from going ahead because of COVID-19 or its effects. COVID-19 or its effects could include local (either affecting the school or the provider) or national lock down; accommodation closing for deep cleaning; school staff unavailability due to needing to self-isolate; provider staff shortage due to staff needing to self-isolate; pupils not able to attend due to self-isolation.

Our School Journey Policy with Zurich Municipal does not necessarily cover all unrecoverable losses. At this point in time it is unclear how the insurance industry will respond to the impact of Covid-19 on its industry and how this will affect future policies.

Staffing and Volunteers

A member of staff is anyone employed by the school or service and a volunteer is anyone else in the school or service. A visit does NOT have to include a teacher but should include a member of staff. The most important deciding factor for supervisor selection is the competence of the member of staff.

Volunteers can attend visits and commonly do e.g. parent helpers, governors, community support officers, student teachers, work experience, etc. Any person not employed by the school is classed as a volunteer.

A volunteer must be DBS checked if they are helping on an intensive or regular basis, if they are on residential visit or if they will be alone with the children. On the majority of visits that schools undertake the occasional parent helper would not need to be DBS checked BUT that helper should be in line of sight of a staff member at all times.

Student teachers/ leaders or other students on a placement in a setting can supervise groups on a visit but must have an experienced member of staff to accompany them.

Some visits are led by outside agencies such as Children's University; there should still be a member of staff on these visits- the establishment's or service's duty of care towards its individuals cannot be discharged to a third party.

If your staff have been installed on to EVOLVE you will be able to select the staff leading the visit from the drop down list. You can then click on amend accompanying staff and volunteers and select your staff and volunteer supervisors from the list. EVCs can add individuals to Evolve via the dashboard (cogs icon).

Ratios / Early Years

Evolve will ask you to enter the ratio of supervisors to participants. You may find the table below as a quick reckoner for the number of supervisors required.

To exceed the recommended ratios below there should be a suitable and sufficient risk assessment in place. Ratios should consider:

- Meeting the needs of those with behavioural issues
- Meeting the needs of those with disabilities
- Meeting the needs of those with specific medical needs
- The nature of the activities
- The venue
- Amount of time i.e. residential versus day trip to allow for staff rotation
- Remoteness
- The Weather

Recommended Ratios (under 8s) **see next page**

Recommended ratios (over 8s)

LCC recommends the following ratios:

Under 3 years - 1:3

Age 3-5 (Foundation) - 1:4

Age 5-7 (Key stage 1) - 1:6

Age 7-11 (Key stage 2) - 1:10

Age 11-14 (Key stage 3) – 1:15

Age 14-16 (Key stage 4) – 1:15

Age 16-19 (Key stage 5) – 1:20

BUT a minimum number of adult supervisors with any group could be 3

The Early Years Foundation Stage (EYFS) Statutory Framework no longer sets out different requirements for minimum ratios during outings from those required on site. It is not unusual for a ratio of 1:1 to be necessary.

See 3.28,3.29,3.30,3.85,3.66 just below.

3.28. Staffing arrangements must meet the needs of all children and ensure their safety. Providers must ensure that children are adequately supervised and decide how to deploy staff to ensure children's needs are met. Providers must inform parents and/or carers about staff deployment, and, when relevant and practical, aim to involve them in these decisions. Children must usually be within sight and hearing of staff and always within sight or hearing.

3.29. Only those aged 17 or over may be included in ratios (and staff under 17 should be supervised at all times). Students on long term placements and volunteers (aged 17 or over) and staff working as apprentices in early education (aged 16 or over) may be included in the ratios if the provider is satisfied that they are competent and responsible.

3.30. The ratio and qualification requirements below apply to the total number of staff available to work directly with children¹⁹. For group settings providing overnight care, the relevant ratios continue to apply and at least one member of staff must be awake at all times. Exceptionally, and where the quality of care, safety and security of children is maintained, changes to the ratios may be made.

3.65. Children must be kept safe while on outings. Providers must assess the risks or hazards which may arise for the children, and must identify the steps to be taken to remove, minimise and manage those risks and hazards. The assessment must include consideration of adult to child ratios. The risk assessment does not necessarily need to be in writing; this is for providers to judge.

3.66. Vehicles in which children are being transported, and the driver of those vehicles, must be adequately insured.

Lone Supervisors

It is recommended that visits are not planned with a lone supervisor. The following criteria should be detailed in a suitable and sufficient risk assessment if lone supervision is required.

1. The visit must be a category 1 or 2 only.
2. The visit must take place a short distance from the school/base i.e. 10 minutes driving distance or 10 minutes walking distance.
3. The supervisor must have a procedure in place to summon help.
4. The route to be taken and the duration must be noted in the risk assessment.
5. The supervisor must have no health restrictions that could reasonably require attention, e.g. epilepsy.
6. The participants must not have medical conditions that could require intensive intervention.

7. The participants must not have extreme behaviours that could require physical intervention.
8. Under the Management Regulations a lone worker must have a Lone Worker Risk Assessment. Guidance on this can be given by the HSWT.

Attendees

Attendees are anyone on the visit who is not a supervisor. This would also include persons such as siblings of supervisors participating on the visit.

The age range is important because it is the age of the participant that defines the ratios for supervision. If the age range is mixed then there is a section that clearly says mixed.

To ensure a smoother planning process you should enter the maximum number of children that you intend to take on the visit. It is easier to reduce the number of participants than it is to increase them. A change in numbers after approval should be indicated in a NOTE at the foot of the visit form.

The visit register is a module available to schools to use if they wish. To use the visit register the pupils have to first be installed to EVOLVE and this is done through an export process in SIMS. Only the EVC of the school can import pupils.

The use of this module is entirely voluntary but can be a valuable tool should the school wish to use it.

Insurance

“The purpose of Insurance is to protect the policyholder against events which are fortuitous by nature. Where a known situation exists and a booking is made with the knowledge of this it is unlikely that an insurance policy would provide cover”.

Most schools are covered by Zurich Municipal insurance for their educational visits. The travel insurance provided through LCC is only valid once a trip has been ‘approved’ using the EVOLVE system. Some trust schools and academies will be covered by a different insurance company. All schools are asked to name their insurer.

When you are taking someone with a medical condition sometimes this has to be declared to your insurer before you travel. Generally speaking, if you believe that a child may require medical attention during a visit or is at a higher risk due to a medical condition then you should consult with the HSWT and/or your insurer.

Some types of medical conditions require a ‘fit to travel’ note from the child’s GP. You may consult the HSW Team for advice.

Staff or volunteers over the age of 65 must be declared to the insurance team prior to the visit – contact is Matthew Southwell – 3951700 for insurance queries.

Covid-19 / Pandemics

Booking terms and conditions directly affect the level of insurance cover for a visit. Schools must clarify how the terms and conditions will apply if you, or the provider (venue or travel operative if used), have to cancel, or are prevented from going ahead because of COVID-19 or its effects. COVID-19 or its effects could include local (either affecting the school or the

provider) or national lock down; accommodation closing for deep cleaning; school staff unavailability due to needing to self-isolate; provider staff shortage due to staff needing to self-isolate; pupils not able to attend due to self-isolation.

Our School Journey Policy with Zurich Municipal does not necessarily cover all unrecoverable losses. At this point in time it is unclear how the insurance industry will respond to the impact of Covid-19 on its industry and how this will affect future policies.

Pre-visits

Where it is reasonably practicable to do so, the destination should be pre-visited within the last 12 months.

For some types of visits this is a necessity and for some types of visits it will not be practicable to do so. Some common examples of each type are given below.

Pre-visit required

- Town centres- these change regularly and the venues should be seen before a visit.
- Unknown centre- if you are going to an outdoor centre for the first time.
- Higher risk activity- taking children rock climbing where you are the leader.
- Where your children are higher risk e.g. behavioural problems, medical issues, very young children.
- Where there is a specific route to be followed, e.g. DoE expeditions, fieldwork.
- Where there is extensive remote supervision.

Examples of where a pre-visit may not be practicable.

- Foreign country- although considerable research of the area should be completed.
- A very distant venue in this country, e.g. a site 100+ miles away.
- Where you use the same site every year and the manager briefs you as to any changes since your last visit.
- Where the cost to make the pre-visit in terms of time and money would be disproportionate to the level of risk in undertaking the visit.



Toasting marsh melloes at Cliffe House Shepley Kirklees

Emergency procedures

Prior to embarking on any out of establishment visit the Governing Body and HT/HOS/HOC must ensure that the establishment has a suitable policy for dealing with any emergency situation. Emergency Contact training is included in the one day EVC training course. A 2.5 hour session covering this can be booked via the HSWT.

If an emergency occurs it is essential that every person supervising the visit understands their respective role in the emergency and is able to effectively put the policy into action.

An emergency can include any untoward occurrence that has a significant effect upon the visit. It could include the breakdown of transport, a serious or fatal accident, the onset of ill health amongst the party and supervisors, a fire occurring to the party's overnight accommodation, flooding to a campsite, a lost child etc.

The Visit Leader will automatically take charge in the event of an emergency – if the Leader is unavailable to do this the deputy must take charge. Where both the Leader and deputy are incapacitated the most senior or experienced supervisor remaining should take charge. The chain of command and deputies must be identified at the planning stage.

All persons on the visit must be informed about the emergency procedures to follow.

The establishment must identify at least 1 person who will be the home-based contact for the duration of every off site visit. This person, along with the Visit Leader, will need to have copies of the list of names and addresses for everyone undertaking the visit – children and adults, as well as the contact numbers for the Headteacher, Chair of Governors, and [Leeds City Council Critical Incident Line \(formerly the Crisis Line\)](#).

Visit Leader is able to allow a user not taking part in the visit access to the form.

When an emergency occurs the priorities are to:

1. assess the situation
2. safeguard the remaining members of the group
3. attend to any casualties

4. inform the emergency services and everyone else who needs to know of the incident – this can range from the Headteacher and parents to the Director of Childrens' Services and Chief Executive, Leeds City Council.

If the emergency involves a *serious* or *fatal* accident the police and Leeds City Council must be informed immediately on **0113 3783645 *speaking to the officer or leaving a message if out of hours.***

The police will endeavour to withhold the names of any victim until next of kin have been informed – if the incident were to occur outside of Great Britain, however, this cannot be assured. Measures will need to be in place to support the next of kin of anyone suffering a serious or fatal accident.

Where a serious or fatal accident occurs the media will, inevitably become involved. This is likely to be very soon after the incident happens and may occur well before parents and next of kin can be informed.

Contact with the media will not be able to be avoided. It is essential that a nominated person is identified who will co-ordinate media briefings – this should be a senior manager from the school and could be the Chair of Governors, Headteacher, Deputy Headteacher, nominated governor. When briefing the media it is important to state factual information only and not to divulge the names of any person involved in any incident. The LCC Communications Team can provide assistance in handling the media. It is advisable to have a pre-arranged press conference area that can be used to brief the media. It is also advisable that, in order to manage the media, statements are made at regular intervals and at times arranged with the media – if the school does not inform them they will get their information from elsewhere.

Arrangements should also be in place to ensure that contact can be made with any group on a visit should there be an emergency at home.

Contact details

In an emergency telephone the Leeds City Council Critical Incident Line (formerly the Crisis Line) on

0113 3783645

06:30 - 22:00 Monday to Friday.

08:00 - 17:00 Weekends and Bank Holidays.

The line is no longer available overnight but you can leave a message and your call will be returned asap.

Action to be taken by the Visit Leader in the event of a serious accident or fatality:

- Ascertain the nature and extent of the emergency
- Protect the party from further injury or danger and ensure all members are accounted for.
- Render first-aid to casualties.
- Telephone rescue or emergency services.
- State that it is an emergency requiring immediate action and priority.
- Give your name, address/location and telephone number.
- State the time of and location of the incident.
- State the nature of the incident and action taken so far.
- State the names of the individuals involved, the extent of injuries and where they are now located.

- Remove the party to secure accommodation and ensure they are under the care of a staff member who will protect them from media attention.
- Telephone the nominated contact person(s) giving all the above information.
- Restrict pupil access to telephones – including mobiles.
- DO NOT MAKE ANY STATEMENTS TO THE MEDIA – direct them to the school or Leeds City Council's Communications Team.
- Complete relevant accident reporting forms if required.
- The emergency SMS service lets deaf, hard of hearing and speech- impaired people in the UK send an SMS text message to the UK999 service where it will be passed on to the relevant emergency service. This service may also work in areas that have poor network coverage.
- CITIZENAID app useful



Accident Reporting and Recording

The same requirements for recording and reporting accidents that are applicable to LCC establishments on a day to day basis are applicable when undertaking off site visits.

Any accident that occurs should be recorded.

Those accidents that result in significant injury must be reported using the form CF50 in the Health and Safety Handbook for Schools. Similarly any violent incidents must be reported on a CF50a. Both CF50 and CF50a are available to download on Evolve.

These forms may be completed and submitted once the visit has finished, however if the incident results in:

- An individual being taken to hospital from the scene of the incident
- a member of staff being incapacitated for at least three days after the event
- or a member of staff suffers a major injury such as a broken bone, amputation of a limb or fatality,

It should be reported to the HSWT as soon as possible (Tel: 0113 3788298), to enable the HSWT to forward a report to the Health and Safety Executive.

Near Misses

It is important that any near misses are recorded and included in any debriefing once the visit has concluded. A near miss is an incident that could have caused serious injury had a person been involved or had the incident not been stopped.

Examples of near misses include:

- A person slipping whilst on a mountain footpath where there is a risk of serious fall.
- Children tripping, without being injured, whilst texting on their mobile phone (N.B. see guidance on mobile phones in section 12)

- A rock falling from a cliff side just before you set off to walk beside the cliff.
- The driver of a coach using a mobile phone whilst driving.
- A parked vehicle moving off despite the brake being on and crashing into a wall
- A tree has fallen across a footpath that was clear yesterday.

Near misses should be reported using form CF50 to the Health and Safety Team.

ALL THE ABOVE CAN ADDITIONALLY BE RECORDED ON EVOLVE IN A 'NOTE'.



Outside Ingleton Youth Hostel

Visit Leader Competence

Competence = experience, continued activity + qualifications
OR

Proof of experience and continued activity + statement from a technical expert.

Experience is defined as having successfully led visits before. This needs to be proven and cannot be taken at a person's word.

Qualifications are defined as certified qualifications in that area or proof of experience and a statement from a technical expert.

A visit leader should not be someone who has never led a group on a visit before. Members of staff should be given the opportunity to be apprenticed into visit leadership by acting as a deputy leader first.

On an inexperienced visit leader's first visit there should be an experienced member of staff acting as a mentor.

For some types of activity a visit leader will need to be qualified to lead that activity or have a significant amount of relevant and up to date experience in that area. For example, a visit leader would need to have a canoeing qualification in order to lead that activity.

In the case where a visit leader has significant experience in undertaking an activity but does not have a qualification for it then it is possible to have that experience certified. The HSWT can arrange for a technical expert to attend and certify that the visit leader's skills are at the correct level to be able to lead the activity. There is a cost attached to this certification.

You only need to have a qualification or award to lead an activity that is defined as adventurous; activities such as walking in the woods or over hills do not necessarily need an award. If you are unsure then please contact the HSWT.

Qualifications should be recorded in the Awards section of staff profiles on EVOLVE along with any statements of competence from technical experts.

The awards section of EVOLVE is the replacement for what was known as the Leeds Register. It is essential that registered leaders upload their qualifications/statements of competence to this area.

Visit Leader training is available throughout the year and it is recommended that all visit leaders attend the training at least once.



Orienteering at Oakwell Hall



Field studies, Ingleborough

Itinerary

EVOLVE will allow two different types of itineraries, one that is typed into the notification and one that must be uploaded. An exemplar, EX1, can be found in the RESOURCES.

For Category 1&2 visits it is sufficient to type the key times into the notification. For Category 3 there must be a full and detailed itinerary even if it is to undertake a single activity e.g. rock climbing. The Category 3 activity itinerary can be typed in or uploaded.

Here are two examples.

1. Example of a Category 2 activity typed into EVOLVE.

1000 Leave school
1100 Arrive at venue
1400 Leave venue
1500 Arrive at school

2. Example of a residential activity itinerary.

1000 Leave school
1100 Arrive at Residential Centre. Intro and bunk assignment
1200 Lunch
1300 Rock climbing and Abseiling
1500 High Ropes
1700 Tea
1800 Night walk (own staff)
2000 Campfire
2100 Shower and bed
2200 Lights out

For Category 3 visits it is essential to have an itinerary to ensure that all activities are risk assessed and that it is clear who is leading the activities. A visit will not be approved without one.

Some centres such as Robinwood and Kingswood the itineraries may not be available to schools until two weeks before the visit date and so a basic itinerary of planned activities should be entered.

We would also need to see a basic itinerary if a member of the school staff were leading any activities at the centres e.g. leading a trust trail activity, etc.

Risk assessment

Risk assessments are a **legal** requirement.

There are 3 distinct types of risk assessment for off site visits:

- Sample assessments, e.g. those available on EVOLVE for you to download and adapt*
- Site specific assessments e.g. those from the provider
- Dynamic assessments e.g. where a change of itinerary has occurred

*The visit leader **MUST** make the risk assessment specific to the school, pupils, activity, time of year, weather etc. It **MUST** not be left as is!

There are many examples of updated sample risk assessments for use by schools and youth groups on EVOLVE. These can be downloaded and then personalised for the visit and the establishment. They are reviewed annual to comply with legislation.

Please make sure that you are using the latest risk assessments found on EVOLVE and sent to all EVCs in a zip file. You should review your RAs annually.

RAs must be completed as per the instructions on the front of the form. Common errors include not entering the ratios; not indicating the venue/activity/destination and leaving the last column blank, i.e. without the responsible persons' initials.

Advice and training on the different types of risk assessments is available from the HSWT.

The most crucial of all the assessment types is the **Dynamic** assessment. This requires everyone supervising a visit to ensure that they base their decisions to proceed or halt a visit on information about the risks present. At all times the prime consideration will be whether or not the least capable child is at risk. If the least capable child is likely to be placed at significant risk when undertaking any activity the activity needs to be reviewed.

Risk assessments must be carried out on any activity that can place any person undertaking or supervising it at risk of injury, with control measures identifying safe ways of carrying out the activity implemented. If no safe means of undertaking the activity can be identified and the risk is assessed as being substantial or unacceptable, the activity should not take place.

All persons accompanying any visit – pupils, staff, and volunteers – must be informed about any risks they may encounter whilst on the visit. The Visit Leader should ensure that the contents of every risk assessment are shared with and explained to all participants on the educational visit and that parents are informed of the existence of a risk assessment and how they may access a copy.

Site specific risk assessments (RAs) are usually supplied by the activity provider e.g. Robinwood. They will normally send you their RAs on request. They can then be checked by the Visit Leader, as far possible, to ascertain that the proposed activities are within the capabilities of each young person. These RAs are specific to the activity on that site and are not transferable. They do not need to be uploaded on to EVOLVE. Only risk assessments for activities and stages of the visit led by LCC employees need to be uploaded.

For pupils that are vulnerable it is usually more appropriate to write an individual pupil risk assessment (IPRA) than it is to alter all the visits RAs to accommodate the child.

EVERY visit will have at least one RA (travel RA). ALL residential visits will need to include a LCC accommodation RA to comply with duty of care responsibilities.

It is the responsibility of the Visit Leader to ensure that suitable and sufficient risk assessments are carried out, and the responsibility of the EVC to read these RAs.

RAs for activities / stages led by LCC staff should be uploaded to EVOLVE to ensure a record of the visit is complete; however in some circumstances it is acceptable to have RAs on paper.

Recent case law has stated that **“if it isn’t written down, it didn’t happen”**. EVOLVE is recognised as a robust record system and it is recommended that EVOLVE is used to plan ALL off site visits.

Please ensure all the requested documents are attached to each notification.

First aid

First aid courses changed their length recently and details of these are below. First Aid courses providers need to be HSE registered.

8 hours (1 day)	Emergency First Aid
16 hours (2 days)	Paediatric First Aid / Outdoor Incident Management
24 hours (3 days)	First Aid at Work

Any visit with children 5 years old or younger, MUST have someone with paediatric first aid attending.

Those visits that can be approved without someone with first aid training present must:

- Be within easy reach of emergency services (20 minutes)
- Have no participants with complex medical needs
- Be low risk (usually day visits i.e. not C3)

Those visits that should or must have someone with first aid training include:

- Visits that occur wholly or partly in wild country i.e. remote parts of the North Yorkshire Moors
- Visits that specifically involve remote supervision for residentials i.e. Duke of Edinburgh expeditions
- Visits that are higher risk i.e. adventurous
- Visits to Lineham Farm & Herd Farm when no centre staff first aiders are in residence

It is recommended that there would be someone on every visit with some first aid training and a first aid kit must always be carried.

First Aid qualifications should be recorded in the Awards section of staff profiles on EVOLVE along with other qualifications. EVOLVE can flag up when a First Aid qualification requires renewal.

For specific advice on first aid please contact the HSWT.



Relationships

When supervisors of an educational visit are in a relationship there should always be a third supervisor on a visit.

When parents are acting as supervisors for pupils in KS2 it is recommended that the parents should not supervise a group containing their own child. For pupils aged 0-7 the school may wish to discuss the reasons for this with the parents.

There will be occasions where the visit leader is related to someone in the group and therefore this cannot be avoided.

When there are supervisors related to each other e.g. a husband and wife team, it is important that a 3rd person is on the visit.

Occasionally a supervisor might request that their own child attend a visit. This is not unusual in Leeds schools but certain criteria have to be fulfilled.

1. The child needs to be either a supervisor or a participant. If they are a supervisor they will need to be mature enough to fulfil that role and may require a DBS check if they are over 16.
2. If the child is a participant then they will need to be the same age as the other participants within a year or so, and old/mature enough to undertake the activities.
3. They will need to be the same gender if the group is single sex.
4. The child should not have any particular needs that would affect their participation more than the other participants.
5. The parent should not be in the same group as their child.

EVOLVE will ask you to declare any relationships.

Medical Needs and Inclusion

EVOLVE asks you to declare any pupils with medical needs.

The two most common types of inhalers commonly found in schools.

1. Salbutamol, the blue instant relief inhalers.
2. Becotide, brown steroid inhalers.

Children who use blue inhalers should have the inhaler with them at all times including when on a visit if they are deemed mature enough to do so. Brown inhalers should be kept by the medication administrator. Schools can now purchase reliever inhalers for use in an

emergency if the child's inhaler is lost or runs out. Please refer to your own school policy and the 'Guidance on the use of emergency inhalers' in RESOURCES on Evolve.

The E1 consent form includes a permission statement regarding the emergency use of inhalers. This must be removed if you have not adopted the guidance as school policy.

Intolerances and allergies are not the same thing. Generally speaking, intolerances cause low level reactions like a rash whereas an allergy will result in severe reactions such as tightening of the airways or anaphylaxis. For those that suffer from anaphylactic shock it is vital that an epi pen is carried at all times. [Latest guidance, available on Evolve, recommends that 2 epipens are taken on an educational visits.](#)

If a child on a visit requires an epi-pen to be carried then staff MUST be trained in how to administer. There is a question to ascertain this on EVOLVE.

There are hundreds of children with specific needs, medical or otherwise, that attend educational visits every year across Leeds and in each case there needs to be careful attention paid as to how they might access the visit. There may be a need to consider some reasonable adjustments to enable them to access the visit such as the examples given below.

1. Attending for the days only.
2. Having a parent or a 121 worker attend (all over 16s on a residential require a DBS check).
3. Choosing a venue that can accommodate the child.
4. Attending for part of a whole visit.
5. Undertaking similar but adapted activities.

PG505 – Supporting Pupils with Medical Conditions in School V4 is now available in schools. See appendix 10.0 Educational Visits and Sporting Activities. see

For children with specific needs an individual pupil risk assessment (IPRA) may be required and this is usually more appropriate than altering the activity RAs. The HSWT can help you with this on request. Any Education Health Care Plan should also be consulted.



Pupils have a right to participate in educational visits.

If the need is behavioural and all reasonable adjustments have been made then there MUST be an IPRA to state this.

Please be aware that parents are likely to challenge any school that refuses to allow their child to participate in an educational visit due to their special needs under the Equality Act and it is vital that all reasonably practicable measures are undertaken to enable the pupil to participate.

ESSENTIAL READING page 47 & 48

The inclusion of children with special educational needs and disabilities (SEND) on trips and other out-of-school activities.

The HSWT team has a specialist in undertaking visits with children with SEN who would be happy to advise you in any aspect of planning or delivery.

SEE 'Reasonable adjustments for disabled pupils' Equality & Human Rights Commission on Evolve.

SEE ALSO Page 46 – Statutory Guidance

41. Schools should consider what reasonable adjustments they might make to enable children with medical needs to participate fully and safely on visits. It is best practice to carry out a risk assessment so that planning arrangements take account of any steps needed to ensure that pupils with medical conditions are included. This will require consultation with parents and pupils and advice from the relevant healthcare professional to ensure that pupils can participate.

Minibus

In order to drive a minibus a person must be qualified under MIDAS. The minibus must also be subject to:

- Appropriate insurance
- Current MOT
- Regular servicing
- A pre check before use (basic checking of brake lights, etc)

Some establishments own their own minibuses and some loan their minibuses to other groups. Such a loan would be entered on EVOLVE as hiring a minibus and entering the loaning establishment as the provider. This also applies with cluster owned minibuses where there will be a named school as the operator.

It is recommended that there are always at least two supervisors in a minibus- 1 driver +1. For very short journeys and where the pupils are well behaved it is acceptable to have just the driver. See 'lone working' as discussed earlier.

For children who are under 12 and under 135 cm there might be a need to be booster seats available if the seat belt cannot be adjusted to suitably fit the person.

Seat belts must be worn at all times.

Sports fixtures

Sports fixtures are higher risk than most activities. Consent must be obtained from parents for their child to participate in a fixture and an exemplar consent form can be found in the appendix.

Lone supervision of fixtures is not recommended because there needs to be a supervisor available in the event of a hospital trip- an ambulance may decline to carry a minor without an adult supervising. Reciprocal arrangements should be put in place with the visiting/host school if lone supervision is planned.

It is recommended for the visit leader to have first aid training and to carry a first aid kit. Due to the nature of the types of incidents usually sustained during fixtures it would be advisable

for Outdoor First Aid or Sports Injury training to be undertaken by regular supervisors. Please note that a supervisor does not necessarily have to be an employee.

The visit leader should carry a mobile phone at all times and should have the contact details of the participants available at all times.

If specialist equipment is required to undertake the sport e.g. shin pads, then all participants must be wearing pads in order to play. Refer to the AfPE Safe Practice in PE, Sport and Physical Activity publication – www.ukoutdoors.org/safepractice

Guidance for heads of PE regarding fixtures can be found on EVOLVE.

Alcohol

It is recommended that alcohol is NOT consumed by participants or supervisors whilst on an educational visit.

There is a LCC policy on alcohol and substance abuse. For further information about alcohol consumption on educational visits please see paragraph 5.2.7 of the policy.

Local Authority Visit Monitoring

The Local Authority has a duty to monitor educational visits. LCC aims to monitor between 5% of all notifiable visits each year. This target is to include:

- Visits in categories 2 and 3
- All key stages
- A selection of venues
- Prioritising venues most used by our schools
- Prioritising schools that have not been monitored and high volume schools
- Prioritising higher risk activities and those not yet monitored
- Prioritising external providers that have not been monitored
- This includes visits beyond the UK

An increasing number of monitoring visits will be unannounced ones.

Details of the monitoring process can be found under the Monitoring tab in RESOURCES on Evolve.

If the adviser has to intervene in a visit to ensure safety then the visit would be deemed as unsafe and the activity would have to be adapted or abandoned.

The adviser will interact with the children and may participate (negotiable) fully with the visit activities. All the HSWT are DBS checked and the DBS disclosure number will be provided on demand.

All the HSWT will keep their ID with them at all times.

School / Service monitoring

Establishments should incorporate monitoring processes within their systems for providing Educational Visits as part of best practice. Under health and safety legislation, monitoring is an integral part of a safety management system. A competent person should be monitoring a selection of visits in any school year.

Those wishing to use the Health and Safety Team to carry out a monitoring visit on their behalf should contact the team at the earliest opportunity to arrange any such visit. Random establishment auditing in respect of educational visits **continues and can be requested by schools.**

Parental consent

Parental consent is required for any young person who is on the roll of the institution **undertaking a visit that extends beyond the hours of the school day**, for example; this would include those aged 19 in a school Sixth form or in a special school or youth group. It also includes visits undertaken by extended services where these are run by a school or on behalf of a school.

Consent can be obtained in 3 different formats for the 3 different categories, but the E1 consent form is detailed enough to be used for all 3 categories of visits. The different formats are discussed below.

The E1 consent form should be scrutinised and amended as appropriate to the needs of the organisation. Remember to remove the emergency use of an inhaler section if the guidance has not been adopted by the establishment.

Blanket consent.

When pupils enter reception class of school, most schools ask parents to sign a blanket consent form that covers a range of activities. These activities are commonly visits to local churches, local shops, local parks, and so on. The blanket consent is fine as long as the school defines the 'local' area that is on the form and the school should still inform parents that their child will be out of school for a period of time on that day.

The DfE advice confirms the fact that written consent is not required for pupils to take part in the majority of off-site activities which happen during the school day, and includes a 'one-off' consent form that schools can use for other activities.

Consent for a category 2 visit.

Day trips are very common in schools, with pupils participating in an average of 3+ visits per year. Consent for these visits should be sought from parents on a visit by visit basis as they are usually out of a local area, commonly involve transport and commonly extend beyond a school day. Consent can be gained using the E1 but schools usually produce a much shorter version personalised to their school in the format of a tear-off slip at the bottom of a letter. **Permission is not required for visits taking place within the hours of the school day unless your own establishment educational visits policy require such.**

Consent for sports fixtures

Sports fixtures should use a consent form similar to the example given in the appendix. In a secondary school, visit leaders can produce a consent form to cover fixtures for one academic year to allow for the variances in team membership and participation.

In a primary school, fixtures are usually set in advance but a similar system to the above could be put in place. Primary schools commonly expect parents to transport their pupils to

and from the fixtures and pupils should only be brought back to the school and NOT to their individual houses. Transporting pupils is discussed in more detail later in this document.

Guidance for Heads of PE on managing fixtures can be found in the guidance section on EVOLVE.

Review

A review must be undertaken following every visit. This can now be done using EVOLVE which will automatically ask for an evaluation of the learning objectives after each visit. This function is available up to 28 days following the visit.

Educational Visits File

If a school utilises EVOLVE to its full potential then EVOLVE will hold the visit forms for the school in 'Establishment Documents'.

Notwithstanding this, parental consent forms, consent for swimming or other hazardous activities forms, and information received from activities, accommodation and travel providers and information received about the locations visited that is **not** uploaded on to EVOLVE must be saved for at least a year. As should all documentation following a near miss or accident. The rest of the documentation can be shredded at the end of the school year IF an incident or accident has not occurred.

SEE Records Management web link in RESOURCES – Guidance, Policies & Docs – on Evolve

This Handbook and the resources contained on EVOLVE should be used as the central document source for any educational visit. OEAP National Guidance for Managing Educational Visits is also a valuable source of information and advice.

www.oeapng.info



Use of Mobile Phones

Mobile phones can be both useful tools and a problem on EVs. For supervision purposes they can be invaluable in maintaining contact with participants. Each group leader must make a decision as to whether attendees should take mobile phones with them.

Generally mobiles are useful tools in ensuring young people are safe if their use is in a structured manner.

Staff are not required to use their personal mobile phones for work purposes and therefore it is recommended that the establishment have a number of mobile phones available to distribute to staff for educational visits.

If participants are taking mobile phones then it would be sensible to give them the contact number of the supervising staff (work mobiles ONLY) and to take the numbers of their mobiles.

Staff **MUST NOT** take photos of pupils on their personal mobile phones.

Some additional points to be considered.

- Will the phones work abroad?
- Is there a signal in the area that you are visiting?
- Parents need to be clearly informed that phones are taken at their own risk and that the establishment and its staff will not be responsible for them.
- Expensive mobiles can be a poor decision in some areas with high rates of street theft.

The emergency contact should have a mobile phone the number of which is known to key staff including all the sub group leaders on the visit.

Managed Use of Cameras

Leaders should consider managing the use of cameras including those on phones to avoid the potential distress of images being circulated.

Duke of Edinburgh Expeditions (DoE)

These expeditions are a valuable experience for young people and supervisors alike. Many expeditions in the UK and abroad are carried out each year.

There are 3 levels of expedition and each has to be done twice- a practice one and an assessed one.

Bronze - Usually low risk area, in normal rural countryside, with 6 hours planned activity and one overnight and in the UK.

Silver - Usually medium risk, rural open countryside, unfamiliar to participants with 7 hours planned activity and two nights camping.

Gold - Usually in wild country, which is unfamiliar to participants (who must be 16+) with 8 hours planned activity and three nights camping. The participants should arrive the day before to acclimatise and get used to the environment and meet the assessor.

All establishments running the Scheme must now be directly licenced.

Responsibility for meeting the conditions of the Duke of Edinburgh's Award Scheme now lies with the Managers of the Award within the establishment and not officers of the LA. The Health, Safety and Wellbeing Team will only scrutinise the Evolve notification in terms of health and safety. We no longer require 'green' forms, detailed route cards and tracings. Simply provide start and finish point for the expedition and intervening camp site(s) in a document and upload into the D of E Forms section. If an expedition is selected to be monitored by the LA, further details may be requested. Risk assessments for the expedition should continue to be completed and uploaded.

Expedition groups must have a minimum of 4 and a maximum of 7 participants. Notifications **MUST** be submitted a month before to comply with both LA and Award conditions. Late submissions can result in an expedition not being 'approved'.

nb "Travel insurance through LCC is only valid once a trip has been approved."

DoE leaders are required to have several additional qualifications that usually include mountain leadership awards and outdoor first aid. LCC has monitored several expeditions all of which have been very successful.



Exchange Visits also known as Home-Stay

Exchange visits have some specific risk assessments available on EVOLVE as well as additional checklists. SEE National Guidance (NG) Evolve web link for latest guidance.

They are an intrinsic part of secondary school education and we fully support their use in schools.

When the visit is notified to the authority only the non home-stay elements are authorised by LCC because there is no way for LCC to effectively control the parts of the visits in the host family's home. The checklist and risk assessments are there for schools to ensure all adequate safeguarding procedures are followed.

Paddling in the sea

Paddling in the sea is a notifiable activity as it involves entering the sea. However, it is an activity frequently undertaken by our children and one which we are keen to see continue.

There is a sample risk assessment on EVOLVE and it is recommended that the control measures detailed on that assessment plus the ratios and additional instructions outlined below are adhered to fully.

There should be a standard box or triangle formation used with either one supervisor on the beach and two in the sea, or two on the beach and two in the sea. The supervisor in the sea demarks the maximum distance into the water and the depth should not exceed the thigh of the child.

If there is a choice, it is recommended that the area of a beach used is covered by a lifeguard.

Swimming in the open sea is not normally permitted.

Cluster activities/ Extended Schools

There are many types of employees in the modern school and they can all lead a visit if they are deemed competent to do so by the EVC and Head teacher.

Schools may be organised into clusters and jointly employ a cluster coordinator (CC). Although all the schools may contribute towards the salary of the CC due to financial regulation there has to be a fund holding school and it is the school that pays the salary of the CC that is considered to be the CC's employer. For this reason it is the fund holding school that must approve any visits that the CC organises. It follows that the employing school's Head authorises the visit.

If the CC is employed by a non school establishment e.g. youth services, or by tender with Children's Service, then it is the contract holding establishment that will approve the visit according to their own systems.

No matter who employs the CC it does not remove the establishment's duty of care towards the pupils on its roll.

CC visits tend to be joint visits and these must be approved by all participating schools.

EVOLVE is recommended for use within all clusters for all visits.

Educational Visits Policy for **Community and Voluntary Controlled Establishments**

1. General Statement of Policy

Establishment

recognises the value of off-site visits to pupils as an enrichment to their studies, and to their personal and social development. Such visits can improve the individual's affiliation to the school and help generate positive relationships with their teachers.

- 1.1. EVOLVE visit notifications will, as a minimum, state
 - the educational purpose of the visit,
 - its aims and objectives and
 - how it conforms to the school's curriculum aims.
- 1.2 EVOLVE will be used to provide assurance that each visit is methodically and suitably planned.
- 1.3 Approval of visits will be outlined within the arrangements section of this policy.
- 1.4 Competencies required for the nominated Visit Leader and supervisors will be clearly defined.
- 1.5 Where the school uses external providers, the visit leader must satisfy themselves that they will deliver quality; have public liability insurance; and meet health & safety standards. This can be done by consulting Evolve; KADDI; and/or the use of E2 & E3 provider forms.
- 1.6 Risk assessments and procedures for managing risks will be in place for all risks that are reasonably foreseeable.
- 1.7 The timescales for the proposal, approval and departure of each visit will be included in the arrangements section of this policy in line with EVOLVE.
- 1.8 Suitable and sufficient information will be provided to parents to enable them to make an informed decision as to whether their child should accompany the trip.
- 1.9 No child will be allowed to embark on any visit without producing a consent form signed by their parent/guardian.
- 1.10 Every trip or visit will be subject to a review on EVOLVE.

2. Organisation

Responsibility for educational visits rests with the Governing Body and Headteacher. The respective roles of each are outlined within the Policy Handbook for Educational Visits [available on Evolve and OEAP National Guidance web site.](#)

2.1 Governing Body

2.1.1 Approval of visits in category 3 will be undertaken by (**Dependent on own establishment Policy – the LA no longer requires Chair of governing Body signature on risk assessments**).

2.1.2 The person named above will be the nominated governor for Educational Visits, as outlined in the OEAP National Guidance for Managing Educational Visits at www.oeapng.info. (A governor 'read only' Evolve account is available.)

2.1.3 The Headteacher's report outlining visits planned and the results of the reviews of visits undertaken will be submitted annually.

2.1.4 An **evaluation** of the visit will be available to view on EVOLVE. **This should be completed within a 28 day window following the visit. After 28 days this option is not available on Evolve.**

2.2 Headteacher

2.2.1 The Headteacher will be responsible for ensuring that Educational Visits are planned in accordance with Leeds City Council's policies and procedures, that the supervisors are competent, **physically and mentally fit and that governor assent has been given if required.**

2.2.2 The Headteacher will authorise all visits via EVOLVE.

2.2.3 The Headteacher will report visits planned and the results of the reviews of visits undertaken to the Governing Body annually.

2.3 Educational Visits Co-ordinator (EVC)

2.3.1 The school's Educational Visits Co-ordinator is:

2.3.2 They will undertake duties as agreed between them and the Headteacher in line with the responsibilities listed in the Policy Handbook for Educational Visits.

2.3.3 The EVC will be trained and fully conversant with the Policy Handbook for Educational Visits; OEAP National Guidance **web site; and have access to the afPE Safe practice in Physical Education, School Sport and Physical Activity. From www.ukcoaching.org/safepractice £44.90 + p&p**

2.4 Visit Leader

2.4.1 The Visit Leader will comply with the requirements outlined in the Policy Handbook for Educational Visits and their role as defined in the OEAP National Guidance.

- 2.4.2 The Visit Leader will ensure that the notification is completed on EVOLVE within time scales and that any activities or events that may place staff or pupils at significant risk are assessed and that safety measures are in place prior to the trip taking place.
- 2.4.3 The Visit Leader will ensure that all parents of children on their trip are provided with all information required and that any questions raised are answered prior to the trip taking place.
- 2.4.4 The Visit Leader named for each visit will have overall responsibility for the visit whilst it is underway.
- 2.4.5 The Visit Leader will liaise with the EVC throughout the planning and preparation of their trip.
- 2.4.6 The Visit Leader will evaluate their trip on EVOLVE.

2.5 Supervisory staff

- 2.5.1 All staff assisting with supervision on any trip will be conversant **with their responsibilities as stated in the Policy Handbook** for Educational Visits. They should feel confident to challenge any unsafe practice observed.
- 2.5.2 All staff will ensure that the requirements of any risk assessments, risk control procedures and safe systems are followed.
- 2.5.3 All staff will ensure that once the trip has started, where any previously unforeseen hazards or risks are identified they are brought to the attention of the Visit Leader.
- 2.5.4 Staff will feedback information to the Visit Leader to enable a full review of the trip to be completed.

3. Arrangements

3.1 Proposals

- 3.1.1 **The Visit Leader will submit a proposal to the Headteacher before starting an Evolve notification. The Evolve notification must be submitted within the following timescale for each category of visit to the EVC. Exceptions are possible but MUST be cleared.**

Category	Latest date for submission to the EVC
1 - regular curriculum	1 week (recommended)
2 – one offs	2 weeks (recommended)
3 - overnight, overseas, adventurous	6 weeks (mandatory) LA needs 4 weeks

- 3.1.2 The EVOLVE notification must be completed for all category 3 visits.
- 3.1.3 Parents should be given sufficient information to enable them to make an informed decision as to whether their child should participate in the visit **taking place outside school hours**. They must sign the relevant consent form (s), and provide emergency contact number(s) and all relevant medical details.
- 3.1.4 Where coach or minibus travel is to be used it must be in accordance with LCC regulations.

3.2 Notification

3.2.1 Notification will be made using EVOLVE within the time scales in 3.1.1.

3.2.2 The Visit Leader is responsible for planning the visit **and completing the Evolve notification.**

3.2.3 The Headteacher will ensure that the Visit Leader carries out this task.

3.3 Undertaking the visit

3.3.1 Once the notification has received approval the visit will commence in accordance with the itinerary and activities planned. Any deviation from the itinerary or planned activities must be considered by the Visit Leader and a dynamic risk assessment made prior to the alteration taking place.

3.3.2 A record must be kept of all such instances for evaluation and review purposes.

3.3.3 Any accidents or near misses that occur during a visit will be reported to Leeds City Council using the forms CF50 and/or CF50a upon the return of the group to school.

3.3.4 Any accidents that result in a pupil or member of staff having to go to hospital must be telephoned to the school contact immediately. Upon receipt of any such calls the school contact will immediately inform the Health and Safety team in Leeds City Council.

3.4 Monitoring

3.4.1 The school will monitor the implementation of this policy by ensuring that the documentation required has been produced to a satisfactory standard.

3.4.2 On occasions the EVC, Headteacher, Senior Manager or member of the Governing Body will accompany a group.

3.4.3 The school may also request Leeds City Council Health and Safety Team to undertake a monitoring visit of a planned trip **or conduct an audit of their educational visit process.** This will be used for the school's own monitoring purposes.

3.5 Evaluation and Review

3.5.1 The evaluation will be completed on EVOLVE.

3.5.2 The Visit Leader will report any significant issues with the visit to the Health, Safety and Wellbeing Team.

3.5.3 Every visit will be reviewed by the Visit Leader.

3.5.4 The results of the evaluation and review process will be available to the Headteacher via EVOLVE.

3.5.5 The Headteacher's report to the Governing Body will include details of the evaluations and reviews for visits undertaken.

Signed Chair of Governors:

Date:

Signed Headteacher:

Date:

Sample Consent for Sports Fixtures.

Child's name _____

Sports team _____

For the academic year _____

Dear Parent

Your child has been selected to represent the school on the above team. As such, s/he will be given opportunities throughout the year to participate in matches/tournaments/events and sometimes these might occur at short notice, e.g. if a team member drops out, etc.

In order for us to keep you informed and to ensure the safeguarding of your child please read this consent form carefully and then sign and return it to the school. Please note that without this consent form we will be unable to allow your child to participate in the sports fixtures. Please direct any enquiries about this form to the head of PE at the school.

1. Students are the responsibility of their parent/guardian once they have left the school premises after the fixture. Unless you tell us otherwise we will allow your child to leave the premises after the fixture to make their way home.
2. Parents/guardians should be aware that only the group leader is usually present on the minibus for an away fixture and that this person is commonly also the driver.
3. For fixtures away from school, involving transportation, students are expected to remain seated with their seat belts fastened and to behave sensibly at all times.
4. With written consent, on page XX of the planner, it may be possible to drop your son/daughter off at a convenient point nearer to their home on the homeward journey. However, parents/guardians should be aware that from this point onwards they must accept full responsibility for their son/daughter's well-being.
5. Parents/guardians must ensure that we have up to date contact details.
6. In the event of a serious injury, requiring hospital treatment, parents will be contacted as soon as possible by the group leader and given all the relevant facts. The priority will always be to get treatment for the child.
7. For minor injuries, first aid treatment will be administered by an appropriate person and the student will be brought back to school with the team.

8. Dates for fixtures will be given to pupils by their coach and/or displayed on the extra curricular notice board in the PE corridor. It is the responsibility of the student to make sure these dates are written in the planner in order that you too are aware of them.
9. I know how frustrating it can be for parents when matches have been cancelled at the last minute because of weather conditions or staffing problems, and I apologise for any inconvenience in advance. When matches are cancelled we do try to rearrange them as soon as possible and students are made aware of the dates at training sessions or from their captains.
10. We realise that for many students being part of a team is an important aspect of their school life. It is highly likely that students will, at some point, have to miss their normal timetabled lessons to participate in some sporting events. For this reason it is important that the student understands that his/her behaviour in lessons can influence their place on the team. They should be aware that failure to regularly do homework diligently may result in a temporary suspension from the team or that the class tutor prevents the student from missing their lesson.

Yours faithfully

Mrs E X Ample
Curriculum Leader for Physical Education

I am the parent/guardian of _____ in class _____ .

I have read this blanket consent form carefully and understand that I am giving my consent for my child to participate in the specified sports team.

I understand the procedures detailed above and will regularly check my child's planner for details of fixtures dates and times.

Signed

Print

Date

Health and Safety Bulletin

2/2011

Leeds City Council Insurance cover in relation to school trips and visits

Introduction

We have received information from Zurich Insurance; the City Council insurance providers; in relation to the level / type of cover provided to schools for trips and visits. The information is in relation to staff and pupils attending trips and visits who have pre existing medical conditions. Below are details of the information Zurich have provided :-

“In line with many Travel insurance policies, Zurich has an exclusion in its Business Travel and School Journey policies referring to “travel against medical advice”, usually stating the following:

5. Travelling Against Medical Advice

excluding any expenses incurred if an Insured Person is travelling or intending to travel against the advice of a Medical Practitioner

We strongly recommend that if there is any doubt over a current or recent medical condition that the traveller visits their doctor to make sure they are fit to travel and are not invalidating their cover. This will help to avoid potential difficulties should the need to claim arise later for cancellation, or sickness happening during the trip.

The person insured should get a written statement from their GP or other medical practitioner at most 7 days before the trip starts stating that they are fit to travel having regard to (a) the condition itself and (b) the following features of the trip :

- destination; activities; duration ; methods of travel*

The person insured should tell the medical professional that the required statement is for specific insurance purposes and that it may be relied upon to substantiate the validity of a Medical Expenses claim should it later need to be made.

Please note that for longer trips (usually beyond 6 months) different considerations will usually apply, so please contact us should such a trip be planned.”

Schools should obtain as much information as possible in relation to pre existing medical conditions of proposed travellers and if needs be obtain a “fit to travel” note from the travellers GP / medical adviser.

Bulletins available on Evolve

- 4 2015 Educational Visits – notified to all EVCs on Evolve September 2015
- 4 2016 Farm Visits
- 5 2016 Educational Visits – notified to all EVCs on Evolve September 2016 & School Governors via the Governors Unit.
- 4 2017 Educational Visits - notified to all EVCs on Evolve September 2017; Heads & School Governors via the Governors Unit.

Visits in category 1

Definition	

	<p>Curriculum based activities that take place on a regular basis, occur largely within working hours and are not classed as Category 3 visits.</p> <p>These will be lessons, activities and experiences that parents would consider being a part of the school day and will include visits to swimming pools, playing fields, sports halls, field study sites, split site lessons, work placements and visits to other schools.</p> <p>Sporting activities after the end of normal school hours will be included where such an event is a natural extension of the school day and it is unreasonable to expect parental consent to be sought for each event, for example a regular school sports club.</p>
EVOLVE	These visits should be planned on EVOLVE.
School/ Centre Approval	By the Head of School/Centre– this may be implicit within the school timetable.
LA Approval	These do not need LA approval. Schools can request that a visit form is checked by adding a note to that effect. Some Category 1 visits will be monitored by Leeds City Council to fulfil the LA’s statutory monitoring role.
Parental Consent	Written parental consent may be provided on an annual or termly basis for certain types of visit, where it is deemed prudent to seek such consent. Some schools may wish to seek parental consent for all trips, to ensure that home contact numbers are up to date or because of the special educational or medical needs of the pupils involved. Visits taking place during school hours do not require consent. You own establishment educational visits policy may require parental permission though.
Risk Assessments	<p>Activities will need to be assessed – e.g. crossing the road, maintaining suitable levels of supervision etc. These should be undertaken prior to the visit taking place.</p> <p>There are sample risk assessments for a range of activities on EVOLVE.</p>

Visits in category 2

Definition	<p>Day visits, school trips and activities that parents would not regard as a part of the normal school day and which are not classed as Category 3 visits.</p> <p>Such activities will extend beyond normal working hours but do not involve any overnight stay. They may include visits to a museum, theatre, sporting events elsewhere in the country – e.g. London, Scotland, that can be reached and returned within the same day avoiding the period between 2am and 6am..</p>
EVOLVE	<p>These visits should be planned through EVOLVE to allow consistency of standards in the school and throughout Leeds City Council.</p>
School/Centre Approval	Head of School/Centre
LA Approval	<p>These do not need LA approval. Schools can request that a visit form is checked by adding a note to that effect. Some Category 2 visits will be monitored by Leeds City Council to fulfil the LA's statutory monitoring role.</p>
Parental Consent	<p>Parents must be informed of the nature of any such visit taking place outside school hours and consent will be required in writing or by secure eConsent.</p>
Risk Assessments	<p>Activities will need to be assessed – e.g. crossing the road, maintaining suitable levels of supervision, use of road transport, etc.</p> <p>Risk assessments should be undertaken prior to a Category 2 visit being undertaken to enable the EVC to decide whether the visit can be approved or not.</p>

Visits in Category 3

Definition	<p>Visits which are</p> <ul style="list-style-type: none"> • Overnight, i.e. residential or active between 2am and 6am • Overseas, i.e. outside of the borders of the UK • Adventurous, i.e. any activity requiring an AALA license or a national qualification to undertake, e.g. canoeing, kayaking, rock climbing, archery, etc.
EVOLVE	All visits in this category MUST be notified to the LA using EVOLVE
School Approval	Head of School/Centre

<p>LA Approval</p>	<p>The notification should be submitted to the HSWT no later than 4 weeks prior to the visit taking place.</p> <p>Where no further information is required approval will be given via EVOLVE for the visit to go ahead.</p> <p>Where further information is required or there are other issues to address, approval will only be given once the responses have been received.</p>
<p>Parental Consent</p>	<p>Parental consent must be given for any person in full time education. Consent will be required in writing or by secure eConsent.</p>
<p>Risk Assessments</p>	<p>Risk assessments should be completed for all aspects of the visit, including methods for supervising whilst undertaking activities, means of transport to and from the location, use of the accommodation etc.</p>

The Approval Process

For category 1 and 2 visits.

1. The EVOLVE notification is completed by the Visit Leader.
2. Risk Assessment and supporting information is attached.
3. The notification is submitted to the EVC.
4. The EVC reviews the information on the notification and, if it is appropriately planned in accordance to the standards outlined in this document, submits the notification to the HT/HOC/HOS.
5. The HT/HOC/HOS reviews the form and authorises the visit if it meets the standards outlined in this document.

For category 3 visits, the HT/HOC/HOS should have the consent of their nominated governor/trustee to authorise the visit.

6. The notification is automatically sent to the HSWT for approval.



Roles and Responsibilities- The LA

The Local Authority (Leeds City Council) has a responsibility to ensure that the following is provided:

- Written guidelines for schools, which include advice on risk assessment, competencies, training and school policies.
- A means of assessing proposals for visits in Category 3 (EVOLVE) and advice regarding visits in other categories.
- Emergency telephone contact for the duration of the visit, where necessary.
- Access is available to specified staff for advice.
- Appropriate insurance cover (Zurich) is maintained.
- Procedures to monitor and review safety during off-site visits are in place.

Leeds City Council' Health, Safety and Wellbeing Team is responsible for:

- Managing the EVOLVE system
- Notification and approval of school visits.
- Maintenance of the Handbook for Educational Visits.
- The issue of advice and instruction for visits.
- Dissemination of national guidance for school visits.
- Monitoring and provision of advice on the health and safety aspects of training and Continuous Professional Development.
- Monitoring school visits.
- Delivering EVC and Visit Leader Awareness Training.

Roles and Responsibilities- the Governing Body – SEE ALSO page 46

The Governing Body should ensure that the school / establishment has a policy relating to Educational Visits. There is a sample policy in this handbook. Exemplars are available from HSWT.

The Governing Body should satisfy itself that suitable and sufficient risk assessments have been carried out and that appropriate safety measures are in place, including appropriate levels of supervision and appropriate levels of competency, before approving any visits. These details have to be entered on EVOLVE and therefore the nominated governor can read the information relating to the visit on EVOLVE to satisfy themselves that there are sufficient safeguards in place.

Training and support can be provided to the governing body by the HSW team and by the Governor Support Service.

The governing body may be informed in writing by the HSW team if a notifiable visit goes without approval.

Category 1 and 2 visits

The Governing Body should require the Headteacher to report Category 1 and 2 visits and activities undertaken at a frequency agreed by the Governing Body.

Category 3 visits

The Governing Body may be required to approve Category 3 depending on own school policy. The LA no longer requires governor approval. Governors should ensure the LA is notified of these visits within the time scales in 3.1.1. On EVOLVE, a nominated governor (this does not have to be the chair) can add a note to the visit form to give approval.

Roles and Responsibilities- The EVC

The EVC is the person responsible for the organisation of visits in an establishment. It is highly recommended that the EVC is not the headteacher/head of service but has the necessary experience to undertake this role. Training for this role is mandatory.

With the introduction of EVOLVE, it is expected that the administrative burden will be reduced for EVCs and all staff involved in planning a visit.

EVOLVE automatically undertakes a significant proportion of the checks that were manually assessed by the EVC previously, including ratios, transport arrangements, etc. A notification can only be submitted to the EVC by the Visit Leader once all the sections are complete and correct and therefore the assessment of the notification should be a much simpler and shorter process.

- To give advice and guidance on the organisation of educational visits and the use of EVOLVE.
- To manage EVOLVE for the establishment including managing users, uploading documents and approving notifications.
- To provide or arrange training for educational visits where required.
- To monitor a selection of visits for internal monitoring.
- To act as a liaison between the HSW team and the establishment.
- To be conversant with both the OEAP National Guidance and this policy handbook.

The above fulfils the recent guidance for the Department for Education - Guidance - Health and safety on educational visits Published 26 November 2018
<https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits>

Roles and Responsibilities- The Head of School/Centre/Service

The Head of School/Centre/Service is responsible for ensuring that:

- The establishment's policy for visits is implemented.
- Guidance from the LA, as detailed in this handbook and OEAP National Guidance, is followed and that the arrangements for any visit are thoroughly scrutinised prior to approval being sought or given.
- Time scales are adhered to.

Roles and Responsibilities- The Visit Leader

One person per visit should be identified as having overall responsibility for planning the visit and the welfare of the group. This person will be known as the Visit Leader. They must have the necessary experience and competencies to lead the visit. Training for this role is available and recommended.

- The establishment's policy for visits is implemented.

- Guidance from the LA, as detailed in this handbook and OEAP National Guidance, is followed and that the arrangements for any visit are thoroughly scrutinised prior to approval being sought or given.
- Time scales are adhered to.

Roles and Responsibilities- Teachers, Youth Leaders and other adult helpers

All other adult helpers, whether teachers, youth leaders, non-teaching staff or volunteers will act “*in loco parentis*” and will also have a duty of care towards anyone they are supervising. **Their duty of care will require them to do everything a ‘prudent parent’ would do to reasonably ensure the safety and welfare of the young persons.** Visit leader training is available for all school staff.

They must follow the Visit Leader’s instructions at all times. If, however, they feel that risks to participants and colleagues are not acceptable they must inform the Visit Leader of their concerns. If they believe that their concerns are justified but are not being considered they must report the matter to the school immediately. Such instances may include where the conditions outlined within a risk assessment have changed significantly enough for the assessment to become invalid, requiring a new assessment to be carried out, but where the Visit Leader, for whatever reason, chooses not to re-assess the risk.

Non-employee adults acting as supervisors must not be left in sole charge of the participants.

Participant Responsibilities

Participants must:

- Follow the instructions of the Visit Leader and other supervisors at all times during a visit.
- Not take unnecessary risks or undertake activities that have not been assessed or are not included within the visit programme.
- Inform the Visit Leader or other supervisors of anything they feel might hurt themselves or others in the group.
- When abroad, be sensitive to local codes and customs, and should be informed of these prior to the visit.

Parent/ Carer Responsibilities

Parents must be informed of the rules and procedures to be followed during the trip and should ensure that their children are aware of and will follow them.

Parents will need to:

- Provide emergency contact details to the school/service.
- Sign the parental consent form **if the visit is taking place outside school hours.**
- Provide details regarding their child’s emotional, psychological and physical health that may be relevant to the visit.

Supporting pupils at school with medical conditions

Statutory guidance for governing bodies of maintained schools and proprietors of academies in England

April 2014

Day trips, residential visits and sporting activities

40. Governing bodies should ensure that their arrangements are clear and unambiguous about the need to support actively pupils with medical conditions to participate in school trips and visits, or in sporting activities, and not prevent them from doing so. Teachers should be aware of how a child's medical condition will impact on their participation, but there should be enough flexibility for all children to participate according to their own abilities and with any reasonable adjustments. Schools should make arrangements for the inclusion of pupils in such activities with any adjustments as required unless evidence from a clinician such as a GP states that this is not possible.

41. Schools should consider what reasonable adjustments they might make to enable children with medical needs to participate fully and safely on visits. It is best practice to carry out a risk assessment so that planning arrangements take account of any steps needed to ensure that pupils with medical conditions are included. This will require consultation with parents and pupils and advice from the relevant healthcare professional to ensure that pupils can participate safely. Please also see Health and Safety Executive (HSE) guidance on school trips.

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- asthma inhalers – once regulations are changed, schools will be able to hold asthma inhalers for emergency use. This is entirely voluntary, and the Department of Health is producing a protocol which will provide further information.

Unacceptable practice

43. Governing bodies should ensure that the school's policy is explicit about what practice is not acceptable. Although school staff should use their discretion and judge each case on its merits with reference to the child's individual healthcare plan, it is not generally acceptable practice to:

- prevent children from participating, or create unnecessary barriers to children participating in any aspect of school life, including school trips, eg by requiring parents to accompany the child.

PG505

Supporting Pupils with Medical Conditions in School V4 is now available in schools.

See section 10.1 School Trips below page 49.

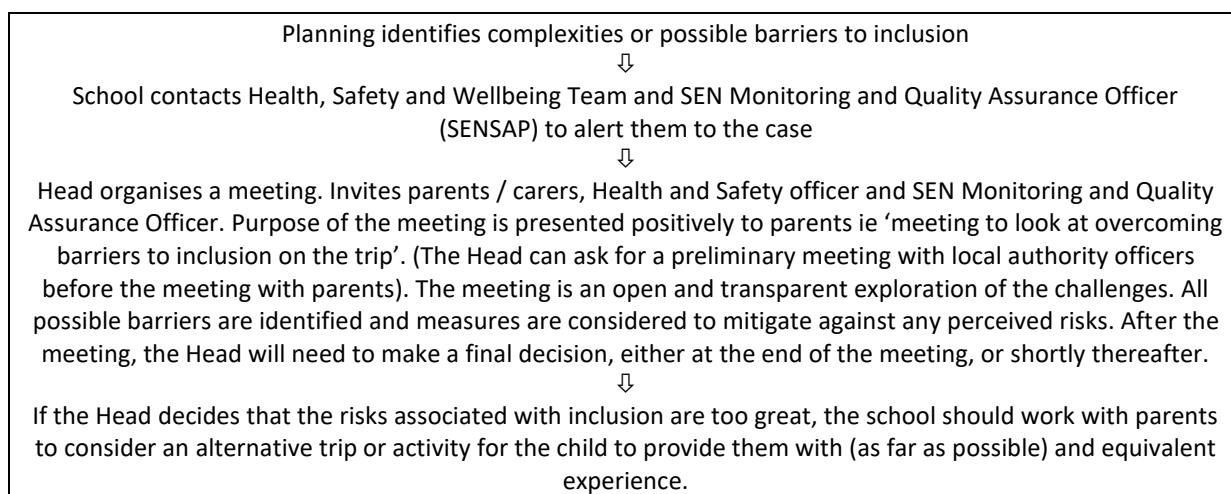
The inclusion of children with special educational needs and disabilities (SEND) on trips and other out-of-school activities.

1. The Anticipatory Duty

There is an 'anticipatory duty' under the Equality Act 2010 which necessitates that schools '*should not wait until a disabled person wants to use its services, but must think in advance (and on an ongoing basis) about what disabled people might reasonably need*'. In relation to trips and other activities, this means that all considerations around accessibility are made and addressed at the planning stage and in good time for the necessary arrangements to be made.

2. Complex cases

In the vast majority of cases, schools will not need to make great efforts to include disabled children in making the necessary arrangements. In the case of children with complex needs, or concerns that a trip may not be accessible to them, it is important to follow a rigorous, collaborative process:



Parents are more likely to accept a decision (even if it not the decision they were hoping for) if they have been party to genuine and strenuous efforts for overcome barriers. Indeed, including parents in such meetings is also a good way of demonstrating how seriously the school takes its responsibility to disabled children.

3. Valid reasons for non-inclusion

There are certain circumstances wherein Head teachers may conclude that it will not be possible to include a child on a trip. Eg:

- Tensions between the duty to include a child under the Equality Act, and other statutory duties such as the duty to ensure their safety, or the safety of others (in terms of Health and Safety or Safeguarding)
- Prohibitive costs (see note 7 below)

It is important that Heads do not place children with disabilities (or other pupils, staff or members of the public) at unacceptable risk in allowing them to take part in a trip or activity. Whilst the duty to work on addressing barriers is compelling, it is not as compelling as the duty to ensure safety.

4. The risk assessment

Head teachers should be guided in their decision making by the risk assessment which identifies all possible barriers and includes measures to mitigate against them. It is not necessary for all risks to be entirely removed for the child to be included, but the risks must be within an acceptable range.

It is crucial that the risk assessment process is rigorous. In the event of a formal (even legal) challenge from parents under the Equality Act, the rigour of the risk assessment will be closely scrutinised. For this reason, Head teachers are advised to involve Health, Safety and Wellbeing professionals in the process, to act as

critical friends. Decisions relating to the exclusion of disabled children from trips should never be made 'behind closed doors' without consultation as this is unlikely to be considered sufficiently rigorous.

5. The definition of 'disability'

You are disabled under the Equality Act 2010 if you have 'a physical or mental impairment that has a 'substantial' and 'long-term' (over 12 months) negative effect on your ability to do normal daily activities'.

Because this definition is so broad, we would advise against neglecting to follow these recommendations on the basis that you do not consider the child to be disabled. It is not necessary to have a formal diagnosis to be considered disabled under the Act, and the definition includes mental health difficulties.

6. Parental support

In some cases, schools may request that parents / carers accompany their disabled children on a trip. It is acceptable to make such an offer / request, but it is important that this is not seen as a condition of the child's inclusion on the trip. In the event that the parent / carer is unable to offer their time, the school will need to make other arrangements through their staffing resource.

7. Prohibitive costs

In some circumstances, Head teachers may deem that the costs associated with including a disabled child on a trip are prohibitive. The Equality Act recognises that some costs may be 'unreasonable', but ultimately, the reasonableness of any costs are calculated in terms of the school's overall budget. It should also be noted that schools are, under the 'anticipatory duty' required to retain contingency funding in the event that costs associated with inclusion arising during the financial year. Heads should only conclude that costs are prohibitive if they are confident of being able to demonstrate why this is the case.

Schools should not ask parents or carers of disabled children to contribute to the additional costs associated with the inclusion of their child. Any additional costs must be distributed amongst all participants in the trip, or absorbed by the school.

8. The final decision

The final decision on whether or not to include a disabled child on a trip rests with the Head, and should not be delegated to a less senior member of staff. The Health and Safety and SEN professionals called in to support the school with the process may be able to provide opinions on certain aspects of the case (the rigour of the risk assessment, the appropriateness of support arrangements etc), but will not be able to provide the Head with guidance on the decision he / she should make. It is important to understand that there is often no 'right or wrong' answer in such cases, and different people calculate risks in different ways. It is important that the process leading up to the decision has been rigorous and genuine, and the Head can demonstrate that the decision has been made in the child's best interests. It should be noted that legal responsibility under the Equality Act 2010 ultimately rests with the governing body.

9. Equivalent experience

In the event that the Head has deemed the risks associated with the disabled child's inclusion unacceptable, the school should either provide the child with an alternative experience on the same trip or consider what can be done to provide the child with a separate activity that is, as far as possible, equivalent to the trip or activity they have missed. This 'equivalence' should be considered in terms of both the educational and experiential aspects of the trip and should be a shared experience (ie involving friends and peers). The Head should involve the child's parents in the decision making and planning process around this separate activity. Any reasonable costs associated with this should be borne by the school.

10. Behaviour

There are particular challenges associated with children whose needs manifest themselves in potentially harmful, or aggressive behaviour. Heads can encounter requests from parents (of other children), pupils or staff not to include a child whose behaviour might affect the enjoyment of the other participants. Whilst such concerns are understandable, they should not be considered factors in the final decision making process, which should be focussed solely on the objective risk assessment and the conclusions drawn from it.

PG505

Supporting Pupils with Medical Conditions in School V4 is now available in schools.

10.1 School trips

CYPs with medical needs should be encouraged to participate in school trips as long as the safety of the CYP, other CYPs and/or staff is not placed at significant risk.

It may be necessary for a school to take additional measures for outside visits. This may include:

- additional appropriately trained staff;
- adaptations for bus or coach seats and entrances;
- provision of secure cool-bags to store medicine;
- provision of properly labelled single dose sets.

When planning trips and visits which will include a CYP with medical needs, all persons supervising the trip should be made aware of the CYP's medical needs and any emergency procedures that may be needed.

The location to be visited should be made aware that persons with medical needs are included in the party. Where it is unlikely that any difficulties will occur there is no need to inform the place to be visited.

If there is any doubt regarding a school trip the school should discuss the trip with the PLG and also, if necessary, seek medical advice.

CYP – Child Young Person

PLG - Parent or Legal Guardian.