

Section A

Wrexham Borough Council

Planning and approval procedures for Educational Visits

This document sets out the Local Education Authority planning and approval procedures for Educational visits. The document has been divided into 3 key sections.

Section A – Policy, Guidance and Emergency Procedures

Section B – Planning and approval procedures

Section C- Risk Management

Anyone organising an off-site visit should also refer to and follow the relevant guidance (relating to the nature of the visit being planned) as set out in the Outdoor Education Advisers' Panel (OEAP) National Guidance for Educational Visits www.oeapng.info

Revision history

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Author	Arwel Elias, Mike Rosser
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Summary of Changes	
The review will be undertaken by:	Arwel Elias / Mike Rosser
This document is available in Welsh	

Darland High School

Educational visits policy

Updated: Jan 2022

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1. Summary of Policy

This document sets out the procedures by which Local Authority and its educational establishments meet the standards set out in the OEAP *National Guidance for Educational Visits*, recognised as *best practice* by the Welsh Government

Darland High School follows the LA procedures for educational visit planning, approval and monitoring by using the EVOLVE on line visit planning and approval system for visits run by school/establishment staff or volunteers.

1. Staff planning an educational visit must ensure that they follow the procedures set out in this policy.
2. Staff must also refer to and follow the relevant guidance (relating to the nature of the visit being planned) as set out in the Outdoor Education Advisers' Panel (OEAP) National Guidance for Educational Visits www.oeapng.info
3. Staff must also refer to their Safeguarding policy, and ensure that they have meet their duties and exercise their functions in a way that takes into account the need to safeguard and promote the welfare of children.

This policy is reviewed every 3 years or following any accident / incident on an educational visit.

2. Foreword

By Head/Chair of Governors in support of off site visits

The governors and staff believe that educational visits and off site activities are an important aspect of the educational provision at the school. Educational visits allow pupils to develop and apply skills learned in the classroom. They are important in widening aspirations and broadening the opportunities and experiences of our pupils. Pupils develop socially when engaged in activities under the direction of our staff, but outside the confines of the classroom.

As a result of our belief in the importance of school visits, the school has long had a proud tradition of organising many trips and visits throughout the year, many of which involve a residential element and take place overseas.

When visits are organised and carried out, the safety of participating pupils and supervising personnel is paramount. Whilst the school has a very good track record in this area, the purpose of this policy is to refine, demark and codify the protocols and practices already in use, particularly with regard to assessing risk and establishing consent.

3. Roles and Responsibilities

Visit Leader

1. The designated person responsible for the Visit and who will have overall responsibility for the safety and conduct of participants and the Visit Leadership Team.
2. Visit Leaders will need to obtain the Head/EVC's approval for the visit according to school/centre policy;
3. They will need to obtain LA leader approval if leading any adventurous/ demanding environments visit for which LA approval is required (Please see section on LA Approval)

Key Requirements

- Must be competent to lead, confident and accountable
- Visit leader should have the ability to lead to the level demanded by the visit, and has sufficient relevant experience and knowledge of the activities, the group, and the environments they will operate in.
- Undertake and complete the planning and preparation of the visit, including the briefing of group members and parents/carers;
- Ensure the ratio of staff to young people is appropriate for the environment/activities and the needs of the group;
- Identify significant hazards and safety measures to reduce risk to a tolerable level, and make known to parents, EVC and Head and others the level of residual risk that needs to be managed;
- Have enough information about the young people to assess their suitability for the visit or be satisfied that their suitability has been assessed and confirmed;
- Ensure that all accompanying leaders are familiar with these procedures;
- Make appropriate and adequate preparations for emergencies in conjunction with the EVC
- Carry out dynamic risk management while the visit takes place and consider stopping the visit if the risk to the health or safety of the young people is unacceptable and have in place procedures/alternative plans for such an eventuality

Educational Visit Coordinator

A key element of these procedures is that each school/establishment has a competent **Educational Visit Coordinator (EVC) who has completed the county EVC training course**. Due to the nature of the role the EVC must be an experienced member of staff:

1. **who is part of, or able to influence, the Senior Management Team;**
2. **with sufficient authority to make a judgement call about the competence of any other staff member to lead an off-site visit and to approve or decline visits planned by any staff member;**
3. **The EVC is the routine contact for dialogue with the LA Educational Visits Adviser.**

Key Requirements of the EVC:

- Ensure that all visits are planned and approved in accordance with this policy;
- Support the Head and Governors with approval decisions;
- Assign competent people to lead or otherwise supervise a visit;
- Carry out occasional monitoring of visit leaders to identify further training needs;
- Work with the visit leader to provide parents/carers with information about the visit and obtain the necessary consent from parent/carers;
- Ensure emergency arrangements and contacts are in place for each visit;
- Keep records of individual visits including what worked well, what didn't and any accident/incident reports

Head

1. Heads/Managers should have an establishment visits policy and procedures that conform to and follow the requirements and recommendations of their employer's guidance and ensure that arrangements are in place for the educational objectives of all visit to be inclusive.
2. They will need to ensure that arrangements are in place for the governing body to be made aware of certain visits and ensure that visit arrangements and outcomes are evaluated to inform future visits and staff training needs;
3. Approve visit for **all** educational visit prior to visit date as set out in the table below

Key Requirements of the Head

- Be aware that the appointment of an Educational Visits Coordinator (EVC) is critical to the implementation of this guidance and should be allowed sufficient time to fulfil the role, including attendance at OEAP-approved training. Heads/Managers may choose to designate themselves as EVC.
- Ensure that proper and effective support structures in the event of emergency or critical incident including means of contacting the relevant officers LA Education Officer (Schools) or Principal Youth Officer (Youth Service) or emergency planning team and arrange for the reporting of accidents and incidents as required. Records of these should be reviewed regularly, and this information used to inform future visits
- Where needed, have access to expert advice from their Education Visit adviser.
- **The Head (Schools) or Head of establishment (non-schools) has responsibility to ensure that any changes to their EVC is notified to the Education Visit Advisor so that he or she can take steps to train their replacement as soon as practicable.**

Governors

1. Members of the Governing Body should view their main role as being **'to enable and ensure'** that staff are fully aware of the employer's responsibilities under Health and Safety Law.
2. That the establishment have formally adopted the Education Visit Policy and that they have a robust system to support the implementation of the policy.

Key Requirements

- They challenge in order to be clear about how outdoor learning and visits lead to a wide range of outcomes for children and young people and contribute towards establishment effectiveness.
- They ensure that the Education Visit policy and procedures are fully implemented (including emergency procedures – and it supports the principles of inclusion)
- The involvement in Board/Governing Body in the visit approval process is clear and approval and notification procedures operate effectively
- Ensure there is a trained EVC who meets the employer's requirements, with a sufficient time allowance to fulfil the role and training to support the planning and delivery of visits and outdoor learning.
- There are monitoring procedures in place, activity is evaluated, good practice is shared and any issues are followed up to comply with statutory and employer's requirements.

Education Visit Advisor

1. The Educational Visits Advisory Service fulfils the following statutory Council functions to support the LA to meet its legal responsibilities and powers with regard to off-site and educational visits delivered to young people by its employees.
2. Provide expert advice on safety and quality of educational visits and on risk management in the context of all educational visits,
3. On behalf of the Local Authority approve (or disallow) visits for which LA approval is required these including adventure activities, expeditions and overseas visits.
4. Monitor standards of Health and Safety management in off-site activity and educational visits, including observing activities and visits
5. Ensure that adequate and appropriate training is available and taken up by relevant employees.

Key Requirement

- Ensure that EVCs, visit leaders, other school staff and other adults involved in educational visits are assessed as competent in their specific tasks.
- Ensure that LA guidance on Health and Safety of pupils on educational visits is provided to all LA educational establishments and is kept up to date with current best practice, including lessons learned from incidents in Wales and beyond.
- Fulfil the LA's approval role for specified categories of educational visits.
- Inform the LA and Board of Governors of noncompliance or visit that have not been approved by the LA.
- Verify the competence of LA employees who wish to lead visits in any of the areas or activities for which LA approval is required
- Offer relevant training, advice and support to all educational establishments on the Health and Safety of pupils on educational visits and other matters relating to safety and quality in Outdoor Education.

Contact Details for Local Authority

Local Authority (LA) leader approval, LA approval or notification for visits, EVC training and general advice about off site visits and adventure activities

Mike Rosser

Education Visits Advisor
Nant BH Outdoor Education Centre
Llanrwst
Conwy
LL27 0JB
(01492) 643083
mike.rosser@conwy.gov.uk

Accidents, incidents and general advice relating to Health and Safety

Wrexham CBC Health and Safety Officer/Health, Safety and Welfare Advisor (Economy, Community and Education)

Nigel Lawrence
E-mail: nigel.lawrence@wrexham.gov.uk

Phone: 01978 292565

4. Approval and notification requirements for visits

All visits must be approved as set out in the table below. LA approval decision for visits will be given via the Evolve system. Visit **MUST NOT PROCEED UNTIL** approval has been given. Visit submitted outside of the timescale set out in the table below run the risk of not being approved. **Details on specific Procedures for the types of Visit and relevant forms can be found on Evolve under Policy / Procedures or in the Forms section on the Home Page.**

Visit type	Planning and approval required
Routine visits (as defined in Educational visits procedures document)	Planning Visit planned on routine visit planning form Approval By the Head before the visit takes place (Heads may give blanket approval for a member of staff to lead routine visits)
<ul style="list-style-type: none"> Non-routine visits Overnight visits 	Planning Visit planned using the EVOLVE system by Visit Leader / Submitted by EVC Approval <ul style="list-style-type: none"> By the Head on the EVOLVE system before the visit takes place using their PIN number Visits that have not been approved by the Head on the EVOLVE system MUST NOT TAKE PLACE.
A visit involving any of the following elements: <ul style="list-style-type: none"> Demanding environments (as defined in table 3 in the Educational visits procedures document) Adventure activities (as defined in table 4 in the Educational visits procedures document) 	Planning Visit planned using the EVOLVE system / Submitted by EVC Approval <ul style="list-style-type: none"> Approved by the Head on the EVOLVE system using their PIN number at least 14 days before visit start date. LA approval required –EVOLVE automatically applies for this after the Head approves the visit. Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE
Overseas visits and expeditions organised through an independent provider (<i>i.e. skiing, sports tours, cultural/ foreign language visits and expeditions involving trekking or other adventure activities</i>)	Planning Initial approval before booking using the Outline Approval for Overseas Visits form (available on EVOLVE forms section) submitted to the LA Following initial approval granted, Visit must be planned by the Visit Leader using the EVOLVE system / Submitted by the EVC Approval LA Approval is in two stages: <ul style="list-style-type: none"> Initial approval for the planning phase will be given at least 3 months prior to visit. Head approval on the EVOLVE system at least 42 days before the visit LA final Approval at least 28 days before the visit – Evolve automatically applies for this after the Head approves the visit using their pin. Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE.
Duke of Edinburgh Award expedition	Planning Visit planned using the EVOLVE system Approval <ul style="list-style-type: none"> Approved by the Head on the EVOLVE system using their PIN number.at least 14days before visit start date. LA approval required –EVOLVE automatically applies for this after the Head approves the visit Visits that have not been approved by the LA on the EVOLVE system MUST NOT TAKE PLACE.

5. Summary of Procedures

Parent / carer consent

Consent is required for all offsite and educational visits. Anyone organising an off-site visit should:

1. **Provide parents with sufficient information to make an informed decision about the participation of their child. Such information may be given in a variety of ways, as the information needed by parents will depend on the nature and complexity of the visit**
 - For routine visits **those listed on your Routine Visit Consent Form**, blanket consent is obtained.
 - For non-routine visits i.e. **Overnight/adventurous etc.** consent is obtained for each visit (or series of repeated visits) using a **Non-routine Visit Parental Consent Form or Adventure Activities Consent form**. An example of a non-routine visit parental consent form can be obtained from the EVOLVE system by clicking on resources and then 'forms'
 - With appropriate security measures in place, parents can give consent electronically - e.g. by email, text, website or apps. Online systems that provide the option for visit-specific e-consent should have the facility for parents to confirm that they have been fully informed, and when and by whom the consent was given. Systems that use a hyperlink or attachment facility enable the direct connection between consent and information about the visit.
 - Where it is not possible for parents to update information electronically, as part of the consent process, it would be sensible to include a statement informing the school of any changes to my child's medical condition or individual needs (including any emotional wellbeing or mental health issues which may affect their participation in the visit), agreement to medical treatment and any changes to emergency contact numbers
 - If parents/careers withhold their consent the young person must not be taken on the visit but the curricular aims of the visit should be delivered to the young person in some other way wherever possible. If the parents/careers give a conditional consent the Head will need to consider whether the young person may be taken on the visit or not.

Inclusion

The overarching principle is that all pupils should be included in all education activities and experiences. The law requires that 'reasonable adjustments' are to be made to include pupils with additional support needs. This might include amendments to the programme, additional staffing etc. The Health and Safety of all pupils and staff on visits must also be considered.

When a visit or activity is being planned, all reasonably practicable measures must be taken to include all young people. Every reasonable effort should be made to find a venue and activities that are both suitable and accessible and that enable the whole group to participate fully and be actively involved. The principles of inclusion should be promoted and addressed in policy and practice, ensuring:

- An entitlement to participate.
- Accessibility through adaptation or modification, including the provision of auxiliary aids and services.
- Integration through participation with peers.

Sometimes it may not be possible to make reasonable adjustments to include a young person in a specific visit or activity, nor to provide the whole group with a suitable alternative, perhaps because of a severe disability. It is not necessary to deprive the rest of the group of worthwhile opportunities, if it is genuinely impossible to find a suitable way of including everyone, or after putting in additional support the Risk management plan still deems that pupils and staff may still be at risk

Consideration must be given to the provision of a suitable alternative. The burden of proof is on the establishment, to show that what happened was for a reason other than unfair discrimination.

- Any adjustments that are made in order to include a disabled young person should not impinge unduly on the planned purpose of the activity
- A decision to exclude a young person should not be taken lightly, and only after consultation with those who have responsibility for the young person, including (as appropriate) the head, EVC, Visit leader, Support staff, Parents, any third party provider, Education Visits Advisor and possibly their GP.

Charging for Activities

Schools and Education Establishments must take account of the law relating to charging for school activities, as set out in the Education Act 1996. Schools and local authorities **must not** charge for:

- Education provided during school hours
- Education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- Transport provided in connection with any educational visit of this type.
- Supply teachers to cover for teachers who are away from school on a visit

Schools **may** charge for optional extras, which include, education provided outside of school time that is not:

- a) Part of the Curriculum.
- b) Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
- c) Part of religious education.
- d) Board and lodging for a pupil on a **residential visit**, except to parents in receipt of certain benefits (broadly equivalent to those that qualify children for Free School Meals).
- e) Extended day services offered to pupils (e.g. activity clubs)
- f) Schools must inform parents on low incomes and in receipt of relevant benefits of the support available to them when they ask for contributions.

Using External Provider – pre-booking checks

For any off-site visit, the visit leader should check that the location and activities offered are educationally suitable for the group and will meet the aims of the visit.

- Check that any provider offers good value for money by comparing with other similar providers. Remember that there is no substitute for first hand, up to date information gained by a pre visit by staff.
- When using a specialist venue or activity provider please apply the following guidance before signing any booking form or contract:



LOtC Quality Badge If the provider has the **LOtC Quality Badge** (Learning Outside the Classroom Quality Badge accreditation) The Quality Badge providers have pledged to engage in an ongoing process to sustain high-quality learning outside the classroom and who have demonstrated that they meet six quality indicators

- has a process in place to assist users to plan the learning experience effectively;
- provides accurate information about its offer;
- provides activities, experience or resources which meet learner needs;
- reviews the experience and acts on feedback;
- meets the needs of the users;
- has safety management processes in place to manage risk effectively.

Providers that hold the LOtC Quality Badge are not required to provide schools with additional information on their Safety Management Systems or complete the Provider form

- **Providers who are not LOtC holders will need to complete the Providers Form** (which can be downloaded from the EVOLVE system's Forms section)
- Check that this has been satisfactorily completed by the provider before you book. This requires them to confirm that they have risk assessments in place for all activities/services that they provide and that these are available to view at the premises on request.
- Please note that there is no need to obtain copies of the provider's risk assessments.
- Seek specialist advice on any concerns arising from the provider's responses by contacting your LA Education Visits Adviser.

Local Authority Leader Approval

Who needs LA leader approval?

Any school staff or volunteers who wish to lead any activity or visits in any of the demanding environments (listed in Table 3 these including Field Studies) or adventurous activities (listed in table 4) in the educational visit procedures document which can be found on Evolve under Policy / Procedures must first be confirmed as technically competent to lead the activity by the Education Visits Adviser.

LA Leader Approval Requests

The Person requiring approval **MUST** make a Leader Approval Request via their own EVOLVE account, these cannot be made by another person (EVC). To do this:

- EVOLVE Home Page
- Click the Blue Icon with two white Person
- Click on Awards and Training bottom left
- Click the Blue + button next to LA Leader Approval requests and complete the two sections:
 - a. Details of the activity you are applying for
 - b. A summary of your recent experience

c. click continue

- Then Click on Blue + button Next to My Awards – browse your files and upload all relevant qualifications including an in date first aid certificate – click continue **Your Head will then approve your request and then the LA. Approval lasts for 3 years after which you will need to resubmit in the same way.**

Approval is normally given only if the following conditions are met:

- The leader has completed a training course in the relevant NGB leadership award where one exists (or has undergone other appropriate training)
- The technical adviser has made a practical assessment of the leader and can confirm that they are operating at the standard of the relevant NGB leadership award or at a suitable level for a site-specific approval to be given. **(To arrange technical adviser approval the EVC must identify an appropriate technical adviser who is willing to make a signed statement of competence for the visit leader)**

Depending on depth of experience and technical skill, leaders may be given approval to lead either:

- the activity/activities at specific, named venue(s) at any time for the duration of the approval period;
- or
- the activity/activities at all venues that are within the remit of their competence at any time for the duration of the approval period.

Joint visits or collaborative visits planned with or by another establishment or organisation

Any visit or activity involving young people from your school/establishment, or where young people have been recruited through your school/establishment should be treated as one of your own visits **even if another school/establishment or external provider is taking the lead role in organising the visit.**

Examples include:

- Sports fixtures/tours where your school/establishment has made young people/parents aware of the opportunity but where the tour is being staffed by other adults e.g. Sports coaches, LA staff, Urdd officers or similar.
- Collaborative visits with another school/establishment
- DofE Expeditions where young people from your establishment are joining another establishment's expedition

For these visits, the young person's EVC and Head **must be able to evidence that they have:**

- Ensured that all aspects of planning for the visit meet the county requirements for visit planning and approval **(Please note: another school/establishment may carry out this planning and approval if they are taking the lead role but if this is the case, the visit plan must include all young people and staff attending the visit from all schools/establishments involved and you must view and approve the visit plan)**
- Each participating school should be sufficiently involved in planning for the visit to ensure that the risk management and pastoral care arrangements (including an appropriate level of 24/7 supervision)
- Checked that the planned activities are appropriate for the young people from their establishment
- Ensured that parents are made aware of the arrangements for supervision and the activities planned and have given their consent to this
- Ensured that the supervisory staff for the visit are made aware of any relevant additional needs **(including medical/dietary/behavioural)** for the young people taking part from their establishment
- Ensured that appropriate support will be provided by the visit leaders to manage any additional needs effectively
- Ensured that they can be contacted in the event of an incident, accident or other emergency

Guidance of the Management of cross county collaborative visits

Please read and follow the specific guidance on Cross County Collaborative Visits and Regional visits e.g. **Ski Courses and Regional Sports Teams** which can be found on the EVOLVE home page (in the Guidance section) to ensure that best current practice is followed on collaborative visit. The section includes:

- Payments
- Trip Management
- Use of 3rd Party organisations

Blanket approval

Blanket approval may be given:

- by Heads for staff to run routine visits
- by the LA for those staff who have gained LA leader approval

For visits that have been given blanket approval, the visit leader and EVC must ensure that relevant information is left with the school/establishment emergency contact including details of the venue, activity, group, transport, start/finish times and other relevant information for **each** visit.

Arrangements for overseas visits and overseas expeditions

Overseas Visits

Overseas visit require a longer planning, preparation period and fall into two broad types:

- Complete packages arranged and delivered by an external provider.
- Visit led by the establishment's own staff, or may involve input from a variety of partners and providers in the UK and overseas, but the overall delivery is co-ordinated by the establishment rather than by an external provider

In either case it is essential that an initial LA approval must be obtained before booking confirmation. Initial LA approval can be sought by completing and sending the overseas visit approval form to the Education Visit Adviser. **Initial approval for the planning phase will be given at least 3 months prior to visit.**

- **HEAD MUST** approve on the EVOLVE system **AT LEAST 42 days before the visit.**
- **Final LA approval for the visit on the EVOLVE system at least 28 days before the visit start date.**

Overseas Expeditions - Please refer to the Guidance on Overseas Expeditions which can be found on the EVOLVE home page in the Guidance section.

There are no UK statutory standards regulating Overseas Expedition providers but the following are relevant:

- The Learning Outside the Classroom (LOtC) Quality Badge for Overseas Expeditions gives assurance of both quality and safety, and is evidence that the provider claims compliance with British Standard BS 8848:2014. It does not involve any inspection of overseas work.
- British Standard BS 8848: 2014 "a specification for the provision of visits, fieldwork, expeditions, and adventurous activities outside the United Kingdom" is a non-statutory standard against which providers can declare their conformity following self-assessment or assessment by an external body (there is no regulation of the assessing bodies). Any provider claiming to conform to BS8848 who was found not to provide what is required by the standard would be in breach of contract.
- The school / Education Establishment **MUST provide parents with full information** about the visit so that they can make informed decisions when consenting to the arrangements, including

any “Plan B” alternatives. A pre-visit parental briefing session is good practice. It will provide an opportunity for parents to ask questions.

Educational Visit and the threat of terrorist attacks

A heightened state of vigilance continues to be required for all educational visits. We advise to exercise caution in public places. For up to date guidance please visit EVOLVE's Guidance section

Schools should consider a risk / benefit analysis of trips:

- a. Why? - Is it part of the curriculum /necessary or a reward trip?
- b. Where? The Environment - Urban/cities/theme parks/outdoor activities
- d. Transport? Public/Private/walking/
- c. Visit Programme and Learning Outcomes

Schools should consider the following points in relation to any visit:

- Review their visit itinerary and risk assessments (e.g. keep movement around large cities at least to a minimum) to ensure the Visit Leaders remain confident in running the trips.
- Remote supervision management in all cities, travel hubs and crowded public spaces should be reviewed; close supervision is likely to be more appropriate, with very clear boundaries, known meeting points with plan B meeting points also in place (the impact of even a false alarm on a group that is separated could be significant). All staff and students need to be aware of the emergency contact arrangements.
- Visits Leaders need to consider allowing more time for increased security checks (at borders, events, etc.) and the impact this may have for example at air/ferry ports and other travel hubs. Those holding non-EU passports may experience further disruption and this needs to be considered during the planning stages.
- Before and during any visit abroad, the FCO website, <https://www.gov.uk/foreign-travel-advice> should be regularly checked for the country/ies being visited or transited.
- There should always be access to contingency funding arrangements and plan B in place should the need arise to make changes to itineraries. Visit leaders and schools must consider how they might manage total travel disruption and mobile/communication interruption.
- Designated 24/7 home base emergency contacts must (as always) ensure they have all necessary documentation for the respective trips and make arrangements to remain in contact with visit leaders throughout the trip.
- When arranging foreign travel, staff should always ensure they have an out of hours contact for any booking agents and/or third party provider(s).
- The Education Department's Emergency / Critical Incident plan would be implemented if schools were beyond their coping mechanisms. Departmental Senior Management and Key Officers have access to documentation provided by schools for trips via EVOLVE.

DofE Award groups / Unaccompanied Expedition groups

Anyone planning a DofE Award expedition or unaccompanied expeditions should read the **Guidance for unaccompanied Expeditions on EVOLVE as this document is intended to set a benchmark for good practice for all involved and** to ensure that the Expedition meets the requirements of the Local Authority. It is best practice to have a lead Expedition / Visit leader who holds the overview of the whole expedition and an appropriately competent deputy. Schools need to ensure that staff involved in remote lone working during expeditions are competent and aware of the safety implications including emergency procedure and relevant issues.

Media Considerations

It is strongly recommended that there is control over indiscriminate and potentially damaging use of mobile phones and social media by groups on educational visits. This is especially important when

dealing in the unlikely and unfortunate event of an incident / accident as this may impede the support of dealing with an emergency.

6. Record keeping/ Monitoring

Routine visits

A copy of the completed *Routine visit planning form* should be kept on file for 5 years for each routine visit **(electronic file storage or hard copy are both acceptable)**.

Visits planned on EVOLVE

The EVOLVE system acts as a record for any visit planned and approved on the system.

Schools/establishments therefore only need to retain the following details for any particular visit:

- List of participants
- Parental consent forms (**NOTE: these can be destroyed 3 months after the visit if no accidents or incidents have been reported**)

Where an accident or incident has been reported the school/establishment should:

- Retain the parental consent form for the pupil(s)/young person(s) involved.
- If there has been an accident/incident on a visit, schools/establishments must ensure that the LA is notified according to LA procedures. The LA will keep accident/incident records until the young person reaches age 21 (or for 3 years in the case of an adult).
- Schools/ establishments therefore do not need to retain records of accident/incidents reported to the LA unless they wish to do so for their own purposes.
- If a visit leader or school/ establishment receives notification of a claim they should not respond directly but should pass the details to the LA claims manager/insurance section.

In addition, schools/establishments should archive in the school/ establishment records a copy of their:

1. Educational visits policy – dated so that the version current at the time of any visit can be traced;
2. Standard risk management procedures dated as current at the time of the visit;
3. Records of staff competence and training (perhaps as part of the appraisal/performance management records). This information should be kept for 5 years after which it may be destroyed.

Monitoring

Internal monitoring by the Head/EVC

The Head/EVC must monitor visit leaders from time to time to ensure compliance with school/establishment policy.

Monitoring by the Head/EVC should include:

- scrutiny of standards of visit planning and organisation as part of the visit approval process
- occasional observation of visit leadership

Following any observation of visit leadership it is good practice to provide the visit leader with verbal and written feedback and recommendations for further training if necessary. A copy of the observation report should be given to the visit leader and another copy kept on file by the school/establishment.

Monitoring by the LA

The LA will monitor schools/establishments on a 5 year cycle to ensure compliance with LA guidance. The LA will contact EVCs to notify them of an upcoming monitoring visit.

7.Incident Management

Emergency action flowchart for Visit Leaders and School Base Emergency contacts

- This sections sets out the action to be taken, in the event of an Emergency /Critical incident on an educational visit.
- Schools/ Establishments are provided with emergency action flowcharts and this must be carried by all visit leaders taken part in any offsite activity or visit.

Definitions

- Emergency incident on an educational visit is defined as an incident requiring the emergency services that affects participants on an off-site visit organised by a school or other LA service for young people.
 - Critical incident is an incident which goes beyond the coping mechanisms of the Visit Leadership Team and the Establishment
1. Incident: a situation dealt with by the Visit Leader, who remains in control and can cope
 2. Emergency: an incident that overwhelms the coping strategies of the Visit Leader so that they refer to the Emergency Contact for help
 3. Critical Incident: an incident that meets the definition and is probably overwhelming the coping strategies of both the Visit Leader and the school's Visit Emergency Plan.

EMERGENCY ACTION FLOWCHART FOR VISIT LEADERS

This flowchart must be carried by all visit leaders taking part in the visit

**In the event of an emergency - Do not speak to the media
01978 292289 or (Delta Wellbeing – 0300 333 2222.)**

Give first aid if necessary. Make sure the rest of the group are accounted for and looked after.

Can you deal with the incident yourself?

No

Yes

Is this an Incident which requires the emergency services?

Yes

No

Inform your Base Emergency Contact as soon as possible

Call emergency services 999 or 112 and answer the operator's questions about the incident

Follow instructions given by emergency services (if applicable) and / or Base Emergency Contact Continue to monitor group to minimise risk of any further incidents. Stay near a phone to handle further calls from Emergency services or Base Emergency Contact

Emergency Contact Crib Card

1. School/establishment Office Number: 01244 570588

2. Base Emergency Contact

Name: Mrs Joanne Lee to be given to trip leader

Name: Mr Simon Corner to be given to trip leader

In the event of a Critical Incident or serious incident that can't be dealt with by yourself and where your Base Emergency Contact is not contactable contact the LA:

(Office hours)

Name: Education Dept

Tel:01978 295401

Out of office hours

Name: Delta Wellbeing

Tel: 03003332222

Emergency Procedures: LEADER / TEACHER INCAPACITATION

USE COMMON SENSE in terms of looking after yourself and group

PRIORITY IS TO KEEP GROUP SAFE AND WARM AND TO AWAIT FURTHER HELP –School safety procedures will kick in if a group is late back – help will arrive.

What to do

MAY NEED TO MOVE TO A SAFE AREA and out of immediate / further danger.

USE KIT TO KEEP GROUP WARM / SAFE

ADMINISTERING 1ST AID – may have to move if safe to do so.

PHONING FOR ASSISTANCE –

Use Leaders phone to ring:

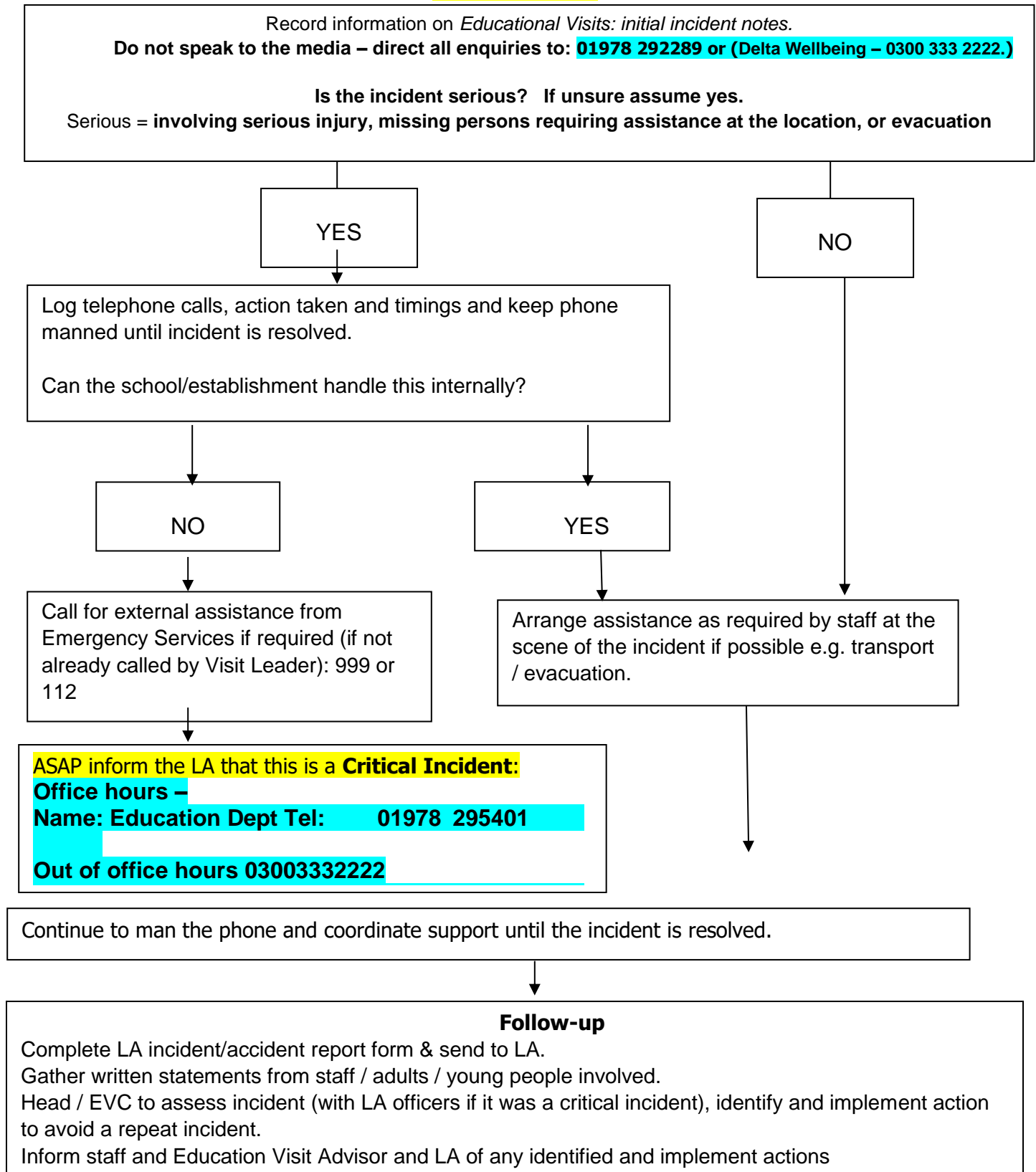
School Base contact: 01244 570588 and/or Emergency Services (999 or 112 if no signal)

GIVE AS MUCH INFORMATION AS POSSIBLE:

- Location and details of the incident
- Numbers injured & name of instructor
- Action taken - NEED EMERGENCY SERVICES?

DO SUMMON HELP FROM OTHER GROUPS AT THE VENUE IF SAFE TO DO SO.

School/establishment office and the nominated Base Emergency Contact for each visit



Educational Visits: initial incident notes

This form can be used by the Base Emergency Contact (or LA call handler) to take rough notes during the period that they are handling an emergency call. The Head must ultimately ensure that the LA incident/accident reporting procedures are completed as soon as possible after the incident.

Name and role of person making the emergency call _____

Contact number(s) for person making call _____

Name and number of Base Emergency Contact (if different from above)

Name of group's school/establishment _____

Number in group and age range _____

Name(s) of any lost or injured individuals(s)

- 1.
- 2.
- 3.
- 4.

Time and date of incident _____ Location of incident _____

Activity taking place at the time _____

Vehicles involved (if applicable) _____

Description of incident and action taken (continue on separate sheets as necessary)

Form completed by _____

Date: _____

8. Risk management procedures

This section sets out the standard risk management procedures that are followed by staff of this school/establishment when leading off site visits.

- You **must** amend the risk management procedures in this section to reflect the way that **your** visit leaders manage off site visits.
- It is important that it reflects actual practice on visits run by your school/establishment – **if it's written down then all will be expected to comply.**
- Once completed, this is the standard risk assessment for all off site visits run by your school/establishment.
- The only additional written risk assessment any visit leader would need to undertake is for risks that are **above and beyond** those set out in the standard school/establishment risk assessment.
- **For Joint Visits - those involving one or more schools then all participating schools** must agree and sign the **Risk Management Agreement Plan for the visit** (please see below **Risk Management Form for Joint visits**). These visit might include residential visits to Glan Llyn, Ski courses, Sporting Events etc.
- For the **Joint Schools Skiing Trips** run under **North Wales Schools Skiing** the guidance notes found on EVOLVE in Resources and Guidance must be followed

Risk management form: All off site visits

Significant hazards and harm which may occur	Who might be harmed?	Safety measures: <i>Measures that are in place and/or will be taken to reduce the risk to a tolerable level</i>
Crossing roads/walking along pavements	Pupils	Brief children of conduct expected of them when walking/crossing roads Ensure staff are placed at front, middle and rear of children. Pupils to walk in pairs or single file. Members of staff to choose safe place to cross roads (if not using recognized pedestrian crossing) 2 members of staff to stand in road with children walking between.
Weather conditions	Pupils/staff	Check weather forecast prior to visit Brief pupils/parents of possible weather conditions prior to visit Ensure appropriate clothing/footwear is worn or taken bearing in mind Summer and Winter conditions Check with parents that it is OK to put sun cream on children Take spare clothes for children not suitably prepared Ensure emergency shelter is taken if in demanding environment
Scientific demonstrations at science venues	Pupils	School/establishment staff to ensure that pupils follow instructions of qualified staff at venue and to adhere to rules regarding proximity
Trips, slips and falls	Pupils/staff	Ensure appropriate footwear is worn and shoelaces tied Brief pupils/staff of possible areas where trips, slips and falls may occur Ensure First Aid kit is carried by visit leader Ensure any medical conditions of pupils are disclosed prior to visit
Transport to and from venues	Pupils/staff	Ensure recognized LA bus company is used Ensure seat belts are worn at all times and are checked by visit leader
Stranger danger	Pupils	Ensure children are made aware not to walk off with an unknown adult unless given specific instruction by visit leader. Regular head counts Supervised at all times, including appropriate supervision when toileting

Beach/coastal visits - washed into sea caught by rising tide	Staff and pupils	Check tide times before embarking on trip Check weather forecast for day of visit Brief pupils and staff not to go near water's edge
Accident/emergency	Staff pupils	Follow emergency procedure guidelines carried by visit leader Ensure suitable staff helper (in addition to visit leader) understands emergency procedure Brief children of what to do in an emergency and how to summon help
Getting lost/separated from group (outdoor venues)	Staff	Regular headcounts Ensure pupils are to stay in small groups Ensure staff accompany pupils at all times Brief pupils to stay put if lost or separated and to shout for attention Ensure all pupils know name of visit leader, staff and school/establishment name
Getting lost/separated from group (indoor venues)	Staff	Regular headcounts Ensure pupils are to stay in small groups Ensure staff accompany pupils at all times Brief pupils to stay at venue if lost or separated never to leave the premises Brief children to make their way to reception Ensure all pupils know name of visit leader, staff and school/establishment name
Medical Conditions	Pupils	Ensure medical conditions are disclosed prior to visit Ensure consent is given for staff member to administer medicine if required Ensure medicines, epi pens, inhalers, etc. are carried by visit leader Ensure at least one staff member/adult volunteer knows how to administer medicine if required.
Walking in local countryside	pupils	Brief pupils and helpers of proposed route Brief pupils of appropriate behaviour Ensure member of staff at front, middle and rear of pupils Ensure correct clothing and footwear is used

Farm Visits Machinery, vehicles, risk of allergy, contamination, bites, kicks, etc.	Pupils and staff	Brief pupils to stay out of way of machinery/vehicles and to follow supervision by farm staff Ensure parents have informed staff prior to visit of possible allergies Ensure medicines are carried by visit leader (if required) Brief children not to touch animals unless safe to do so Ensure pupils/staff are made aware of farm rules, reinforced by farm staff Ensure all eating is done in hygienic locations Ensure children wash hands before eating Make sure First Aid kit is carried
Castle visits High walls – falls Steep, dark stairs - falls	Pupils and staff	Visit leader knows venue and specific areas of risk in the castle (following recce) Brief other staff Supervise pupils appropriately

Additional notes: Standard risk management procedures are reviewed and updated annually. Old versions are kept on file.

Risk Management Form for Joint visits

This form must be completed jointly and signed by the visit leader of all participating school(s) and shared with all leaders. This form should then be scanned and attached to the EVOLVE visit form.

Participating schools: Name of participating schools

Date risk assessment completed:

Completed by (name, school & signature):

Date of visit :

Significant hazards and harm which may occur	Who might be harmed?	Safety measures: <i>Measures that are in place and/or will be taken to reduce the risk to a tolerable level</i>
Transport to and from venues: <ul style="list-style-type: none"> Road traffic accidents Behavioural issues 	Pupils Staff	Ensure recognised LA bus company is used Ensure seat belts are worn at all times by staff and pupils and are checked by school visit leader Visit leader to have available information re pupils and staff in case of an emergency en route - first aid kit / sick kit. Expectations of behaviour to be communicated to pupils at the beginning of the journey - e.g. pupils remain seated. School staff supervise the pupils in their care to ensure they behave appropriately during the journey.
Accident/emergency: <ul style="list-style-type: none"> To pupil To member of staff 	Pupils Staff	Follow provider and school's own emergency procedures in the event of an incident. Ensure all staff understand emergency procedures. Brief children of what to do in an emergency and how to summon help. Ensure County accident / incident form is completed. If an adult emergency, ensure enough supervisory cover remains throughout the visit.
Medical conditions (staff and pupils) & behavioural issues	Pupils Staff	Ensure all consent forms are completed correctly prior to the visit and consent is given for staff member to administer medicine if required. Ensure medical conditions of staff and pupils are disclosed prior to the visit and known to organising provider staff). IEBPs /Personal Risk Assessment must be brought and

		<p>shared with supervisory staff as and when appropriate</p> <p>Ensure medicines, epi pens, inhalers, etc. supplied are stored safely and available to use in emergency.</p> <p>Inhalers to be accessible to pupils during activity sessions</p> <p>Ensure at least one staff member/adult volunteer knows how to administer medicine if required.</p>
<p>Time outside of Centre staff-led activities (including before/between/after activities, mealtimes and overnight):</p> <ul style="list-style-type: none"> • Behavioural issues • Stranger danger 	Pupils Staff	<p>Pupils given guidelines re expected behaviour around the centre between activities.</p> <p>School's own behaviour policy to be implemented.</p> <p>Ultimate responsibility with staff from the individual schools.</p> <p>Pupils are reminded of the rules / boundaries regularly.</p> <p>School staff to be responsible for their pupils during free time and meal times.</p>
<p>Town/Resort visit:</p> <ul style="list-style-type: none"> • Road traffic accidents • Stranger danger • Getting lost • Behavioral issues 	Pupils Staff	<p>Brief children of conduct expected of them</p> <p>Brief children on specific risks in town e.g. road traffic (and safe crossing point), stranger danger</p> <p>Ensure staff are placed at front, middle and rear of children when walking as a group</p> <p>Regular headcounts</p> <p>Ensure pupils stay in small groups</p> <p>Ensure pupils are accompanied by an adult at all times during the visit</p> <p>Brief children on action to take if they get lost or separated from their group</p> <p>Ensure that buses are up to standard, seatbelts are working and have a certificate of "road use". Draw driver's attention to any defects/ problems.</p> <p>Train breakdown – discuss with train driver options available to the passengers and discuss with staff on train where possible.</p>
<p>Centre staff-led activities</p> <ul style="list-style-type: none"> • Behavioural issues • Emergency or accident to pupil or staff member 	Pupils Staff	<p>Inform supervisory staff of any issues regarding medical or behaviour.</p> <p>Staff to report any incident or accident to manager of Centre and follow accident / emergency procedures.</p>

Glossary of Acronyms

OEAP - Outdoor Education Advisers' Panel

EVC - Educational Visit Coordinator

LOTG - Learning Outside the Classroom

FCO – Foreign and Commonwealth Office

NGB – National Governing Body