

Wirral Council Policy and Guidance for Educational visits and Offsite Activity

Version 1.0

**This Policy and Guidance Document supersedes the documents
entitled Wirral Council Policy for Educational Visits and Offsite
Activity and Wirral Council Guidance for Educational Visits and
Offsite Activity**

The Governing Body adopted this Policy: September 2021

Signature: *A Jennings* (Chair of Governors)

Signature: *C Lahive* (Head Teacher)

CONTENTS

Wirral Council Policy for Educational visits and Offsite Activity **page 3**

Wirral Council Guidance for Educational visits and Offsite Activity **page 14**

Wirral Council Policy for Educational visits and Offsite Activity

1. Introduction

This Policy document is for Community, Community Special, Voluntary Controlled, Maintained Nursery schools, Pupil Referral Units and Statutory Youth Groups who are part of the Children and Young People's Department.

This policy document can be adopted by Voluntary Aided, Foundation, Academy, Independent and Free schools. These types of schools should produce a Policy Statement that outlines their intention to adopt Wirral Council's Policy and Guidance document. A Service Level Agreement is available to purchase. A brief summary of the service is detailed below:

Wirral Council Educational Visits Adviser Service will provide:

1. Advice and support on all aspects of the Educational visits process
2. Establishment access to the Wirral Council EVOLVE website for Educational visits
3. An online advice and notification procedure with approval procedure for specific Educational visits to check that arrangements reflect Wirral Council/Employer guidance and current good practice
4. Access to a range of training courses, some of which may be subject to an additional charge.

Educational Visits Policy

This policy on Educational Visits and Offsite Activity applies to all Educational establishments where the Council is the Employer.

An outline of an Entitlement Service for all Community, Community Special, Voluntary Controlled, Maintained Nursery schools, Pupil Referral Units and Statutory Youth Groups who are part of the Children and Young People's Department is located within this document on page 13.

In Establishments where Wirral Council is **not the Employer** (for example Voluntary Aided, Foundation, Academy, Independent and Free schools) this policy is provided as an example of good practice. These schools should adopt their own Employer Guidance Policy. Wirral Council does not assume the responsibility of the Employer for Voluntary Aided, Foundation, Academy, Independent and Free schools.

Every year thousands of children and young people from Wirral schools and Children and Young People's Department participate in Educational Visits and off-site activity as part of their Educational experience or personal development. These activities and opportunities are integral to a rounded educational experience which excites, challenges, motivates and stimulates learners.

This policy sets out how Wirral Council will manage this aspect of learning. The policy will include health and safety requirements.

2. Definitions

Adventure Activities: Activities that take place in challenging environments that can present technical or environmental complexity in the organisation or delivery of the activity. Many adventure activities have well established National Governing bodies that train, assess and validate the competency of staff to lead in the activity.

Educational Visits: All visits with a group of young people that leave a school site to journey to another location either during the school day or for extended periods beyond the school day. This usually does not include work experience or activity in schools on split sites. This activity is planned and organised by the school.

Off-site Activities: Activities that occur away from the base of regular work with children or young people organised by staff who work within Children's Services.

Learning Outside of the Classroom (LOtC): Activity that takes place on the school site and further afield. Some of this work falls under the category of Educational Visits.

Children and Young People: all young people under the care of Children's Services whether from a school or setting.

Staff: In the context of this policy staff are defined as any employee of Wirral Council any agency worker or volunteer working for Wirral Council including elected members of Wirral Council.

3. Application:

This policy applies to any of the following activities when undertaken by young people under the supervision or control (whether pastoral or direct) of Wirral Council staff. This policy also applies to activities which are facilitated by Wirral Council or any of its maintained schools or other services.

- Off-site activities, visits or excursions
- Activities that fall within the remit of Learning Outside the Classroom
- Adventure Activities

This policy applies regardless of whether or not the activities take place within or outside of normal working hours including weekends and holiday periods.

Wirral Council has formally adopted Outdoor Education Advisor Panel (OEAP) 'National Guidance' as the source guidance for this policy from the website: www.oeapng.info

It is a legal expectation that employees must work within the requirements of their Employer's Guidance. Wirral Council Children and Young People's Department and their employees must follow the requirements of 'OEAP National Guidance' in addition to the requirements of this policy statement which are highlighted below. Please refer to section 4 Policy Statement.

Where there is any variance of policy between the National Guidance and local policy this Policy Statement sets out Wirral Council's requirements which take precedence over any National Guidance.

Where a Wirral Council employee commissions LOtC activity they must ensure that this particular commissioned agency has either of the following:

- Wirral Council Guidance or OEAP National Guidance
- A system in place where standards are no less than those required by OEAP National Guidance

Planning, notification, approval, monitoring and evaluation of all visits

This is carried out through the use of Evolve. Evolve enables the Council to check, approve (if approval is provided), monitor, evaluate and audit Adventurous, Residential, Standard Overseas and Major Overseas Visits.

It is highly recommended that all other visits are entered onto EVOLVE in order to support Establishments with the planning, processing, monitoring and evaluating of visits.

4. Employers of Voluntary Aided, Foundation, Academy, Independent and Free schools

In establishments where the council is **not the employer** (for example, Voluntary Aided, Foundation, Academy, Independent and Free schools) this policy is provided as an example of good practice. These schools should adopt their own employer guidance policy. Wirral Council does not assume the responsibility of the employer.

Where another employer (such as Governing Body/Trustee/Owner of a Voluntary Aided, Foundation, Academy, Independent and Free schools) wishes to opt into Wirral Council's Guidance, systems and processes for supporting and monitoring all LOtC activities the Employer should produce their own Policy Statement that outlines this intention.

5. Policy Statement:

Wirral Council recognises the important role that educational visits, off-site activities, adventurous activities and Learning Outside the Classroom (LOtC) plays in providing a rich and rewarding education for children and young people irrespective of age, ability or circumstances.

Wirral Council actively supports and encourages such activities and recognises that this may involve exposing participants to challenges and risks with which they may not be familiar. The Council ensures arrangements and procedures are in place to identify and manage these risks against the benefits of the activity. It is the Council's policy so far as is reasonably practicable that all activities falling within the scope of this policy should:

- Comply with recognised sector best practice guidance with respect to issues falling within the scope of this policy. For the purposes of this policy this signifies compliance with the National guidance issued by the Outdoor Education Adviser's Panel (www.oeapng.info) unless this guidance is specifically over-ridden by a requirement within this or any other Wirral Council Health & Safety Policy
- Be allocated sufficient resources (time, planning, staff and budget) to enable activities to be undertaken safely

- Follow a Risk Management process that is informed by a Risk Benefit Assessment where the benefits of the proposed activity are balanced against the risks. Detail is to be included on how the risks can be managed. There maybe some background or residual risks elements remaining and these could be viewed as acceptable. Part of the curriculum and learning for young people is to know how to identify and manage appropriate risk. Where risks to participants are viewed as unacceptable then the activity must not be carried out until further advice has been sought from the Council's Educational Visits Advisor.
- Be monitored to satisfy the Council that the requirements of this policy are being met.

6. Third Party Providers

Where activities that fall within the scope of this policy are being provided by a third party the Council will require that:

- Reasonable comprehensive checks of any external organisations that are contracted to provide any activities regardless of whether these activities are being undertaken on or off-site are carried out to ensure that the external organisations are suitably trained, qualified and competent to provide such activities. These checks also need to ensure that the external provider carries a minimum of £5m public liability insurance coverage from an approved UK insurer.
- Checks are made via an external validation process using an Inspection and Accrediting Body which may include the Adventure Activities Licensing Service, the LOtC Quality Badge and Adventuremark or sector Approval schemes. Wirral Council endorses the LOtC Quality Badge Scheme. Confirmation about individual Awarding Body schemes should be made via the Educational Visits Advisor
- The performance of external organisations is adequately monitored to ensure that agreed practices are being met
- The significant findings of monitoring are acted upon and reported to the Educational Visits Advisor and/or Governing Body of the school. Please refer to Section 29 within this Policy and Guidance document.

Where activities involve either Travel Abroad or the provision of 'Adventure Activities' led by Wirral Council or by a third party provider the Council requires that these be submitted to the Educational Visits Advisor for checks and approval early in the planning stages. Please refer to the front screen on Evolve which outlines the notification, checking and approval procedures for Adventurous, Residential, Standard Overseas and Major Overseas Visits.

To secure the policy objectives the Council will put arrangements in place to:

- Establish and maintain systems and procedures to enable schools and settings to comply with the requirements of this policy. All schools and settings will be required to record and manage activities falling within the scope of this policy using the Evolve online system.
- Provide advice to enable staff with responsibilities for any aspect of this policy to meet any requirements placed on them.
- Provide written guidance and procedures for staff to enable them to fulfil their responsibilities within the scope of this policy.
- Provide access to suitable and sufficient information and instruction and training for all staff who organise, facilitate, lead and advise on such activities.

- Comply with reasonable directions and instructions issued by external organisations providing such activities where these are issued in order to secure the health and safety of other persons.
- Establish structures to enable the reporting of any significant findings of monitoring activity (e.g. incident reports) to the Council's SMT Chief Executive Strategy Group (CESG).

7. Organisational Responsibilities and Arrangements

In addition to the overall responsibilities for managing health and safety matters that are described in the Council's Health and Safety Policy some specific responsibilities apply in relation to the activities covered by this policy. These are identified in 7.1 – 7.6.

7.1 Director for Children and Young People's Department

The Director for Children and Young People's Department is responsible for the following:

- Allocating sufficient resources to ensure that adequate competent advice is available to provide advice, guidance and support to Wirral Council settings. This is the case when activities fall within the scope of this policy. In order to meet this requirement the Council has formally appointed an Educational Visits Adviser.
- Ensuring that the requirements of this policy are adequately monitored and that appropriate actions are taken to obtain compliance with the requirements of this policy. This is carried out through the use of Evolve. Evolve enables the Council to check, approve (if approval is provided) monitor, review and audit Adventurous, Residential, Standard Overseas and Major Overseas Visits.
- Reporting significant failings in this policy to the Chair of the Chief Executive Strategy Group of Strategic Health and Safety Co-ordinating Group so that they may give direction; and if required, resources to ensure compliance with relevant legislation, Local Authority Policy and Guidance, National Guidance and Industry Best practice to maintain effective oversight of day to day health and safety compliance.

7.2 Educational Visits Adviser

The Council's Educational Visits Adviser is appointed by the Council to provide advice and guidance to duty holders named within this policy so that they can discharge their duties under this policy. This includes any relevant statutory information.

Responsibilities for the Educational Visits Advisor are highlighted below:

- Maintain their competence and keep abreast of legal requirements and sector and industry best practice with regards to activities covered by this policy
- Report significant changes to legislation, LA Policy and Guidance, National Guidance and sector and industry best practice to appropriate key stake holders such as Headteachers, Head of Establishments, Governor Bodies, Trustees and Educational Visits Coordinators and ensure that employee representatives are consulted on matters of health and safety relating to this policy and any associated procedures (e.g. at the School's Health and Safety Committee).
- Provide advice and guidance to schools and settings to enable activities to be carried out safely.

- Monitor schools and settings to ensure that they are complying with all relevant legislation on the conditions set out within this policy
- Report the significant findings of monitoring including any recommended corrective actions to Headteachers, Head of Establishments, Governor Bodies, Trustees and Educational Visits Coordinators and the Council's Risk and Insurance Management Team so that they can discharge their duties in accordance with this policy

7.3 Governing Bodies

Governing Bodies should satisfy themselves that the school has suitable policies and procedures in place to adequately manage and monitor all activities falling within the scope of this policy. The results of monitoring should be discussed at Governing Body and Headteacher Senior Leadership Team meetings.

7.4 Headteacher/Head of Establishment

The Headteacher/Head of Establishment is responsible for ensuring that any activities falling within the scope of this policy are:

- Adequately resourced (in terms of planning, time, staff and budget) to secure compliance with the requirements of this policy and any associated procedures.
- Notified using the Evolve system to the Council's Education Visits Advisor where required under the terms of this policy. Please refer to Section 3 'Approval of Visits' on page 17 of this Policy and Guidance document.
- Led by suitably trained, qualified and competent people.
- Checked comprehensively. If external organisations and third party providers are providing the activity, the Headteacher/Head of Establishment is responsible for ensuring that checks are carried out to ensure so far as reasonably practicable, that suitably trained, qualified and competent people deliver the activities that they have been contracted to provide. These checks also need to ensure that the external provider carries a minimum of £10m public liability insurance coverage from an approved UK insurer. It is the responsibility of third party providers to carry out suitable and sufficient risk assessments for all Educational Visits and Offsite Activities that they provide for the particular school.
- Covered by suitable and sufficient risk assessments and these are brought to the attention of all staff, including volunteers involved/supporting the activity. These should be checked in relation to risk management systems. Risk management systems are required to be in place using a risk benefit assessment tool to ensure that adequate risk management measures are implemented. For activities provided and delivered by third parties reasonable checks of the provider using the risk management system should be used. The Head teacher/Head of Establishment is not responsible for Providers' risk assessments and should not undertake any further risk assessments of a Providers' activities.
- Monitored and any significant findings reported to the council's Educational Visits Advisor and to the school's Governing body so they can maintain effective oversight of these activities.

The Headteacher/Head of Establishment may appoint a member (or members) of their staff to carry out these duties on their behalf for example an Educational Visits Coordinator (EVC). Where such appointments are made the Headteacher/Head of Establishment remains responsible for the standard level of compliance that is to be achieved and they must monitor the performance of these appointed person(s) to ensure that the required tasks are being carried out competently in accordance with legislation, Local Authority Policy and Guidance, National Standards and Industry Best Practice.

The appointment of an EVC should have sufficient authority (i.e. they should normally be a senior member of staff) to enable them to undertake their role. The Headteacher and Head of Establishment should ensure that the EVC is provided with the necessary information, instruction, training and supervision to enable them to discharge their duties effectively.

7.5 Educational Visits Co-ordinators (EVC)

Once appointed EVC's have an additional responsibility to ensure that they bring any significant failings relating to compliance with this policy and its associated procedures to the attention of their Headteacher/Head of Establishment.

The duties of the EVC are outlined below:

- Ensuring that you have an understanding of how Learning Outside the Classroom (LOtC), offsite activities and visits can support a wide range of outcomes for children and young people, and raise achievement.
- Ensuring that you have attended EVC Training as recommended or required by your employer.
- Ensuring that LOtC, offsite activities and visits meet guidance requirements.
- Ensuring that establishment managers, visit leaders, assisting staff and voluntary helpers understand that all staff involved in LOtC, offsite activities and visits require access to training at an appropriate level to ensure that the employer's guidance and establishment procedures are properly understood.
- Ensuring that you have an establishment visit policy. As a minimum, the policy will need to make a link between the establishment's procedures and this guidance.
- Supporting the head/manager with approval and other decisions.
- Monitoring Visit Leader planning and sample monitor visits.
- Organising the training of Visit and Assistant Leaders (including voluntary helpers).
- Ensuring that where the accompanying staff includes someone with a close relationship to a group member, there are adequate safeguards to ensure that this will not compromise group management.
- Ensuring that CRB/ISA checks are in place as required.
- Reasonable comprehensive checks of any external organisations that are contracted to provide any activities regardless of whether these activities are being undertaken on or off-site are carried out to ensure that the external organisations are suitably trained, qualified and competent to provide such activities. These checks also need to ensure that the external provider carries a minimum of £5m public liability insurance coverage from an approved UK insurer. £10m is the preferred amount of liability cover.
- Ensuring that establishment policy provides sufficient guidance to Visit Leaders about information for parents and parental consent.
- Checking that there is a 24/7 emergency contact(s) with the base for each and every visit and that emergency arrangements are in place.
- Ensuring that medical and first aid issues are addressed.

- Ensuring that emergency arrangements include emergency contact access to all relevant records, including medical and next of kin information for all members of the party including staff.
- Ensuring that individual activities and visits are reviewed and evaluated and that this process includes reporting of accidents and incidents, complying with employer requirements and Reporting Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR).
- Ensuring that policies and procedures are reviewed on a regular basis. A review should follow any serious incident or systems failure. Risk management documentation must be updated if necessary.
- Ensuring that there is an establishment procedure for recording 'near accidents/near misses', including any resulting learning points and action.
- Ensuring that you keep up to date via EVC update processes and EVC Revalidation courses as recommended or required.
- Ensuring that Assistant Leaders are competent to carry out the tasks they are assigned.
- Ensuring that activities and visits are led by competent and confident leaders. The Visit Leader needs to be both accountable and competent. Being accountable implies being an employee and thus part of a chain of specified roles and responsibilities. Being competent requires that the leader can demonstrate the ability to operate to current standards of recognised good practice. For further details, see the Guidance for Visit or Activity Leader.

The duties of the Visit Leader:

- Liaise with your establishment's Educational Visits Co-ordinator (EVC) and ensure that your respective roles are clear.
- Be formally approved to carry out the visits.
- Be specifically competent.
- Plan and prepare for the visit, taking a lead on risk management. It is good practice to involve all staff in the planning and risk management process to ensure wider understanding. It is also good practice to involve young people in these processes wherever appropriate.
- Define the roles and responsibilities of other staff (and young people) to ensure effective supervision, appointing a deputy wherever possible.
- If the staff team includes someone with a close relationship to a member of the group, ensure there are adequate safeguards so that this will not compromise group management.
- Ensure that child protection issues are addressed (e.g. vetting including CRB checks).
- Provide relevant information to supporting staff, including about the nature and location of the visits and about the participants (including age, health information capabilities, special needs, safeguarding and behavioural issues).
- Ensure that informed parental consent has been obtained as necessary.
- Provide relevant information to parents and young people, and arrange pre-visit information meetings where appropriate.
- Make sure there is access to first aid at an appropriate level.
- Ensure the activity/visit is effectively supervised.
- Ensure that all staff and any third party providers have access to emergency contact and emergency procedure details.
- Evaluate all aspects of the visits, both during and after the event.
- Report any accidents, incidents or near-misses.

The duties of the Assistant Leader:

- Be specifically competent and knowledgeable about establishment and employer policies/procedures, in so far as they affect the responsibilities you have been assigned.
- Ensure that you have been sufficiently involved in the planning and preparation for the activity/visit, including contributing to the organization of risk management.
- Ensure that you understand the role and responsibilities that you have been assigned and how these integrate with other staff and especially that of the activity/visit leader.
- Ensure that you are clear about any arrangements to hand-over and hand-back responsibility for supervision between member of staff and to/from any third-party provider.
- Ensure that staff and other supervisors have been appropriately briefed on:
 1. the young people making up the group, including age, health characteristics, capabilities, special educational needs, behaviour and any other information that seems relevant in the context of the planned activities.
 2. the nature and location of the activity.
- Contribute to the ongoing monitoring of all aspects of the activity/visit, including the quality of any activities provided by a third-party provider.
- Contribute to the evaluation of the activity/visit after the event.

The duties of the parent/adult volunteer:

- Make sure you understand the role, responsibilities and limitations that you have been assigned and how these fit with other staff including the Visit Leader.
- Be competent and confident for the role and responsibilities that you have been assigned.
- Know about establishment and employer policies and procedures insofar as they affect the responsibilities you have been assigned, and work within these.
- Ensure that you have been briefed about the nature and location of the visit and about the participants (including age, health information, capabilities, special needs, safeguarding and behavioural issues).
- Report any concerns you have during the visit to the Visit Leader/Assistant Leaders as soon as possible.
- Be prepared to contribute to the evaluation of all aspects of the visit, both during and after the event.

7.6 Staff

Staff are responsible for taking care of themselves and for others affected by their actions or their omissions. In the context of this policy this significance is outlined below:

- Co-operating with line managers and supervisors by implementing the agreed actions of any risk management process and planning when they undertake or are involved in activities falling within the scope of this policy
- Reporting any failings in the risk management process relating to activities falling within the scope of this policy to the attention of management
- It is an expectation of this Policy that all Wirral council staff have been formally assessed as competent to undertake such responsibilities that have been assigned to them

8. Emergency Planning, Critical Incident Support and Incident Reporting

A critical incident may include an incident where any member of a group undertaking an off-site activity has:

- Either suffered a life threatening injury or fatality
- Is at serious risk
- Or has gone missing for a significant and unacceptable period.
- Schools should follow their school emergency plan and should have this documentation at all times during all Educational Visits and Offsite Activities. For the LA Emergency Plan and documents please refer to Section 27, Appendices 4 and 5 within this Policy and Guidance document.

Incidents and Near Misses

All health and safety related incidents including any “near misses”, arising from activities covered by this policy must be reported using the M13 ‘Accident and near miss form’ and sent to the Council’s CYPD Health and Safety Team. Serious incidents must be reported immediately by telephone/email 0151 606 2216/2211 debbietodd@wirral.gov.uk.

9. Monitoring and Review

The effectiveness of this policy will be monitored and reviewed in accordance with the Council’s Health and Safety Policy.

10. For more advice

All policies and procedures form part of the Council’s Terms and Conditions of Employment and therefore care should be taken with their application.

11. Links to Other Policies

This policy is linked to the following documents:

- Wirral Council’s Health and Safety Policy
- School Framework Health & Safety Policy
- Health and Safety Management Arrangements for First Aid
- Health and Safety Management Arrangements for Accident Reporting
- Health and Safety Management Arrangements for Risk Assessments
- The Administration of Medicines in School’s and Early Years Setting
- Safe Practice in Physical Education and School Sport (afPE 2012)
- Safeguarding Policies and Procedures
- School Trips and Outdoor Learning Activities (HSE)

12. For more information

Information on how to apply this specific policy is available from Gaby Crolla the Council’s Educational Visits Advisor. Gaby Crolla Tel: 0151 666 5255 gabycrolla@wirral.gov.uk

ENTITLEMENT SERVICE

For all Community, Community Special, Voluntary Controlled, Maintained Nursery schools, Pupil Referral Units and Statutory Youth Groups who are part of the Children and Young People's Department

The following are provided by entitlement:

- Access to web based 'Evolve' which supports planning, notification, approval (if approval is provided), monitoring, evaluation and audit of Adventurous, Residential, Standard Overseas and major overseas visits.
- Reviewing and checking all Health and Safety requirements of any visits which require LA approval.
- Providing advice on any issues and concerns on the visit.
- Providing schools with the Wirral Council Policy and Guidance for Educational Visits and Off Site Activity.
- Access to immediate response, advice and coordination in the event of a major incident.
- A helpline to provide advice and guidance to schools and settings to ensure visits be carried out safely.
- Advising on the suitability of a range of external providers which are used by schools. Quality assure a sample of visits in order to provide advice to school Pre, During or Post visit.
- Providing advice on the inclusion of young people with SEN.
- Maintaining a register of staff who are competent to lead specific activities.
- Providing detailed guidance and support on the completion of suitable risk assessments and management plans.
- Access to regular updates, resources and a range of documents and policies that support the school.

Wirral Council Guidance for Educational visits and Offsite Activity

Contents

	Page
Section 1	General 15
Section 2	Role of the Educational Visits Coordinator 15
Section 3	Approval of Visits 17
Section 4	Outcomes 17
Section 5	Inclusion 17
Section 6	Responsibilities 18
Section 7	Planning 19
Section 8	Safety during the visit 20
Section 9	Parent / Carer consent 20
Section 10	Competence to lead 21
Section 11	Staffing, Supervision and Ratios 22
Section 12	First Aid 25
Section 13	Insurance 26
Section 14	Transport 27
Section 15	Farm visits 28
Section 16	Water-margin activities 28
Section 17	Residential visits 28
Section 18	Overseas visits 29
Section 19	Weather, clothing & survival 29
Section 20	Swimming 30
Section 21	Definition of an adventurous activity 32
Section 22	Adventurous activities 33
Section 23	Water-based activities 34
Section 24	Open-country activities 35
Section 25	Snowsports 36
Section 26	Overseas expeditions 37
Section 27	Emergency procedures 37
Section 28	Approval of staff to lead an adventurous activity 38
Section 29	Guidelines for Using an external provider/tour operator 39
Section 30	Which forms to I need to complete? 41
Section 31	Appendices 42

1 General

The purpose of this document is to link the requirements of Wirral Council with National Guidance and EVOLVE.

Wirral Council (The Local Authority) acknowledges the immense value of off-site visits and related activities to young people and fully supports and encourages those that are well planned and managed.

The LA adopts the Outdoor Education Advisers' Panel 'National Guidance': www.oeapng.info

This document hyperlinks to the main National Guidance site. Hyperlinks are used throughout this document however as this guidance is updated regularly it is not possible to hyperlink to specific sections.

The LA uses the web-based system 'EVOLVE' to facilitate the efficient planning, management, approval and evaluation of visits. All staff that lead or accompany visits can access their own EVOLVE account which is set up by their Establishment's Educational Visits Coordinator (EVC).

As well as being an efficient tool for planning and approving visits EVOLVE also contains a variety of features including: search and report facilities, downloadable resources, a link to the National Library, staff records, visit history and gateway access for parents. EVOLVE: www.wirralvisits.org.uk

2 Role of the Educational Visits Coordinator

To help fulfil health and safety obligations for visits Establishments should appoint an Educational Visits Coordinator (EVC) who will support the Head of Establishment. In small Establishments the EVC may also be the Headteacher or Manager. Should the Establishment choose not to appoint an EVC those functions will automatically fall to the Head of Establishment.

The EVC should be specifically competent ideally with practical experience in leading and managing a range of visits similar to those typically run by the Establishment. Commonly, but not exclusively, such competence will be identified in a person on the senior management of the Establishment.

The EVC must attend initial one day EVC training. Subsequent half-day update training (non-compulsory) is available as a refresher and is particularly recommended for those who are involved in the role on an infrequent basis.

The EVC should support the Head of Establishment in ensuring that competent staff are assigned to lead and accompany visits with approval and other decisions refer to Section 10

The EVC should ensure that a policy is in place for educational and off-site visits and that this is updated as necessary. This should be readily available to staff via their Establishment's own EVOLVE Resources section.

Establishments are advised to consider the merits of adapting the sample 'Educational Visits Checklist' (Word version in EVOLVE Resources) to suit their own particular circumstances and uploading this to their Establishment's own EVOLVE Resources section.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

Visit Flowchart
 Note: This process is automatically followed when using EVOLVE

START
 Will an External Provider, Activity Centre or Tour Operator be used?

NO YES

Does the provider hold an LOTC Quality Badge?
www.lotcqualitybadge.org.uk

NO

YES

Email a 'Provider Form' to the provider. Retain completed unmodified form at your Establishment - see [Section 29](#)

Will a member of your Establishment's staff be leading an adventurous activity as defined in [Section 21](#)?

YES

The member of staff must be specifically approved by the LA to lead the activity. Leader Approval must be obtained via EVOLVE - see [Section 22](#)

NO

Will the visit be residential, overseas, or involve an adventurous activity as defined in [Section 21](#)?

YES

NO

Has the Visit Leader been assessed as competent to lead the visit?

YES

YES

Has the visit been approved by the EVC and Head of Establishment?
 If applicable have relevant Checklists and Governing Policy been complied with?

YES

YES

Approval is delegated to the Head of Establishment
 This would normally be via EVOLVE, unless operating under standard operating policies or procedures for simple, local low risk activities
 If approved by Head/Manager:

The visit must also be approved by the LA
 Submit visit to LA via EVOLVE
 If approved:

Establishment should monitor visits on a 'sample' basis

THE VISIT MAY PROCEED

Assess risks on an on-going basis and implement appropriate control measures

Evaluate the visit via EVOLVE

3 Approval of visits

In approving visits the Head of Establishment and EVC should ensure that the visit leader has been appropriately inducted/trained and is competent to lead the visit. Refer to [Section 10](#)

'Ad-hoc' activities: Where there are local activities that are a planned part of the curriculum but are dependant upon the right conditions on the day then the visit leader should sign out before departure leaving relevant information with the base contact. Such activities must be addressed in the school policy with a generic management plan in place. Following the activity visit leaders are encouraged to record the event on the same day on EVOLVE.

All other visits: It is recommended that all other visits are entered onto EVOLVE in order to support Establishments with the planning, processing and monitoring visits.

Based on the visit types EVOLVE automatically directs the flow for approval.

The following visit types are 'authorised' within the Establishment and then 'checked and approved' by the LA via EVOLVE:

- A - overseas
- B - residential
- C - involving an adventurous activity as defined in [Section 21](#)

Approval is delegated to the Head of Establishment for visits which are not in the visit categories highlighted A, B or C.

4 Outcomes

Clarity regarding the intended outcomes of the visit will help to ensure that the potential benefits can be achieved. Up to four 'intended' outcomes may be recorded on EVOLVE during the planning process. These outcomes can be used for subsequent evaluation.

Educational activity that takes place outside the classroom can provide a very powerful means of developing learning in all curriculum areas and raise attainment. Experiential learning can also provide opportunities for development in other areas which include:

- Relationships
- Emotional & spiritual
- Cross curricular
- Individual
- Teamwork
- Environmental

Preparatory work should take place in advance of the visit where appropriate. This in conjunction with activity that will take place during the visit should feed into any follow up work.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

[High Quality Outdoor Education](#) can be used as a tool by visit leaders to assist in both identifying outcomes and in the evaluation of the learning taking place. It can also be helpful in assisting the leader in providing clarity to a provider so that expectations from the visit are coherent with the design of the programme.

5 Inclusion

Under the Equality Act 2010 it is unlawful to discriminate against disabled participants because of their disability without material or substantial justification. The Establishment is required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Disability Discrimination Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that the adjustments made to include a disabled young person should not impinge unduly on the planned purpose of the activity.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

6 Responsibilities

The Health and Safety at Work etc Act 1974 places overall responsibility for health and safety on educational visits with the employer:

- For Community, Community Special, Voluntary Controlled, Maintained Nursery schools, Pupil Referral Units and Statutory Youth Groups who are part of the Children and Young People’s Department. These Establishments must adhere to this guidance document.
- For Voluntary Aided, Foundation, Academy, Independent and Free schools, the employer is usually the governing body or proprietor. These Establishments are not obliged to use the guidance of the LA. If these type of schools are using LA guidance this should be clearly stated in the Establishment policy for Educational visits. If Establishments are not using LA guidance Establishments are advised to ensure that the systems in place are equally as robust as those of the LA.

All persons involved in a visit have a specific responsibility which they should be clear about prior to the visit taking place.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

7 Planning

EVOLVE provides a means of recording processes during the planning phase and enables the EVC and Head of Establishment to contribute, support and monitor the activity.

The extent of planning required is related to the complexity of the visit. Please refer to:

- Educational Visits and Offsite Activity Planning Checklist (see Appendix 16)
- [Planning with EVOLVE](#) diagram.
- [RADAR](#) model: based on STAGED: Staffing, Timings, Activity, Group, Environment, Distance.

Risks are expected to be reduced to an *acceptable* or *tolerable* level and not necessarily eliminated. Planning should achieve a rational balance between potential adverse risks and the intended benefits and outcomes of the activity. See [Managing Risk in Play Provision](#)

Many aspects of planning will normally already be in place in the form of existing policies and guidance such as the Establishment’s own policy and LA policy. These in conjunction with the EVOLVE Visit Form may be sufficient for a particular visit as it is not necessary to repeat generic policies on EVOLVE.

Owing to the complex nature of off-site visits conventional ‘risk assessment’ as a stand-alone tool is not particularly useful and can on occasion be misleading. It is of greater benefit to consider the overall ‘risk management’ of visits by taking all aspects of visit planning and management into account. This can be achieved effectively through a combination of the EVOLVE Visit Form itself and any appended notes and/or attachments.

Visit planning includes consideration of the question: *‘What are the really important things that we need to do to keep us safe?’* Visit planning should focus on those issues that are individual to the specific event, taking into account the needs of the group (including special and medical needs), the experience and competency of the leader and team of staff in the context of the event. Significant issues must be recorded on EVOLVE either in notes or as an attachment and shared with all parties.

This planning process by the leader may be compared to the expectation of a teacher or youth worker to plan a lesson/session/programme which is relevant to the needs of the group.

Planning that includes adventurous activity commonly involves delivery by an external provider (see [Section 29](#)) and the provider will have responsibility for managing the activity.

Alternative arrangements (Plan B) should be included within the planning process where appropriate. For example, where weather conditions or water levels might be critical or where an overcrowded venue might necessitate an alternative option.

It is good practice to involve participants in the planning and organisation of visits as in doing so they will make more informed decisions and will become more 'risk aware' and hence at less risk. They will also have greater ownership of the event.

This statement is endorsed by HSE in [Principles of Sensible Risk Management](#)

An example [Alcohol & Drugs](#) policy is in EVOLVE Resources. Establishments may wish to adapt and/or adopt this if appropriate.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

8 Safety during the visit

Prior to the visit, staff must ensure that all participants understand what is expected of them. This includes any 'rules' that will be in place. These should be re-emphasised as appropriate during the visit.

Monitoring of the visit must be ongoing. This contributes towards both enjoyment and safety.

It is primarily the responsibility of the visit leader in consultation with other staff where appropriate, to modify or curtail the visit or activity (e.g. Plan B) to suit changed or changing circumstances. For example an over-busy lunch area, rain and rising water levels.

Following the visit, the visit leader should record any significant issues as a note on EVOLVE for both reference and to inform future visits.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

9 Parent / Guardian Consent

In relation to schools:

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

Written consent is usually only requested for activities that need a higher level of risk management or those that take place outside school hours.

The LA has prepared a **Parent/Guardian Routine Visits Consent Form** (see Appendix 8) which schools can ask parents to sign when a child enrolls at the school and reviews at the commencement of every academic year. This will cover a child's participation in any of these types of activities throughout their time at the school. These include adventure activities, off-site sporting fixtures outside the school day, residential visits and all off-site activities for nursery schools which take place at any time (including during school holidays or at the weekend). Alternatively Establishments may devise their own consent form.

Parents / guardians must be informed in advance of each activity and must be given the opportunity to withdraw their child from any particular school visit or activity covered by the form. The school must have a robust means of ensuring that changes to parent / guardian contact details and child medical details are up-to-date.

In relation to other Establishments:

Annual consent is appropriate for regular routine activities.

For all other visits consent should be obtained on an individual visit basis. Information provided to parents / guardians prior to granting consent should include full details of the activities and any other significant information.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

10 Competence to Lead

The competence of the visit leader is the single most important contributory factor in the safety of participants. The EVC and/or Head of Establishment must therefore consider the following when assessing the competence of a member of staff to lead a visit:

- a) What experience has the leader in leading or accompanying similar or other visits? (check Visit History on EVOLVE).
- b) Is the leader competent in planning and managing visits?
- c) What are the leader's reasons for undertaking the visit?
- d) Is the leader an employee of the Local Authority?
- e) Does the leader have the ability to manage the pastoral welfare of participants?
- f) Does the leader exhibit sound decision making abilities?
- g) What experience has the leader of the participants he/she intends to supervise?
- h) What experience has the leader of the environment and geographical area chosen?
- i) Does the leader possess appropriate qualifications?
- j) If appropriate, what is the leader's personal level of skill in the activity and fitness level?
- k) If leading adventurous activities has the leader been 'approved' by the LA?
- l) Is the leader aware of all relevant guidelines and are they able to act on these?

Refer to diagram: [Planning with EVOLVE](#)

Refer to relevant section/s of [National Guidance](#) by using the search facility.

11 Staffing, Supervision and Ratios

On all visits there must be an 'effective level of supervision' that has been approved by the EVC and Head of Establishment and where applicable is in accordance with Governing Body policy.

Ratios for Early Years are specified and must be adhered to. Please refer to [Statutory Framework for the Early Years Foundation Stage](#)

For all other visits the visit leader, EVC and Head of Establishment must make a professional judgment regarding the number and suitability of staffing on an individual visit basis after consideration of the following factors:

- the type, level and duration of activity
- the nature and requirements of individuals within the group including those with additional needs
- the experience and competence of staff and other adults
- the venue, time of year and prevailing/predicted conditions
- the contingency or 'Plan B' options.

A visit must not go ahead where either the visit leader, EVC or Headteacher is not satisfied that an appropriate level of supervision exists.

Visit leaders, EVCs and Heads of Establishments often find it helpful to have 'a starting point for consideration'. Where departure from the starting point results in fewer staff the justification should be recorded as a note on EVOLVE.

Staff who are assigned to support the special needs of an individual cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

Staff and volunteers who work *frequently* or *intensively* with, or have regular access to young people or vulnerable adults, must undergo an enhanced CRB check as part of their recruitment process. For the purpose of this guidance:

- '*frequently*' is defined as 'once a week or more'.
- '*intensively*' is defined as 'four or more days in a month, or overnight'.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

Ratios and Effective Supervision

Ratios are a risk management issue, and should be determined through the process of risk assessment. It is not possible to set down definitive staff/student ratios for a particular age group or activity, although the law does specify minimum ratios for Early Years.

Some guidance documents do set out ratios, but these should be regarded as starting points for consideration rather than being definitive, as they may only be appropriate where the activity is relatively straightforward and the group has no special requirements. For example, the DfES publication HASPEV (1998) suggested the following “starting points”.

- School years 1-3, 1:6
- School years 4-6, 1:10/15
- School years 7 onwards, 1:15/20
- For visits abroad 1 adult to 10 pupils

Without special safeguards or control measures, these ratios will **not** be adequate to meet the needs of most residential or more complex visits.

The Early Years and Foundation Stage Statutory Framework sets out specific legal requirements for minimum ratios in this age group, which apply both indoors and on outings. These are complex, and include requirements about the qualifications of the staff.

They require a minimum of 2 adults with a group, including at least one person who has a current paediatric first aid certificate, with minimum ratios as follows:

- Age under 2, 1:3
- Age 2, 1:4
- Age 3+, 1:8 or 1:13 depending on setting, time of day and staff qualifications.

Remote Supervision

Young people must be supervised throughout all visits. Where they are unaccompanied by a member of staff or other responsible adult, e.g.. D of E expeditions, ‘down time’ in a shopping mall, etc. This downtime is known as ‘remote’ supervision.

‘Remotely supervised’ activities can bring purposeful educational benefits. The progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including managing risk, self-sufficiency, interaction with the public, social skills and decision making.

In addition to considering the benefits of the activity staff should also ensure that reasonably practicable safety precautions are taken.

The decision to allow remote supervision should be based on professional judgment taking into account such factors as:

- prior knowledge of the individuals (including their maturity and levels of responsibility)
- venue and conditions
- the activity taking place
- preparatory training
- the competence of the supervising staff
- the emergency systems in place.

When recording a remotely supervised visit on EVOLVE there must still be a named visit leader. This will be the member of staff that has made a professional judgment regarding the level of responsibility and maturity of the participants and where that member of staff has decided that it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. This should be recorded as a NOTE on EVOLVE.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

12 First Aid

For all visits there should be a responsible adult with a good working knowledge of first aid appropriate to the environment (e.g.. urban, remote, water, etc).

'Basic Skills' e.g. a 3 hour non-assessed course is generally suitable for routine urban visits, however the nature of the visit may indicate that a higher level qualification is appropriate, especially in circumstances where it is likely that access by the emergency services may be delayed.

Based on the nature of the particular visit the EVC (or visit leader) should make a professional judgment regarding the level of first aid required.

A first aid kit appropriate to the visit should be carried.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

13 Insurance

Advice regarding insurance may be sought from the Local Authority's Risk and Insurance section.

For visits abroad, additional travel insurance (sometimes referred to as school journey insurance) **must** be obtained by the school/establishment.

For all other visits it is the responsibility of the Team Manager, Visit Leader and Educational Visits Coordinator to determine whether additional insurance should be taken out. The team should particularly consider the need for additional insurance for residential activities or those involving adventurous activities or hazardous environments.

The responsibility for arranging adequate insurance cover rests with the team manager in conjunction with the organiser for each journey. The council will assist by putting schools in contact with appropriate providers if required. Application **must be submitted at least 8 weeks before commencement of the journey**. Contact the LA Risk and Insurance Section for further details.

If alternative insurance arrangements are proposed the policy must be agreed by the Risk and Insurance team and a copy submitted with the approval forms. Organisers should take the cost of insurance cover into account.

Administration of the insurance is dealt with by the Insurance Service on behalf of the Insurers.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland). All participants must hold a valid EHIC (European Health Insurance Card). See www.dh.gov.uk

Refer to: relevant section of [National Guidance](#) by using the search facility.

14 Transport

PRIVATE CARS

Where a private (staff/parent) car is to be used to transport young people then this must be approved by the Head of Establishment. A [PRIVATE CAR](#) Form must be completed and retained by the Establishment on an annual basis. (See appendix 3a and 3b)

COACHES

The LA does not 'Approve' coach companies. Whilst UK legislation ensures that coach companies are fit for public use the facilities available on coaches may vary. Liaising with other Establishments within the LA that have used a particular company (via a search on EVOLVE) will help to determine the level of service that may be provided. For further information please contact the LA Educational Visits Adviser.

MINIBUSES

Establishments that own or hire a minibus must have an operational policy in place for this.

Wirral Council states that teachers driving on behalf of their school need to hold a category D1 restricted licence (drivers who passed their driving test before January 1997 have this entitlement automatically on their licence) or a category D1. Drivers who passed after January 1997 do not have an automatic entitlement and to obtain a D1 they will need to undertake a driving test and pass a medical. This regulation, stated by Wirral Council will come into force by July 2013.

All drivers of minibuses must undertake the Wirral Council Minibus Training and Assessment Scheme (for more information contact the Road Safety Team) and keep that training current (3 yearly refreshers). This applies to pre & post January 1997 licence holders operating under the section 19 permit scheme as 'volunteer drivers'.

Although the DVLA state that, in certain circumstances, drivers holding a category B licence can drive a minibus, Wirral Council has decided that teachers driving a minibus on behalf of the local authority with only a category B licence DO NOT QUALIFY. Therefore, they must obtain a full D1 entitlement through the DVLA before driving.

For further information:

- Wirral Council Transport Section: 0151 666 3196.
- Wirral Council Road Safety Team: 0151 606 2501
- ROSPA '[Minibus Safety: A Code of Practice](#)' 2008

Refer to relevant section/s of [National Guidance](#) by using the search facility.

15 Farm Visits

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

Refer to EVOLVE National Library: '[Preventing or controlling ill health from animal contact at visitor attractions - Advice to Teachers](#)' and associated documents.

Refer to Farming & Countryside Education: www.face-online.org.uk

Refer to relevant section/s of [National Guidance](#) by using the search facility.

16 Water-Margin Activities

This section applies to:

Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle*, shallow* water. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment or water-going craft.

* 'gentle' means hardly moving at all.

* 'shallow' typically means up to the knees of the participants.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

At the outset the leader must decide whether the activity:

- a) Falls **within** the definition in bold above - in which case the guidance below applies.

or

- b) **Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and [Section 23](#) applies.

All staff involved in water-margin activities should be conversant with the guidance contained within [Group Safety at Water Margins](#). This document must be made available to all supervising adults in advance of the visit.

As with all visits where appropriate there should be an approved alternative 'Plan B' that could be used where conditions dictate and for which parental consent if necessary has been obtained.

LA approval is required for water-margin activities. The leader must have previous relevant experience and must have been assessed as competent to lead the activity by the EVC and/or Head of Establishment. Refer to relevant section/s of [National Guidance](#) by using the search facility.

17 Residential visits

The LA acknowledges the immense educational benefits that residential visits can potentially bring to young people and fully supports and encourages residential visits that are correctly planned, managed and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

To complete the appropriate forms see Appendices 1, 6, 7, 8, 9, 15 and 16

Refer to relevant section/s of [National Guidance](#) by using the search facility.

18 Overseas visits

The LA acknowledges the immense educational benefits that overseas visits can potentially bring to young people and fully supports and encourages overseas visits that are correctly planned, managed and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

For all visits it is essential that consideration is given to the following:

- a) Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- b) Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- c) Transport systems have been assessed as safe for use.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: www.fco.gov.uk ('Home' page, 'Travel & Living Abroad', 'Travel Information by Country'). All relevant FCO information should be circulated amongst the staff team.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See www.dh.gov.uk

For exchange visits:

- The LA has adopted the Outdoor Education Advisers' Panel national guidance document: [Young People's Exchange Visits](#). LA Establishments are required to adhere to all relevant aspects of this guidance. This document is on Evolve in the resources section.
- Refer to the British Council (Learning) www.britishcouncil.org
- To complete the appropriate forms see Appendices 1, 6, 7, 8, 9, 15 and 16
- Refer to relevant section/s of [National Guidance](#) by using the search facility.

19 Weather, clothing and survival

Where appropriate the leader must obtain and act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate to:

- The time of year, prevailing weather conditions, altitude and exposure to elements
- Likely changes in weather
- The experience and strength of the party
- The nature of the visit and environment.

When venturing away from immediate help leaders should consider the need for:

- Comfort, insulation and shelter for a casualty
- Comfort, insulation and shelter for the whole group
- Provision of emergency food and drink
- A torch
- A possible need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas)

It is primarily the responsibility of the Visit Leader in consultation with other staff where appropriate to modify or curtail the visit or activity (e.g. Plan B) to suit changed or changing circumstances. For example an over-busy lunch area, rain and rising water levels.

20 Swimming

The LA acknowledges the immense educational benefits that swimming activities can potentially bring to young people and fully supports and encourages swimming activities that are correctly planned, managed and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions

All swimming activities and venues must be included within the visit plan and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad where for example a hotel pool may be available. Please seek advice from the LA. Please note particular RM must be carried out by school if a visit of this type is being planned.

Young people must be supervised by a competent adult at all times whilst undertaking swimming activities. The following criteria apply:

Swimming pools (lifeguarded)

- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.
- For publicly lifeguarded pools abroad the Establishment's staff must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
- The Establishment's staff should not have responsibility for lifeguarding, unless the Establishment have a member of staff who is suitably qualified. **However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.**
- For swimming lessons, the LA Establishment should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

Hotel (and other) swimming pools

Approval to lead the activity will be required via EVOLVE.

Establishments must ensure they liaise with the Educational Visits Adviser before any visit is planned for Hotel (and other) swimming pools. The Establishment must notify the LA of this visit within a minimum of 8 weeks before the visit takes place.

Establishments should check the lifeguarding position in advance.

For free swimming activity

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

For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see www.lifesavers.org.uk **or**
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. (available from 2012) see www.lifesavers.org.uk

The role of the lifeguard is:

- To directly supervise the pool and the pool users, exercising appropriate levels of control. (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)
- If necessary, brief pool users in advance regarding rules (e.g.. no diving, running, etc.).
- To communicate effectively with pool users.
- To anticipate problems and prevent accidents.
- To intervene to prevent behaviour which is unsafe.
- To carry out a rescue from the water.
- To give immediate first aid to any casualty.

The above must be accomplished in the context of the Normal Operating Procedures and the Emergency Plan for the pool which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool.

Staff must be aware of the procedures in the event of an emergency and who will provide back up at the venue. Staff should also know if they have exclusive use of the pool as other pool users may increase the supervision role of your lifeguard.

If a young person holds an appropriate qualification then their role should be Emergency Lifeguard Action and supervision should remain the responsibility of the LA Establishment's staff.

Open water swimming (i.e. not in a swimming pool and not a 'water-margin' activity)

LA Approval is required via EVOLVE.

Particular consideration should be given to the following factors:

- Unknown locations and hazards, especially overseas.
- Changing environmental conditions.
- Supervisor complacency.
- Adherence to local advice.
- Preparation and knowledge of young people, i.e. is it a planned activity?

The designated lifeguard must be dedicated exclusively to the group and the location used must fall within the RNLI/RLSS definition of a 'safer bathing area'. Local advice must always be sought.

For free swimming activity

- A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see www.lifesavers.org.uk Note: this is for beach/sea only and not inland water.

For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRSTAC) or equivalent - see www.lifesavers.org.uk **or**
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. (available from 2013) see www.lifesavers.org.uk

Refer to relevant section/s of [National Guidance](#) by using the search facility.

21 Definition of an ‘adventurous activity’

Please contact the local authority if there is uncertainty over whether a particular activity requires LA approval.

The following activities are regarded as ‘adventurous’ and require LA approval:

- All activities in ‘open country’ (see below)
- Swimming (all forms, except as part of the Wirral Primary & Secondary School Swimming Programme)
- Water margin activities [Group Safety at Water Margins](#)
- Canoeing / kayaking
- Sailing / Windsurfing / Kite Surfing
- Rafting or improvised rafting
- Use of powered safety / rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including climbing walls)
- Abseiling
-
- Coasteering / coastal scrambling / sea level traversing
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- River / gorge walking or scrambling
- Camping
- Underground exploration
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- Shooting and archery
- Theme parks – where there is a range of water rides
- Off road cycling
- ‘Extreme’ sports
- High level ropes courses
- Trampolining
- Other activities (e.g. initiative exercises) involving skills inherent in any of the above

‘Open country’ is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the local authority if you think this might apply. For level of competence required to lead in open country refer to Duke of Edinburgh Policy and Guidance.

The following activities will **NOT** be approved by the LA:

These activities are not enriching educational experiences for young people in Wirral. There are a variety of other reasons as to why these activities are not approved by the LA. Should the school/establishment require more information please contact the Educational Visits Adviser.

- Paintballing
- High Ropes and Zip Wires with certain providers i.e. Go Ape
- All activities at Manley Mere except sailing
- Crocky Trail
- Any Adventure Playgrounds

For the purposes of LA approval, the following activities are not regarded as adventurous and therefore do not require approval. However, these activities must be supervised by a member of staff who has previous relevant experience and who in the opinion of the EVC and Head of Establishment is competent to supervise the activity:

- Walking in parks or non-remote country paths
- Bowling
- Chester Zoo
- Laser Quest
- Field studies – unless in the environments stated in ‘open country’
- Swimming – as part of the Wirral Primary & Secondary School Swimming Programme
- Tourist attractions
- Pedal go-karts
- Ice skating (rink)
- Farm visits
- Local traffic survey
- Museum, library, etc
- Physical Education and sports fixtures (other than in the above list)
- Football stadiums
- Theme Parks where there are no water rides

22 Adventurous Activities

This section is applicable to all adventurous activities except the following four activities. Separate guidance applies for these four activities:

[Water-based activities](#) - Section 23

[Open country activities](#) - Section 24

[Snowsports](#) - Section 25

[Overseas expeditions](#) - Section 26

The LA acknowledges the immense educational benefits that adventurous activities can potentially bring to young people and fully supports and encourages adventurous activities that are correctly planned, managed and conducted

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

The responsibility for the safety of participants in an adventurous activity will rest with either:

a) **An external provider** - see [Section 29](#)

The provider must hold an [LOtC Quality Badge](#) or complete a [Provider Form](#) (see appendix 1)

Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not a LOtC Quality Badge then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider the accompanying staff continue to retain a 'pastoral' duty of care.

or

b) **A member of your Establishment's staff** - see [Section 28](#)

This person must be specifically approved by the LA to lead the activity via EVOLVE.

To complete the appropriate forms see Appendices 6, 7, 12 and 15

23 Water-Based Activities

For clarification between water-margin and water-based activities see [Section 16](#)

The LA acknowledges the immense educational benefits that water-based activities can potentially bring to young people and fully supports and encourages water-based activities that are correctly planned, managed, and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

The following are not regarded as adventurous activities for the purposes of LA approval:

- Swimming in publicly lifeguarded pools - see [Section 20](#)
- Water-margin activities as defined in [Section 16](#)
- Commercial craft, tourist boat trips and similar activities for which young people would not normally wear personal buoyancy.

With the exception of the above, all other forms of water-based activities are regarded as adventurous activities, and as such require LA approval.

The responsibility for the safety of participants in an adventurous activity will rest with either:

a) **An external provider** - see [Section 29](#)

The provider must hold a [LOtC Quality Badge](#) or complete a [Provider Form](#)

Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not a LOtC Quality Badge then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider the accompanying staff continue to retain a 'pastoral' duty of care.

or

- b) **A member of your Establishment's staff** - see [Section 28](#)

This person must be specifically approved by the LA to lead the activity via EVOLVE.

In order to participate in water-based activities participants should normally be water confident. Participants who lack water confidence may still be able to take part subject to consideration of all factors including the activity itself and supervision arrangements. The level of water confidence of all participants must be known by the activity leader prior to the commencement of water-based activities.

Leaders should have knowledge of the water conditions/hazards (and potential changes) that might be encountered and prepare accordingly. Local advice must be sought where appropriate, e.g. coastguard, harbour master and other site users.

Personal buoyancy conforming to the appropriate National Governing Body must be worn at all times by all participants in water based activities except at the discretion of the activity leader where the activity:

- a) takes place in a swimming pool, **or**
- b) is 'swimming', **or**
- c) is an activity for which personal buoyancy would not normally be worn by young people.

24 Open-country activities

Open-country activities are regarded as 'adventurous' and therefore these visits require LA approval.

The LA acknowledges the immense educational benefits that open-country activities can potentially bring to young people and fully supports and encourages open-country activities that are correctly planned, managed, and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

For the purposes of LA approval, 'open-country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the LA Educational Visits Adviser if you think this might apply.

The responsibility for the safety of participants in an adventurous activity will rest with either:

- a) **An external provider** - see [Section 29](#)

The provider must hold a [LOtC Quality Badge](#) or complete a [Provider Form](#)

Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not a LOtC Quality Badge then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

or

- b) **A member of your Establishment's staff** - see below

This person must be specifically approved by the LA to lead the activity via EVOLVE.

The following minimum levels of technical competence apply where a member of the Establishment's own staff intends to lead an open-country activity:

- a) For leaders of walking groups outside the UK or Ireland please contact the LA for further guidance.
- b) For leaders of walking groups in mountainous terrain within the UK and Ireland
 - Mountain Leader Award (Summer or Winter as appropriate) www.mltuk.org **or**
 - A written statement of competence by an appropriate technical adviser - see [Section 28](#)
- c) For leaders of walking groups in summer conditions in non-mountainous hilly terrain

(Known variously as upland, moor, bog, hill, fell or down), with well defined obvious boundaries such as roads and coastlines. Where any hazards within it are identifiable and avoidable and where wild camping or movement on steep ground is not involved.

- Walking Group Leader Award www.mltuk.org **or**
- A written statement of competence by an appropriate technical adviser - see [Section 28](#)

d) For leaders of walking groups in terrain 'easier' than that defined in c)

The leader must demonstrate an appropriate level of competence. This may include one or more of the following:

- Countryside Leader Award. See www.countrysideleaderaward.org
- Sports Leaders UK Level 2 Award in Basic Expedition Leadership (BEL).
See www.bst.org.uk
- Completion of a suitable 'Leader Training' Course.
- A written statement of competence by an appropriate technical adviser see [Section 28](#)
- Evidence of recent and relevant experience which has been appropriately corroborated.
- An assessment of competence (written or implied) by the Head of Establishment.

25 Snowsports

The LA acknowledges the immense educational benefits that snowsport activities can potentially bring to young people and fully supports and encourages snowsport activities that are correctly planned, managed, and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities and the visit therefore requires LA approval.

There are advantages to snowsports taking place during term time as opposed to during the Establishment holiday period. These include: greater choice generally, less queueing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snowsport Establishment instructors (as opposed to 'casual' instructors), greater likelihood of English speaking instructors and considerable cost savings through avoiding high season (possibly allowing more young people to participate).

A member of staff intending to organise a snowsport visit (but not instruct, lead or supervise on snow) must hold the Snowsport Course Organiser Award (SCO), administered by Snowsport England www.snowsportengland.org.uk and must have previously accompanied at least one educational snowsports visit.

Young people may only participate in snowsports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports school. Establishments should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.

A member of staff intending to lead skiing or snowboarding (i.e. not using a ski school instructor) must be qualified as below and have been approved by the LA via EVOLVE- see [Section 28](#)

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

- The Alpine Ski Course Leader Award (ASCL) www.snowsportengland.org.uk **or**
- The Alpine Ski Leader Award (ASL) www.snowsportscotland.org **or**
- A statement of competence by an appropriate 'technical adviser' - see [Section 28](#)

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

- The Snowboard Leader Award (SBL) administered www.snowsportscotland.org **or**
- A statement of competence by an appropriate 'technical adviser' - see [Section 28](#)

See EVOLVE for the current good practice guidance on helmets for snowsport activities.

Pupils may only take part in off-piste activities if:

- a) The pupils are under the direction of a suitably qualified local instructor
- b) they remain within the designated controlled areas
- c) the off-piste activities are specifically included within the visit insurance policy, AND
- d) a NOTE is added to EVOLVE in advance of the visit confirming that the above criteria are/will be complied with.

Please note: Owing to unacceptable liability waiver requirements, currently LA Establishments must not use the following resorts: Vail, Beaver Creek, Breckenridge, Keystone and Heavenly Lake Tahoe, until further notice. For other resorts in USA or Canada, the Establishment must check the liability position prior to making a commitment.

Refer to relevant section/s of [National Guidance](#) by using the search facility.

26 Overseas Expeditions

The LA acknowledges the immense educational benefits that overseas expeditions can potentially bring to young people and fully supports and encourages overseas expeditions that are correctly planned, managed, and conducted.

Staff should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

Overseas Expeditions (for the purposes of this document) are defined as those which typically involve journeying in remote areas of the world and/or in developing countries.

There are stringent requirements on Overseas Expedition providers and Establishments may therefore need to allow up to 18 months for LA approval to be granted. A 'Note' (for the attention of the LA) should be added to the EVOLVE Visit Form as soon as possible during the planning stages.

Overseas Expeditions will only be approved by the local authority if the provider either:

- a) Holds an LOtC Quality Badge www.lotcqualitybadge.org.uk **or**
- b) Provides a statement of compliance with [Guidance for Overseas Expeditions, Edition 3](#)

For providers that do not hold a LOtC Quality Badge, 'Guidance for Overseas Expeditions, Edition 3' should be referred to when the proposal is initiated. This document contains information for both Establishments and providers and includes a checklist of vital aspects that **must** be considered prior to the Establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

When planning an expedition and selecting a provider, Establishments should particularly consider the educational aims of the venture, that appropriate progression takes place and that the requirements relating to 'Best Value' are met.

Visit leaders may find it beneficial to attend the one day course entitled 'Overseas Expeditions and Fieldwork: a Course for Teachers and Youth Leaders' organised by the Royal Geographical Society www.rgs.org/eac

To complete the appropriate forms see Appendices 1, 6, 7, 8, 9, 15 and 16

Refer to relevant section/s of [National Guidance](#) by using the search facility.

27 Emergency Procedures

Establishments should ensure that their Health and Safety policy includes off-site visits.

Staff involved in a visit must be aware of and adhere to their Establishment's policy on emergency procedures.

For visits that take place outside normal Establishment hours:

- A completed [Emergency Card – Visit Leader](#) (or equivalent) must be with the Visit Leader at all times, see appendix 4
- A completed [Emergency Card – Home Contacts](#) (or equivalent) must be with the emergency home contact(s) at all times, where access to EVOLVE is not possible. See appendix 5

In an emergency, if it is not possible to reach any of the designated Establishment emergency contacts, the leader should call the LA 24 hour emergency number - see Appendix 17 contacts

Refer to relevant section/s of [National Guidance](#) by using the search facility.

28 Approval of staff to lead an adventurous activity

PROCEDURE FOR OBTAINING APPROVAL

Staff who wish to lead (i.e. supervise or instruct) an adventurous activity, as defined in [Section 21](#), must first upload details and scanned copies of all relevant qualifications (e.g. instructor certificates, first aid, etc) to the 'My Details' section of their EVOLVE account.

The visit leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (e.g. dates, venues, numbers, etc). The ALF will then be embedded within the Visit Form for that particular visit.

On receipt of a Visit Form (and embedded ALF), the LA will view the proposed activity in the context of the leader's competencies and qualifications.

Where approval is not granted to lead the activity, the Visit Form will be returned to the EVC via EVOLVE, with an attached note. Where this is the case the activity must not take place.

CRITERIA FOR APPROVAL

Approval will normally be given where the leader of the activity has recent relevant experience, and:

- is appropriately qualified through the relevant National Governing Body, **or**
- has a 'Statement of Competence' from an appropriate 'technical adviser' – see below.

For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Body. For further clarification regarding a technical adviser 'Statement of Competence' please contact the LA.

In some cases approval may be granted where no qualification is held, but the person concerned is deemed by the LA to have a sufficient level of competence in addition to recent relevant experience.

In cases where no National Governing Body exists, the LA will make a decision based on factors which may include: technical advice, the leader's stated competence, observed competence, past experience, and attendance at training courses.

Approval will always be subject to a requirement that the leader must act at all times within the remit of his/her qualifications, and in accordance with National Governing Body Guidelines where these exist. Approval may also be subject to other conditions which will be specified by the LA on the Visit Form.

Where there is insufficient information for the LA to make a decision regarding approval, then the applicant may be asked to provide further information (e.g. evidence of awards, experience, and log book details, etc). In some cases a meeting with the applicant may be requested by the LA.

Approval to lead an adventurous activity is specific to the technical aspects of the adventurous activity detailed. It is not an indication in respect of other aspects of the visit such as general management and supervision skills, the assessment of which may be the responsibility of Head of Establishment and/or EVC.

29 Guidelines for using an External Provider

An 'External Provider' is defined as where there is an element of instruction, staffing, or guiding, for example:

- Activity Centre
- Ski Company
- Educational Tour Operator
- Overseas Expedition Provider
- Climbing Wall where instruction is provided by climbing wall staff
- Freelance instructor of adventurous activities
- Youth Hostel (where instruction is provided)
- Voluntary organisation (e.g. Scout Association), where instruction is provided

For the purposes of LA approval, **an External Provider is NOT a:**

- Youth Hostel (where accommodation only is used)
- Hotel, B&B, etc
- Campsite
- Museums, galleries, etc
- Tourist attractions
- Theme Parks
- Farms
- Coach, Train, or Airline company
- Swimming Pool
- Climbing Wall where instruction is provided by a member of your school/Establishment's
- 'Volunteer' instructor of adventurous activities

The decision about the use of an external provider is the responsibility of the visit leader, EVC, Headteacher and Head of Establishment.

Schools/Establishments should consider the requirements under 'best value' when selecting an external provider.

To confirm that all aspects of the operation of the provider are satisfactory, the schools/Establishment must ensure that either:

- a) The Provider holds an LOfC Quality Badge www.lotcqualitybadge.org.uk

or

- b) A 'Provider Form' has been satisfactorily completed by the provider

Note: If a Provider holds an [AALA licence](#) (and/or any other accreditation) but not a LOfC Quality Badge, then a Provider Form is still required.

For Providers that hold an LOfC Quality Badge www.lotcqualitybadge.org.uk

No further action is necessary, other than to check the suitability of the provider/venue in relation to the intended aims or learning outcomes for the particular group.

For Providers that do not hold an LOfC Quality Badge www.lotcqualitybadge.org.uk

PROCEDURE

- Download a [Provider Form](#) from EVOLVE.
- Complete the top section.
- Send Provider Form to the provider (email, fax, post).
- When the form has been returned check that it has been satisfactorily completed.
- Keep Provider Form on file together with all other relevant documentation.
- It is not necessary to attach the Provider Form to EVOLVE.

Important: If the Provider has made any alterations to the wording of the Provider Form or is unable to comply, then you must discuss this with the Provider, and if necessary seek advice from the LA prior to making a commitment with the Provider.

The Provider Form should be sent to the provider at the time of making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.

The satisfactory completion of a Provider Form does not necessarily signify that the service on offer will be appropriate for the young people from your Establishment. A pre-visit and recommendation from previous users will help you decide on its suitability.

In some instances, for example where a school/Establishment intends to use an 'external', **voluntary** individual for services, then this person may be regarded as a temporary member of staff.

The above procedure is not sufficient for Overseas Expeditions (i.e. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable. Please contact Wirral LA.

30 WHICH FORMS DO I NEED TO COMPLETE?

For all visits please ensure the EVC / Visit Leader refers to **Educational Visits and Offsite Activity Planning Checklist (see Appendix 16)**

	1	2	3	4	5
Visit Form	Non adventurous - Visits of less than one day in the immediate locality	Non adventurous - Visits of one day	Visits including an overnight stay	Visits of one day or less involving an adventurous activity	Visits including an overnight stay involving a adventurous activity
Provider Form (Not required if Provider has an LOtC badge)	'Evolve' will signpost the Establishment about whether or not you require a Provider Form	'Evolve' will signpost the Establishment about whether or not you require a Provider Form	'Evolve' will signpost the Establishment about whether or not you require a Provider Form	'Evolve' will signpost the Establishment about whether or not you require a Provider Form	'Evolve' will signpost the Establishment about whether or not you require a Provider Form
'Evolve'	Schools can determine their own planning and approval requirements but are strongly advised to use the Evolve system	Schools can determine their own planning and approval requirements but are strongly advised to use the Evolve system	Yes	Yes	Yes
MSH2 (Not required as an attachment on Evolve)	No	Yes See Appendix 12	Yes See Appendix 12	Yes See Appendix 12	Yes See Appendix 12
Parental Consent (Under 18) (Not required as an attachment on Evolve)	Not required but blanket consent form must be used if unsure, check with LA	Not required but blanket consent form must be used if unsure, check with LA	Yes See Appendix 6	Yes See Appendix 6	Yes See Appendix 6
Personal Consent (Over 18) (Not required as an attachment on Evolve)	Not required but blanket consent form must be used if unsure, check with LA	Not required but blanket consent form must be used if unsure, check with LA	Yes See Appendix 7	Yes See Appendix 7	Yes See Appendix 7
MSH1 (Not required as an attachment on Evolve)	No	No	Yes See Appendix 9	No	Yes See Appendix 9
Risk Assessment (M34) (RA must be submitted on Evolve)	Yes See Appendix 15	Yes See Appendix 15	Yes See Appendix 15	Yes See Appendix 15	Yes See Appendix 15

31 APPENDICES

- [Appendix 1](#) - External Provider Form for Providers who do not hold an LOtC Quality Badge
- [Appendix 2](#) - Event specific notes
- [Appendix 3a](#) - Use of a private car to transport young people – for staff
- [Appendix 3b](#) - Use of a private car to transport young people – for parents
- [Appendix 4](#) - Emergency Card (Visit Leader)
- [Appendix 5](#) - Emergency Card (Home Contacts)
- [Appendix 6](#) - Under 18 – Parental/Guardian Consent and Medical Information Form For Educational Visits, involving Overnight Stays and/or Adventurous Activities
- [Appendix 7](#) - Over 18 – Parental/Guardian Consent and Medical Information Form For Educational Visits, involving Overnight Stays and/or Adventurous Activities
- [Appendix 8](#) - Parent/Guardian Routine Visits Consent Form
- [Appendix 9](#) - MSH1 Overnight Accommodation Questionnaire
- [Appendix 10](#) - MSH2 Visit Checklist
- [Appendix 11](#) - Parental/Guardian Consent Form for Educational Visits which are not Hazardous and do not involve an Overnight Stay
- [Appendix 12](#) - Sun Awareness and Protection Guidelines for Educational Visits and Adventurous Activities
- [Appendix 13](#) - Risk Assessment Guidelines
- [Appendix 14](#) - M34 Risk Assessment Recording Form
- [Appendix 15](#) - Educational Visits and Offsite Activity Planning Checklist
- [Appendix 16](#) - List of Contacts

For completion by ‘external providers’ used by Wirral Local Authority schools/establishments

(Should you require any more support about the use of this form please find ‘Guidelines for using an External Provider’ in the Evolve resources section)

Providers that do not hold a LOTC Quality Badge and that are to be used by schools/school/establishments from the Wirral Local Authority, are required to complete and return this form in advance of the school/school/establishment making a commitment.

School/establishment..... Staff member in charge.....

Date(s) of visit..... Name of provider.....

The provider or tour operator providing services to the school/establishment named above is asked to give careful consideration to the statements below and sign in the space at the end of the form to indicate that the standard of service will meet the conditions listed. Please tick all specifications you can meet, indicate by a cross any you cannot meet, and write N/A against any specifications which do not apply to your provision.

Section A should be completed for all visits. Sections B (adventure activities), C (tour operators) and D (expeditions) should also be completed if applicable.

SECTION A - ALL VISITS

Health, Safety, and Emergency Policy

- 1. The provider complies with relevant health and safety regulations, including the Health and Safety at Work Act 1974 and associated regulations for visits taking place in the UK, and has a health and safety policy and recorded risk assessments which are available for inspection.
- 2. Accident and emergency procedures are maintained and records are available for inspection.

Vehicles

- 3. All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used.

Staffing

- 4. All reasonable steps are taken to check staff that have access to young people for relevant criminal history and suitability to work with young people.
- 5. There are adequate and regular opportunities for liaison between school/establishment staff and the provider’s staff and there is sufficient flexibility to make changes to the programme if necessary and the reasons for such changes will be made known to school/establishment staff.
- 6. The provider has never been dismissed from any employment or had a contract ended.

Insurance

- 7. The provider has public liability insurance for a minimum requirement of £5m of liability cover. £10m is the preferred amount of liability cover.

Accommodation (if provided)

- 8. UK accommodation is covered by a current fire certificate or advice has been sought from a fire officer and implemented, and a fire risk assessment has been completed.
- 9. If abroad, the accommodation complies with fire, health and safety regulations which apply in the country concerned.
- 10. There are appropriate security arrangements to prevent unauthorised persons entering the accommodation.
- 11. Separate male and female accommodation and washing facilities are provided and staff accommodation is close to participants’ accommodation.

12. **Wirral Council will not enter into a contract with any Provider that requires the signature by students or their parents, or by employees of the Council, of:**

- (a) **any waiver or other document purporting to restrict or exclude in respect of the signatory:**
 - (i) **the liability of any supplier of services related to the activity for any breach of a duty of care or any other legal duty owed to the participant in the activity ; or**
 - (ii) **the right to obtain a remedy from a supplier of services related to the activity in respect of any breach of a duty of care or any other legal duty owed to the participant ; or**
- (b) **any indemnity in respect of liability that may be incurred by any supplier (or any party connected with any supplier) for breach of a duty of care or any other legal duty owed to the participant.**

I confirm that our terms and conditions of business **do not** contain a requirement to sign a waiver or indemnity in these or similar terms and that we will not at any time during the term of the contract attempt to vary the contract in order to introduce such a requirement.

SECTION B - ADVENTURE ACTIVITIES AND FIELD STUDIES IN OUTDOOR ENVIRONMENTS

12. Adventure Activities Licensing Authority (AALA) Licence covering dates of visit YES OUT OF SCOPE (this will be dealt with by the provider)

13. If YES, AALA Licence number R

For AALA licensable activities in the UK, the specifications in this section are checked as part of the AALA inspection. However, providers licensed with AALA are asked to consider these specifications with respect to any activities or aspects of provision not covered by the licence.

Activity management

Activities Not Covered by AALA Licence Relevant to this visit		
ACTIVITY	INSTRUCTOR QUALIFICATION	RATIOS

- 14. The provider operates a policy for staff recruitment, training and assessment which ensures that all staff with a responsibility for participants are competent to undertake their duties.
- 15. The provider maintains a written code of practice for activities which is consistent with relevant National Governing Body guidelines and/or, if abroad, the relevant regulations of the country concerned.
- 16. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be undertaken, or staff have had their competencies confirmed in writing by an appropriately experienced and qualified technical adviser.
- 17. Where there is no National Governing Body for an activity, the provider has a Code of Conduct for that activity which is in line with current good practice within the UK, and this includes appropriate instructor competencies.
- 18. Participants will at all times have access to a person with an appropriate First Aid qualification. Staff are practiced and competent in accident and emergency procedures.
- 19. There is a clear definition of responsibilities between providers and visiting staff regarding supervision and welfare of participants.
- 20. All equipment used in activities is suited to task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary.

SECTION C - TOUR OPERATORS

Where a tour operator delivers services to school/establishments using other providers e.g.. ski school/establishments, transport operators or accommodation, the tour operator must ensure that each provider meets the relevant specifications outlined in Sections A and B of this form and that these providers operate to standards which meet the relevant regulations which apply to the country of operation.

- 22. Sections A and B of this form, as appropriate, have been completed to show that checks have been made. Records are available for inspection.
- 23. The Tour Operator complies with the package travel regulations, including bonding to safeguard customers' monies.
- 24. ATOL, ABTA or other bonding body name and numbers.....

SECTION D - OVERSEAS EXPEDITIONS



25. The provider complies with 'Wirral Guidance on visits abroad'

If any of the above specifications cannot be met or are not applicable, please give details:
Details of any other accreditation, e.g. with National Governing Bodies, tourist boards, etc.

DECLARATION

I hereby certify that I am an authorised signatory to enter into this Agreement and to bind the said company, firm, person or corporation to the terms and conditions herein.

Signed Date.....
Name (print)..... Position in organisation.....
Full name and address of company, firm, person or corporation.....
.....
Tel..... Fax..... E.mail.....

Appendix 2

EVENT SPECIFIC NOTES

What are the really important things we need to do to keep ourselves safe?

Visit details..... Carried out by Date

ISSUE Consider STAGED: Staff, Timings, Activity, Group, Environment, Distance	HOW TO MANAGE IT	WHO TO BE INFORMED		
		PARENTS	STAFF	PARTICIPANTS

You must also ensure that appropriate persons are aware of any Generic procedures, but these do not need to be repeated here

Appendix 3a

Volunteer Driver's Declaration

To: The Headteacher School

I confirm that I am willing to use my own vehicle for transporting students on Educational Visits.

I accept responsibility for maintaining appropriate insurance cover and have checked with my insurance company that students carried voluntarily are insured.

I have a current clean, valid driving licence.

I shall ensure that the vehicle is roadworthy in all respects.

I shall ensure that all passengers wear correctly fastened seat belts.

I shall at no time transport a single student, other than my own child, as part of any journey. (This section does not apply to any 17/18/19-year-old student transporting their peers.)

I agree to the terms and conditions outlined in this declaration and will operate within them. I have never been interviewed, cautioned or convicted of any offence that would render me unsuitable to work with young people.

I shall at no time transport a student or students while I am under the influence of alcohol or drugs.

Signed: Date:

Name and address:

.....

The Establishment/LA reserves the right at any time to request copies of any relevant documentation, including vehicle registration or ownership document, MOT certificate, insurance certificate, road tax or driving licence.

Persons regularly transporting children will be asked to provide any disclosure certification required by the school or employers policy. This is in order to ascertain that they have not been declared unsuitable to work with children and young people.

Drivers should retain a copy of this declaration reminding them of the school's expectations.

	Insurance cover required
For teachers, youth workers, or other LA employees	<i>'Use by the Policyholder in connection with the business of the Policyholder'</i>
For parents and other volunteers	<i>'Use for social, domestic and pleasure purposes'</i>

Parental Consent Form for a Student to be Transported in Another Adult's Vehicle

Schools may wish to obtain parental permission for students to be transported in other adults' cars by the use of a pro forma such as this:

There may be occasions when your child could be transported in the car of another adult associated with the school.

The conditions under which other adults agree to provide use of their car are as follows:

They:

- confirm they are willing to use their own vehicle for transporting students on Educational Visits
- accept responsibility for maintaining appropriate insurance cover and have checked with their insurance company that students carried voluntarily are insured.
- have a current clean, valid driving licence
- shall ensure the vehicle is roadworthy in all respects
- shall ensure all passengers wear correctly fastened seat belts
- shall at no time transport a single student, other than their own child, as part of any journey (this section does not apply to any 17/18/19-year-old student transporting their peers)
- agree to the terms and conditions outlined in this declaration and will operate within them
- have never been interviewed, cautioned or convicted of any offence that would render them unsuitable to work with young people
- shall at no time transport a student or students while they are under the influence of alcohol or drugs.

I give permission for my son/daughter/ward to be transported in the car of another parent within the requirements explained to me.

Signed: Date:

Name and address:

.....

Emergency Card (Visit Leader)

This 'card' must remain with the Visit Leader at all times on a visit

In the event of a significant incident, illness or accident that **does not** involve serious injury or fatality and/or **is not likely to attract media attention** the Visit Leader should seek advice from their Establishment emergency contact(s). This should normally include a member Senior Management of the Establishment.

In the event of an incident that **does** involve serious injury of fatality and/or **is** likely to attract media attention the Visit Leader should adopt the following procedure:

1. Assess the situation
2. Safeguard uninjured members of the group (including self)
3. Attend to any casualties
4. Call emergency services (if appropriate)
(999 or appropriate local number if abroad, Europe 112, North America 911)
5. **Contact the LA Emergency Contact Number** to report the incident and request assistance.

Wirral Council Emergency Contact

Be prepared to give: Your name and Establishment/Group
 Phone number & reserve phone numbers
 Exact Location
 Nature of Incident
 Number in the Group

You will be called back as soon as possible so try not to make outgoing calls until contact is made. You will be given advice and asked in what way the LA can do to support you.

- Contact your Establishment, EVC or Home Contact (see below) and seek further advice. If you are unable to do this the LA will contact your Establishment on your behalf
- If practicable delegate party leadership to the Deputy Leader in order that you can be contactable at all times and to enable you to co-ordinate all necessary actions
- You will be provided with a contact number to refer all press, media, parental or other enquiries to the LA and for continuing contact with the LA during the incident.
- Wherever possible prevent group members from using telephones, cameras, mobiles or going on-line until such time as this has been agreed by the LA
- Do not allow any member of the group to discuss liability with any other party.

When the incident is under control:

- Seek further and full details of the incident how and why it happened so far as can be established at this stage
- Maintain a detailed written log of all actions taken and conversations held, together with a timescale (It may be appropriate to ask someone else to carry this out on your behalf)
- Contact the British Consulate / Embassy if abroad.

Name	Home	Mobile
Establishment		
Wirral Council Emergency Contact	0151 666 5265	-

If the visit will be outside normal Establishment hours:

Establishment 'Home' Contact		
Head of Establishment / Chair of Governing Body (optional)		
Other/EVC		

Emergency Card (Home Contacts)

For visits that take place outside normal Establishment hours.

This 'card' or equivalent must remain with the Establishment emergency contact(s) at all times if access to EVOLVE is not possible.

The Establishment's Emergency Home Contact(s) should have all visit information including itinerary, venue details, names, medical information and emergency contact details for all participants including staff.

In the event of being contacted by the Visit Leader (or other member of staff involved in a visit) you should:

- Confirm the phone number at which the caller can be contacted back on
- Note their location
- Determine the nature of the emergency
- Determine the type of help required.
- Establish whether the Visit Leader has made contact with Wirral Council Emergency contact.

If the incident does not involve serious injury or fatality and/or is not likely to attract media attention:

- Provide the required assistance if possible
- Seek further advice or pass on details to other Establishment contacts who may be able to assist.

If the incident does involve serious injury or fatality and/or is likely to attract media attention:

- Inform the Visit Leader that someone will phone him/her back as soon as possible; from the Establishment and/or the LA.

It is the responsibility of the Visit Leader to contact the LA. However circumstances may prevent this. If you are not 100% positive that the LA has been contacted please contact Wirral Council Emergency Team and state that you require immediate assistance from the Emergency Response Team. Give brief details of the incident.

- Your details will be taken and you will be phoned back as soon as possible
- You should also contact the Head of Establishment (if this is not you)
- A Response Team will be brought into action to support the party, the Establishment and the parents. Teams of senior officers are briefed for this role and will provide continuous support from the moment the emergency occurs. The team would operate from the Emergency Control Centre and the Head of Establishment or a senior member of staff may be asked to join the team immediately
- The Head of Establishment should consider the appropriate time to contact the parents/guardians of the participants involved on the visit. Advice and support can be sought from the LA in dealing with this.
- The Response Team will form a continuous link with the affected group and depending on the level of emergency will send a senior officer to the incident location. The Response Team will direct all actions which may include providing links with the media, communicating with rescue agencies, tour operators and insurance companies. As appropriate the Response Team would arrange for the return of the party or arrange other transport where required
- You will be provided with a dedicated number to refer all press, media, parental or other enquiries to the LA and for continuing contact with the LA during the incident.
- The LA will give accurate and periodic information through press releases, will arrange interviews and will attempt to reduce media pressure from the incident, Establishment and parents. If appropriate support and counselling will be arranged for families, participants and staff.

Name	Home	Mobile
Head of Establishment		
Deputy Head of Establishment		
Wirral Council Emergency Contact	0151 666 5265	-
Chair of Governing Body (optional)		
Other/EVC		

Appendix 6

UNDER 18 - PARENTAL/GUARDIAN CONSENT AND MEDICAL INFORMATION FORM FOR EDUCATIONAL VISITS, INVOLVING OVERNIGHT STAYS AND/OR ADVENTUROUS ACTIVITIES

N.B. ALL SECTIONS OF THE FORM SHOULD BE COMPLETED BY THE PARENT/GUARDIAN

School/Organisation: _____

1. Details of Journey

Journey/visit to: _____

From: _____ Date/Time: _____ To: _____ Date/Time
I agree to my son/daughter/ward

Full Name: _____ Address: _____

_____ taking part in activities described. I acknowledge the need for obedience and responsible behaviour on his/her part.

2. Medical Information

a) Does your son/daughter/ward have any medical conditions? YES/NO

If YES, please give full details:

b) Is your son/daughter/ward taking any medicine? YES/NO

If YES, please give full details:

c) To the best of your knowledge, has your daughter/ward been in contact with any contagious or infectious diseases, or suffered from anything recently, that may become infectious or contagious? YES/NO

d) Is your son/daughter/ward allergic to any medication, insect bites, food etc? YES/NO

If YES to **c)** or **d)** please give details: _____

f) Has your son/daughter/ward received a tetanus injection in the last 3 years? YES/NO

g) Has your son/daughter/ward any special dietary requirements? YES/NO

If YES, please give details:

3. **Swimming**

Is your son/daughter/ward able to swim?

YES/NO

If YES, comment upon your child's swimming ability.

4. **Emergency Contacts (including family doctor)**

I may be contacted by telephoning the following numbers

Work: _____ Home: _____

My home address is: _____

If not available at the above, please contact:

Name: _____ Tel. No: _____

Address: _____

Name of family doctor: _____ Tel. No: _____

5. **Declaration**

I understand that the teacher/youth worker in charge of the group will be acting in 'duty of care' and in the event of an accident I agree to my son/daughter/ward receiving emergency dental, medical or surgical treatment which might include the use of anaesthetics and blood transfusions, as considered necessary by the medical authorities present.

I undertake to inform the organiser as soon as possible of any change in the medical circumstances of my son/daughter/ward between the date on which I completed this form and the commencement of the activity.

I understand the extent and limitations of the insurance cover provided and that Wirral Council is insured in respect of its legal liabilities only, and that there is no personal accident or other cover.

Parent/Guardian Signature: _____

Date: _____

This form, or a copy, must be taken by the leader on the activity. A copy should be retained by the contact teacher/youth worker at the school/youth club.

Appendix 7

OVER 18 - PARENTAL/GUARDIAN CONSENT AND MEDICAL INFORMATION FORM FOR YOUTH SERVICE VISITS, OVERNIGHT STAYS AND ADVENTUROUS ACTIVITIES

N.B. ALL SECTIONS OF THE FORM SHOULD BE COMPLETED BY THE YOUNG PERSON/ADULT AND SIGNED BY THEM

Items **4a** and **4b** should refer to the next of kin.

Youth Project: _____

1. Details of Journey

Journey/visit to:

From: _____ Date/Time: To: _____ Date/Time

Full Name: _____ Address: _____

I agree to taking part in the above mentioned visit and having read the information sheet, agree to my participation in any or all of the activities described.

2. Medical Information

a) I have the following medical conditions

Please give full details:

b) I am taking the following medicine

Please give full details:

c) To the best of my knowledge, I have not been in contact with any contagious or infectious diseases, or suffered from anything recently, that may become infectious or contagious? YES/NO

d) Are you allergic to any medication, insect bites, food etc? YES/NO

If YES to **c)** or **d)** please give details: _____

f) Have you received a tetanus injection in the last 3 years? YES/NO

g) Have you any special dietary requirements? YES/NO

If YES, please give details:

3. Swimming

Can you swim?

YES/NO

If YES, comment on your swimming ability:

4. Emergency Contacts (including family doctor)

a) My next of kin can be contacted by telephoning the following numbers:

Work: _____ Home: _____

My home address is: (If different from that of young person/adult)

b) If my next of kin is not available please contact:

Name: _____ Tel. No: _____

Address: _____

c) Name, address and telephone number of family doctor:

5. Declaration

I agree to receiving emergency medical treatment, including anaesthetic, blood transfusions, as considered necessary by the medical authorities present.

I undertake to inform the organiser as soon as possible of any change in my medical circumstances between the date on which I completed this form and the commencement of the journey.

I understand that Wirral Council is insured in respect of its legal liabilities only and that there is no personal accident, or other cover, unless I have been advised specifically by the organiser. Accidents may arise for which Wirral Council is not responsible. I may undertake to obtain suitable insurance to cover such eventualities.

Signed: _____ Date: _____

This form, or a copy, must be taken by the leader on the activity. A copy should be retained by the contact youth worker at the youth club.

Appendix 8

Parent/Guardian Routine Visits Consent Form

School/establishment: _____

Your son/daughter/ward name: _____

I hereby agree to my son/daughter/ward participating in routine visits off the school/establishment site. These visits might include the following, or similar, activities:

List typical activities here

These visits will normally take place at the following, or similar, locations:

List typical locations here

I understand that:

- such visits will normally take place within the school/establishment normal hours, but that if, occasionally, they are likely to extend beyond this, adequate advance notice will be given so that I may make appropriate arrangements for my son/daughter/ward return home;
- my specific permission will be sought for any visits beyond those listed above or which could involve commitment to extended journeys, times or expense;
- all reasonable care will be taken of my son/daughter/ward during the visit;
- my son/daughter/ward will be under an obligation to obey all directions given and to observe all rules and regulations governing the visit and will be subject to all normal school/establishment discipline procedures during the visit;
- I must inform the school/establishment of any medical or behavioural condition or physical disabilities that may effect them during the visit;

I understand the extent and limitations of the insurance cover provided and that Wirral Council is insured in respect of its legal liabilities only, and that there is no personal accident or other cover.

Full name of parent/guardian: _____

Signature of parent/guardian: _____ **Date:** _____

Address: _____

_____ **Tel:** _____

Overnight accommodation questionnaire

WIRRAL LA is considering your establishment as a venue for a visit as detailed below.

You must complete SECTION 2 of this form in order that we may consider the suitability of the venue for our use. *Failure to provide the requested information may mean we cannot consider the use of the venue.* This information is requested only on the grounds of the safety of the staff and persons in our control. Thank you for your assistance

SECTION 1 TO BE COMPLETED BY THE MEMBER OF STAFF ORGANISING THE VISIT			
Number of Pupils/Young People		Number of Staff Supervisors	
Period of visit (inclusive)		Number of days	
Requirements/special needs of the group which need to be considered when completing this form. (NB: Information may be included on separate sheets to be attached)			
Return address for the completed form:			

SECTION 2 TO BE COMPLETED BY THE ORGANISING BODY OR THE MANAGER OF THE PROPOSED VENUE	
Address of proposed venue	
Type of accommodation – Hotel/Boarding House/Campsite, etc.	
Name of Owner (s)	
Name of person in control of the venue	
Is this person resident at the venue?	

Answer all questions and circle Yes/No as appropriate

Has a Fire Risk Assessment been carried out?	Yes	No
If a fire risk assessment has been carried out, has it been reviewed within 12 months?	Yes	No
Our school/establishment may have individuals who require assistance in the event of an evacuation. Do you have the appropriate equipment, procedures and trained staff to ensure a safe evacuation?	Yes	No
Is the venue inspected by the Fire & Rescue Service and/or Local Environmental Health Department?	Yes	No
If YES, please supply details of the inspection	Yes	No
Have all recommendations/actions been completed?	Yes	No
If no to above, give details of outstanding actions and reasons why not completed.		

In the past 12 months has the Fire and Rescue Service responded to an automatic fire alarm actuation NOT caused by fire?	Yes	No
If yes, please give details		
In the past 12 months has the Fire and Rescue Service responded to an automatic fire alarm actuation CAUSED by fire?	Yes	No
If yes, please give details:		
If you have ANY relevant certificates for this venue, e.g. NICEIC Electrical Installation, Gas Certificate, or other inspecting bodies, please supply full details:		
Is your venue a member of ANY tourist body or other ratings groups (e.g. AA or the Tourist Board) please supply details?		
Does the venue in question have the following Circle Yes/No as appropriate		
Automatic Fire Alarm System	Yes	No
Emergency Lighting	Yes	No
Fire Extinguishers/hoses	Yes	No
Detailed fire procedures/drill available	Yes	No
Fire doors	Yes	No
Fire exit routes and final exits clearly identified	Yes	No
Is there a telephone available at all times	Yes	No
If no, are alternative communication means required?	Yes	No
Give details		
First Aid facilities	Yes	No
Qualified First Aider	Yes	No

Has this venue been used by Wirral LA on previous occasions?	Yes	No
If so, name of School, Group, etc		
Name of Organisers		
Date of visit		

Your Name		Signature	
Position		Date	

Visit Checklist

This is intended as a checklist for the person in charge to ensure that safety issues are considered prior to and immediately after your arrival at your destination. They should be subsequently adhered to by YOU and ALL PERSONS in your party.

Before you depart remember YOU are responsible for their well being and safety.

SECTION 1 BEFORE YOU DEPART

Forms – have the following forms been completed and authorised?			
MSH1	Yes	No	Date of Authorisation
Entered the visit on Evolve	Yes	No	Date of Authorisation
Parental Consent Forms for all pupils	Yes	No	
Risk Assessments	Yes	No	
Special Authorisation i.e. Jehovah's Witness	Yes	No	
INSURANCE			
Has insurance requirements been checked?	Yes		No
Personal Accident Insurance?	Yes		No
"Travel Type" Insurance?	Yes		No
Other (please specify)	Yes		No
HEALTH AND SAFETY Do you have the following for the proposed visit?			
			Comments
Trained First Aider	Yes	No	
First Aid Kit	Yes	No	
Accident Report Forms M13/Book	Yes	No	
Emergency Contact Names – Pupils, staff and volunteer helpers	Yes	No	
Smoke Detector (s)	Yes	No	
Educational Visits and Offsite Activity Policy	Yes	No	
Other (please specify)	Yes	No	

SECTION 2 AT THE LOCATION/PRE-INSPECTION

CHECK AND UNDERSTAND ALL EMERGENCY ARRANGEMENTS		
<ul style="list-style-type: none"> Rehearse Fire Evacuation procedures for the location immediately. Follow ALL the rules of the location plus any others you feel you require. This should include "No Smoking" in bedrooms. You may wish to consider a TOTAL "No Smoking" ban for the location. Remember: Priority MUST be given to fire prevention and to the prevention of injury/loss 		
Are fire extinguishers available?	Yes	No
Are they fitted with tamper evident devices?	Yes	No
Are fire hoses available?	Yes	No
Is there a fire alarm system in place?	Yes	No
Is emergency lighting fitted?	Yes	No

Are there clear instructions on action to be taken on discovery of a fire?	Yes	No
Are there clear instructions on action to be taken on hearing the fire alarm?	Yes	No
Are there clear instructions on location of assembly point?	Yes	No
Are there clear fire exit directional signs?	Yes	No
Are all emergency escape routes well lit and free from obstruction?	Yes	No
Check all fire doors open easily ?	Yes	No
Check all FIRE DOORS, including FINAL EXITS can be opened from the inside at all times WITHOUT THE USE OF THE KEY?	Yes	No
Are smoke detectors fitted?	Yes	No
Have you taken or fitted your own smoke detector?	Yes	No
Are first aiders and/or facilities available?	Yes	No

Do ALL persons know what they should do in the event of an emergency? <i>For example, who contacts the Emergency Services</i>	Yes	No
Have you briefed other persons in your group as to their responsibilities in your presence and in your absence?	Yes	No
Have you briefed the pupils/young people on general safety, discipline, etc?	Yes	No
Other guidance on specific activities may also be required, for example consumption of alcohol and the use of cooking/heating appliances, etc?	Yes	No
Give details of other guidance documents required:		
Have you identified all special needs of the group, including; dietary needs, allergies, medication and physical/medical needs?	Yes	No
Are you aware of and have you consulted other relevant guidance that may be available or has been brought to your attention? These include guidance on camping and caravan holidays. Such guidance MUST be adhered to:	Yes	No
Give details of additional guidance		
Does the Head Teacher or appointed person have full written details of the visit travel times to and from the destination?	Yes	No
Address and telephone number of the destination?	Yes	No
The names of all persons on the visit?	Yes	No
Contact address and telephone numbers of all parents/carers for pupils/young persons?	Yes	No
Contact address and telephone numbers of next of kin for all staff and volunteers?	Yes	No

If ANY of the above items are found to be incorrect and/or cause you concern, contact the relevant Senior Officer for advice

Your Name		Signature	
Position		Date	

SCHOOL LETTERHEAD

Dear Parent/Guardian

Outline precise details of the visit in a letter

Yours sincerely

Teacher in charge of visit
(or Headteacher, depending on school policy)

~~~~~

## **PARENTAL/GUARDIAN CONSENT FORM FOR EDUCATIONAL VISITS**

### **WHICH ARE NOT HAZARDOUS AND DO NOT INVOLVE AN OVERNIGHT STAY**

School Visit to: \_\_\_\_\_ Date: \_\_\_\_\_

I agree to my son/daughter/ward

Full Name: \_\_\_\_\_ Form: \_\_\_\_\_

taking part in the above mentioned visit(s) and having read the information sheet, agree to his/her participation to any or all of the activities described. I acknowledge the need for obedience and responsible behaviour on his/her part.

I understand that the teacher/youth worker in charge of the party will be acting in 'duty of care' and in the event of an accident I agree to my son/daughter/ward receiving emergency medical treatment, which might include the use of anaesthetic and blood transfusions as considered necessary by the medical authorities present.

I understand that Wirral Council is insured in respect of its legal liabilities only and that there is no Personal Accident, or other cover, unless I have been advised specifically by the organiser.

Accidents may therefore arise for which the Council is not responsible. Parents/Guardians may wish to obtain suitable insurance to cover such eventualities.

Signature: \_\_\_\_\_

Parent/Guardian

Date: \_\_\_\_\_

Tel No: \_\_\_\_\_

## Appendix 12

### **SUN AWARENESS AND PROTECTION GUIDELINES FOR EDUCATIONAL VISITS AND ADVENTUROUS ACTIVITIES**

There is increasing evidence that excessive sun exposure and particularly sunburn under the age of 15 is a major risk factor for skin cancer in later life.

Schools are asked to consider the following guidelines and formulate a policy which will protect children's skin when they are on an education visit or taking part in a hazardous activity.

#### Education

- to include sun awareness and sun safety issues in appropriate curriculum areas, particularly health and physical fitness projects. These issues should be discussed before the trip with pupils/young people and mentioned at meetings held with parents prior to visit.

#### Clothing

- Pupils/young people should be encouraged to take appropriate clothing with them on the trip:
  - 1) collared t-shirts
  - 2) long sleeves tops
  - 3) wide brimmed hats
  - 4) sun glasses

#### Sunscreens

- Pupils/young people should be encouraged to bring their own sunscreen. Teachers and other carers should ensure sunscreens are used correctly. It is strongly advised that a sunscreen with a SPF 15 rating should be the minimum protection used.
- Schools/Youth Groups should also inform parents that if group participants forget their own sunscreen the teachers/youth leader on the trip will use a specific sunscreen to protect the participant unless parents do not grant permission.

### RISK ASSESSMENT

A checklist for Risk Assessment for a visit or overnight stay:

#### Staffing

- expertise, qualifications and confidence
- number of the group
- age of the group
- special needs or medical conditions
- support staff
  
- Travelling Procedures
- meeting arrangements
- transport suitability
- safety when moving during the visit
- hazards on the way e.g. roads
- supervision and control
- arrangements for dismissal of the group
- contact with school/liaison person in case of emergencies
  
- Location of Visit
- hazards at the visit area e.g. lakes, roads
- supervision and control
- emergency procedures understood by all
- clothing, equipment suitable for venue and weather conditions
- visit suitable for age and experience
- emergency procedures

Department:

**Guidance on completing this form is available in the Health & Safety Management Arrangements for Risk Assessment**

- A. A copy of this risk assessment with Visit Specific Control Measures is to be added as an attachment to the Evolve Visit form.
- B. The contents should be shared with the EVC and Headteacher/Manager.
- C. Please ensure that the risk assessment actually **relates to this visit or offsite activity that has been provided below as an example**, i.e. the risk assessment reflects this activity/these activities, at this location/these locations, led by these staff with these young people. Account must be taken of any young people with particular needs and an informed judgement regarding weather and water levels (if relevant) is made. Please ensure that this information is shared and understood by all staff and participants involved in leading, supervising and participating in the visit.
- D. Submitting this risk assessment below (as an attachment on Evolve) without any alterations to suit the needs of the visit will not be accepted by the LA

|                       |                            |                          |
|-----------------------|----------------------------|--------------------------|
| Location or address   | Date assessment undertaken | Assessment undertaken by |
| Activity or situation | Review date                | Signature                |

| 1) Hazard (See appendix 2 - H&S Management Arrangements for Risk Assessment) | 2) Who can be harmed and how? (See appendix 2 -H&S Management Arrangements for Risk Assessment) | 3) Generic Controls – What generic controls exist to reduce the risk?<br><br>AND<br><br>(If applicable) Visit Specific Controls                                                                                                                                                                        | Risk Score<br>Consequence<br>X Likelihood | 4) Any further action;<br>This should be included in the action plan on overleaf |
|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|----------------------------------------------------------------------------------|
| <b>1. ENVIRONMENTAL ISSUES</b><br>e.g weather                                |                                                                                                 | <ul style="list-style-type: none"> <li>Weather forecast checked where appropriate</li> <li>Activities programme amended where necessary</li> </ul> <p><b>(If applicable) now please list controls that are specific to your visit</b></p> <ul style="list-style-type: none"> <li></li> <li></li> </ul> |                                           |                                                                                  |

|                                                                                                                                                                                                                                            |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| <p><b>2. TRANSPORT</b><br/>e.g. vehicles, drivers, arrival and departure of vehicles, breakdowns</p> <p><b>3. EQUIPMENT CLOTHING SUBSTANCES</b></p> <p><b>4. ACTIVITIES AND PROCEDURES</b><br/>e.g. Programme of activities, free time</p> |  | <ul style="list-style-type: none"> <li>• Driving hours limited, with back-up driver on long journeys</li> <li>• Seat Belts used at all times</li> <li>• Marshalling as group leaves coach, etc</li> <li>• Appropriate stops for eating and care arrangements en route</li> <li>• LA guidance on transport in private cars, minibuses, and public transport followed.</li> </ul> <p><b>(If applicable) now please list controls that are specific to your visit</b></p> <ul style="list-style-type: none"> <li>•</li> <li>• All clothing appropriate to the activities and location, including the use of weatherproof clothing</li> <li>• Appropriate footwear worn</li> <li>• Special equipment checked</li> <li>• All equipment appropriate to the activities and location</li> </ul> <p><b>(If applicable) now please list controls that are specific to your visit</b></p> <ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>• Detailed programme, including alternatives for bad weather</li> <li>• 'Down time' arrangements –careful planning</li> <li>• Adequate supervision at all times with a duty rota in place</li> <li>• Agree standards of behaviour and conduct</li> <li>• Equipment suitable for activities and abilities of pupils.</li> </ul> <p><b>If applicable) now please list controls that are specific to your visit</b></p> <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul> |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|



| 1) Hazard (See appendix 2 - H&S Management Arrangements for Risk Assessment) | 2) Who can be harmed and how? (See appendix 2 -H&S Management Arrangements for Risk Assessment) | 3) Generic Controls – What generic controls exist to reduce the risk?<br><br>AND<br><br>(If applicable) Visit Specific Controls                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Risk Score<br>Consequence<br>X Likelihood | 4) Any further action;<br>This should be included in the action plan on overleaf |
|------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|----------------------------------------------------------------------------------|
| 7. OTHER                                                                     |                                                                                                 | <ul style="list-style-type: none"> <li>• All relevant medical information of all participants obtained</li> <li>• All Appropriate medical arrangements, including first aid</li> <li>• Special potential health hazards associated with the site</li> <li>• Is it necessary to notify parents. Checks to be made</li> <li>• Have you provided appropriate information for parents</li> <li>• Meeting with parents</li> <li>• Parental Consent</li> <li>• Do you need and have they given their consent</li> <li>• Researched the area, site accommodation, company</li> <li>• Pre visit carried out</li> <li>• Full account taken of any pupils with medical and/or special needs .</li> </ul> <p><b>(If applicable) now please list controls that are specific to your visit</b></p> <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul> |                                           |                                                                                  |



| Risk Rating | Action Required                                                          |
|-------------|--------------------------------------------------------------------------|
| 17 - 25     | <b>Unacceptable</b> – stop activity and make immediate improvements      |
| 10 – 16     | <b>Tolerable</b> – but look to improve within specified timescale        |
| 5 – 9       | <b>Adequate</b> – but look to improve at review                          |
| 1 – 4       | <b>Acceptable</b> – no further action but ensure controls are maintained |

**Likelihood:**

- 5 – Very likely
- 4 – Likely
- 3 – Fairly likely
- 2 – Unlikely
- 1 – Very unlikely

**Consequence:**

- 5 – Catastrophic
- 4 – Major
- 3 – Moderate
- 2 – Minor
- 1 – Insignificant

- (1) List hazards **something with the potential to cause harm** here
- (2) List groups of people who are especially at risk from the significant hazards which you have identified
- (3) List existing controls here or note where the information may be found. Then try to quantify the level of risk **the likelihood of harm arising** that remains when the existing controls are in place based on the number of persons affected, how often they are exposed to the hazard and the severity of any consequence. Use this column to list the controls that you might take and develop all or some of that list into a workable action plan. Have regard for the level of risk, the cost of any action and the benefit you expect to gain. Agree the action plan with your team leader and make a note of it overleaf. If it is agreed that no further action is to be taken this too should be noted.

**(5) ACTION PLAN**

| Action required:                    | Responsible person | Completion date |
|-------------------------------------|--------------------|-----------------|
|                                     |                    |                 |
| Action plan agreed with (signature) | Date               |                 |

## ***(name of establishment)* Educational Visits and Offsite Activity Planning Checklist**

The questions below form part of the risk management process for educational visits. Please ensure this checklist has been read before the Headteacher approves the visit. Any visit should only go ahead if the answer to all relevant questions for your particular visit is 'YES'. This checklist can be used as a tool or aide-memoire to assist the EVC/visit leader in the planning process although alternative approaches to considering the relevant issues are equally as valid. **This checklist does not have to be submitted to the LA.**

*Note: This 'master' copy is in EVOLVE Resources. To reduce bureaucracy EVCs are encouraged to adapt this to suit their particular circumstances and then upload this to their establishment's own EVOLVE Resources section via the EVC Dashboard (orange 'cogs' icon on home page).*

### **In advance of the visit:**

1. Have the intended outcomes of the visit been clearly identified? (see Section 4 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
2. Is the visit appropriate to the age, ability and aptitude of the group?  yes
3. Has there been suitable progression/preparation for participants prior to the visit?  yes
4. Does the visit comply with any guidelines specific to your Establishment?  yes
5. Does the visit comply with any specific LA guidelines? (see relevant sections of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
6. If a member of staff is going to lead and/or deliver the adventurous activity (activities), have they been 'approved' by the LA? (see Section 28 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes  n/a
7. If using an external provider or tour operator, does the provider hold a LOtC Quality Badge (see [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)) or have they satisfactorily completed and returned a 'Provider Form'? (see Section 29 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes  n/a
8. Are transport arrangements suitable and satisfactory? (see Section 14 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes  n/a
9. If residential, have appropriate measures been taken to ensure the suitability of accommodation? (see Section 17 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes  n/a
10. If the visit is overseas, have appropriate additional measures been taken to ensure the suitability of activity and safety of participants? (see Section 18 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes  n/a
11. Has a pre-visit taken place? (normal procedure for most visits within the UK). If not, have appropriate additional checks been made?  yes
12. Do the adults in the party have the appropriate skills for the visit? (Check this carefully and arrange suitable training and/or briefing to clarify your expectations).  yes
13. Have any adult helpers (non LA employees) been approved by the Head of Establishment as to their suitability?  yes  n/a
14. Is the level of staffing sufficient for there to be an appropriate level of supervision at all times?  yes
15. Does the Visit Leader possess the necessary competence to lead the visit and is he/she comfortable with their role?  yes
16. Are all support staff aware of and comfortable with their roles?  yes
17. Are all helpers aware of and comfortable with their roles?  yes

18. **If appropriate**, have Event Specific Notes (ESN) been made and will these be shared with all relevant parties? (see Section 7 and ESN Form in Appendix 2 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
19. Is insurance cover adequate? (see Section 13 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
20. Does at least one member of staff know the participants that are being taken on the visit, including any behavioural traits?  yes  
Have participants been advised in advance about expectations for their behaviour?
21. If appropriate, are participants aware of any 'rules', and have sanctions to curb unacceptable behaviour been identified and agreed with participants and staff?  yes
22. Are participants aware of the nature and purpose of the visit?  yes
23. Are parents fully aware of the nature (including contingency plans) and purpose of the visit and has consent been obtained? (see Section 9 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
24. Have all relevant details been issued? (e.g.. itinerary, kit lists, etc?)  yes  n/a
25. Are staff aware of any medical needs and/or other relevant details of participants?  yes
26. Has parental consent been gained for staff to administer specific drugs/injections and if necessary have named staff received appropriate training?  yes  n/a
27. Are staff aware of any relevant medical conditions of other staff/helpers within the group?  yes  n/a
28. Does at least one responsible adult have a 'good working knowledge' of First Aid appropriate to the environment? (see Section 12 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
29. Is a first aid kit (appropriate to the visit) available? (see Section 12 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
30. Is there flexibility within the programme? Are there contingency plans that would be suitable in the event of changed or changing conditions, staff illness, etc. e.g.. 'Plan B', Have these plans been risk assessed and parental consent obtained?  yes
31. For journeys taking place outside the establishment's 'normal' hours, will an Emergency Card (Visit Leader) be with the leader and an Emergency Card (Home Contacts) be with the designated home contacts?  yes  n/a
32. Are full details of the visit at the LA establishment or recorded on EVOLVE and if appropriate with the establishment's Emergency Contact(s)?  yes
33. Are staff aware of the appropriate action to be taken in the event of accident, incident or emergency? (see Section 27 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
34. Is a weather forecast and/or other local information necessary, and are staff able to access this information and act upon it appropriately if necessary? (see Section 19 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes  n/a
35. If undertaking water-margin activities, has a copy of 'Group Safety at Water-Margins' been made available to all supervising staff in advance of the visit? (see Section 16 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes  n/a
36. A mobile phone is recommended for all visits. Are you aware of the reception in the area you are visiting?  yes  n/a
37. Will the group need waterproof clothing, boots or other equipment? If so, are procedures in place for checking the suitability of equipment?  yes  n/a
38. Does any specialist equipment conform to the standards recommended by responsible agencies?  yes  n/a
39. Have all financial matters been dealt with appropriately?  yes

40. Has the visit been approved by the Head of Establishment and EVC and in line with Governing Body policy (where appropriate)? (see Section 3 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes
41. If residential, overseas or involving adventurous activities has the visit been approved by the LA? (see Section 3 of the Wirral Council Policy and Guidance for Educational Visits and Offsite Activity)  yes  n/a

**During the visit**

42. Do all staff have a list of participants/groups? and emergency contact details and an Emergency Card (Visit Leader) if out of the establishment's normal hours?  yes
43. Does the establishment office have a list of the names of all participants, including adults? If out of hours does the home contact have these details and an Emergency Card (Home Contact)?  yes
44. Do staff have sufficient funds to allow for any contingencies?  yes  n/a
45. Do staff have any relevant literature, work sheets, clipboards, etc?  yes  n/a
46. Do staff have other items, e.g.. first aid kit, sick bags, litter sack, etc., if needed?  yes
47. Are participant numbers being checked at appropriate times?  yes
48. Has the group been warned of potential hazards in advance? If necessary, have specific arrangements been made to supervise these areas particularly carefully?  yes  n/a
49. Are participants aware of the procedure in areas where there is traffic? (e.g.. if walking, is it pairs, crocodile, groups? - may participants run? - are participants aware of the procedure at road crossings? etc.)  yes  n/a
50. Has a clear recall system been arranged if the group is working away from you? Do participants understand this and will they be able to respond effectively?  yes  n/a
51. If a rendezvous for the group has been arranged after a period of time does each participant and member of staff know exactly where and when to meet?  yes  n/a
52. Do participants know what action they should take if they become separated from the group?  yes
53. Is on-going risk assessment being conducted and if necessary the programme adapted to suit changed or changing circumstances (Plan B)?  yes

**At the end of the visit**

54. Are appropriate arrangements in force for the dismissal of participants?  yes
55. Has the Visit Leader reported back to the Educational Visits Coordinator?  yes  n/a
56. Has the group been debriefed and any relevant follow-up work completed?  yes  n/a
57. Have all loose ends been tied up e.g.. Paperwork, finance and thank you letters?  yes
58. Has the visit been evaluated and if appropriate have notes been made of points to be considered for future visits?  yes
59. Have all staff and helpers involved in the visit been thanked for their input?  yes

## Appendix 16

### Contacts

|                                                  |                                                                                                                                                                          |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>EVOLVE</b>                                    | <a href="http://www.wirralvisits.org.uk">www.wirralvisits.org.uk</a><br>Gaby Crolla – 0151 666 5255<br>Lorraine Maher – 0151 666 5203<br>Jackie Sheppard – 0151 666 5203 |
| <b>Wirral Health &amp; Safety Department</b>     | Jeanne Fairbrother – 0151 606 2211                                                                                                                                       |
| <b>Insurance Section</b>                         | Mike Lane<br>0151 606 2000 - Switchboard<br>0151 666 3413 - Direct number                                                                                                |
| <b>Wirral Council Emergency Number (24 hour)</b> | 0151 666 5265                                                                                                                                                            |

**National Guidance**

[www.oeapng.info](http://www.oeapng.info)

**National Library**

[www.national-library.info](http://www.national-library.info)

**LOtC**

[www.lotc.org.uk](http://www.lotc.org.uk)

**LOtC Quality Badge**

[www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**Outdoor Education Advisers' Panel**

[www.oeap.info](http://www.oeap.info)