



A SUMMARY OF EAST RIDING OF YORKSHIRE COUNCIL'S

GUIDANCE FOR THE MANAGEMENT AND LEADERSHIP OF OFFSITE VISITS



This summary should only be used as a basic introduction to the leadership and management of offsite visits.

Visit leaders and managers should also refer to the detailed online guidance via <http://www.eriding.net/all-ages/educational-visits/visits-guidance/>

Visits Guidance – Summary of Key Points

– full guidance at <http://www.eastriding.net/all-ages/educational-visits/visits-guidance/>

Chapter 1 - Types of visit and planning/approval procedures

1. Categories of visits:

	Description	Notify managers using:	Submit before visit:	Approved by:	Final Authorisation by:
Cat 1	Day visits (Frequently repeated/recurring)	Day visits form or ROVER	2 wks	EVC (schools) Other managers? (non schools)	Headteacher (schools) Line Manager (non schools)
Cat 2	Day visits (one off/occasional)	Day visits form or ROVER	2 wks	EVC (schools) Other managers? (non schools)	Headteacher (schools) Line Manager (non schools)
Cat 3	UK residential	ROVER only	6 wks	EVC + Gov + Head (schools) Managers (inc Line) (non schools)	LA Visits Officer (schools) LA Officer (non schools)
Cat 4	Overseas	ROVER only	6 wks	EVC + Gov + Head (schools) Managers (inc Line) (non schools)	LA Visits Officer (schools) LA Officer (non schools)
Sub Cat "A"	High risk activities and environments	ROVER only	6 wks	EVC + Gov + Head (schools) Managers (inc Line) (non schools)	LA Visits Officer (schools) LA Officer (non schools)
Academies (as above)	As above	As above	School policy	EVC (Cat 1/2) Gov + LA Visits Officer (Cat 3/4/A)	Headteacher (Academy)

2. Characteristics of Cat "A" high risk activities and environments

Risk of serious harm (e.g. most adventurous activities); unfamiliar/unpredictable environments (e.g. most waterbased activities); require specific leader qualifications (e.g. hillwalking); require specialist equipment or clothing (e.g. rock climbing); involve remote/challenging locations (e.g. orienteering); involve remote or indirect supervision (e.g. Duke of Edinburgh expeditions); involve young people with challenging behaviour/additional needs.

3. **ROVER Online access via <https://www.eastriding.gov.uk/eforms/>** . Managers can view all visit records on ROVER > "View All Visits" > "All Establishment Visits"

4. ROVER passwords (new/reset):

Contact LA Ed Visits Officer (taff.bowles@eastriding.gov.uk) to request new/reset password

5. Approval Responses

- "Not Approved" = significant changes needed
- "Outline Approval" = basically OK but needs minor changes or more information
- "In-House Approval" = approved by internal managers (final authorisation for academies)
- "LA Approved" = approved by LA managers

Chapter 2 - Outline and Objectives of Visit

- There should be a **defined purpose** for any proposed offsite visit.
- School visits in particular should have **clearly stated and justifiable educational objectives**.
- Insurance companies make clear that any **insurance cover provided through the LA might not be valid for visits that do not have justifiable objectives**.
- **A clear understanding of the visit objectives by all group members, parents/guardians and staff helps to maximise the learning potential and benefits of a visit.**

Chapter 3 - Selection and inclusion of young people

- Every effort should be made to **ensure that offsite visits and activities are available and accessible to all** who wish to participate, irrespective of special educational or medical needs, disability, ethnic origin, gender, or religion.
- **Managers and visit leaders should be aware of the requirements of the Equality Act**, and that reasonable adjustments are made to include all young people on visits.
- Every reasonable effort should be made to **find a venue that is both suitable and accessible** and that enables the whole group to participate fully and be actively involved.
- It is important for visit organisers to **plan carefully ahead to take account of the needs of each individual** in the group.
- **Staffing ratios may need to be increased** for visits involving young people who are disabled or have special educational/behavioural needs.
- **A decision to exclude a young person from a visit should never be taken lightly**, and only after extensive consultation with all those who have responsibility for the young person.
- **It may be reasonable to exclude a young person where their behaviour presents a significant, unmanageable and unacceptable risk** to the health, safety and welfare of either themselves, or other members of the group, or the leaders.
- Careful consideration should be given to the inclusion of young people who are related to the Visit Leaders or who are not members of the school/establishment. **It is important that leadership responsibilities are not compromised.**
- **Visit leaders should obtain up to date details of all group members' medical/special needs** (including any medication taken), and ensure that all leaders are informed of relevant information that might affect the safety and welfare of group members.
- **Visit leaders should be aware of, and comply with, the latest national guidance on administering medicines.**
- **Visit leaders should carry with them a full up to date list of all group members (including Leaders) together with their parent/guardian/emergency contact details.** This list should also be left with the designated Emergency Home Contact(s) and other relevant managers (such as the Educational Visits Coordinator, if applicable) before departure.
- **For further information, see the Outdoor Education Adviser Panel national guidance:**
Access via <https://oeapng.info/>

Chapter 4 - The Overall Group Leader (or Visit Organiser)

- **The Overall Group Leader is the main “Visit Organiser”, and is the person with overall responsibility** for the planning, management, supervision, and conduct of a visit.
- **Every offsite visit must have a named and specified Overall Group Leader.** If this role changes during a visit, a clear handover to a designated deputy should be made. The Deputy should be suitably experienced and competent to take over the role if necessary.
- **The Overall Group Leader must be assessed and approved as suitable and competent to fulfil their role and responsibilities by the Senior Manager/Headteacher.**
- **Being competent means that the Leader has demonstrated the ability to operate to recognised standards of good practice, and has sufficient relevant experience and knowledge of the group, the activity and the venue.**
- **Managers/Headteachers might reasonably expect new Overall Group Leaders or Deputy Leaders to have demonstrated their competence previously as Assistant Leaders on several similar visits.**
- **Staff who lead educational/offsite visits should record and regularly update details of their visit leadership qualifications, training, and experience on ROVER online.** This database enables managers to check staff qualifications/experience, and to make objective judgements regarding the competence of staff to lead visits.
- **Where a Leader wishes to lead an adventure activity, their competence should be confirmed by a robust verification process, such as:**
 - holding a National Governing Body leadership/coaching award at an appropriate level.
 - being "signed off" by a suitably-qualified Technical Adviser appointed by the employer.
- **The Overall Group Leader must use and follow their employer’s policies and guidance** (and relevant internal policies and procedures) when planning and leading visits.
- **The Overall Group Leader should be aware of their duty of care towards all group members,** and should fully understand their role and responsibilities as the visit leader.
- **The Overall Group Leader should ensure that visits are planned carefully beforehand and that risk assessments are suitable and sufficient.**
- **The Overall Group Leader should record and submit details of planned visits to all relevant managers, and ensure that visits are correctly approved and authorised before departure.**
- **Well-trained and experienced support staff should be able to lead visits under the direction and remote supervision of a teacher** (who will still have overall responsibility for the learning outcomes).
- **For further information, see also the Outdoor Education Adviser Panel national guidance webpages:**
Access via <https://oeapng.info/>

Chapter 5 - Deputy, Assistant and Volunteer Leaders (including competence, DBS checks, and first aid)

- Overall Group Leaders must ensure that all assistant and adult volunteers are suitable and competent to undertake their responsibilities and that they fully understand and accept their roles and responsibilities. A specified Deputy Leader should normally be appointed who is suitable and competent to deputise, and take over full responsibility from the Overall Group Leader, if necessary. Assistant Leaders assist the Overall Group Leader in undertaking leadership responsibilities during an offsite visit. If the main group separates into smaller operating groups, each group should be under the charge of an adult leader with suitable experience and competence.
- **Adult volunteer leaders can play an important role in providing additional support and supervision** during offsite visits and activities. Normally parents and volunteers cannot be expected to take on the same level of responsibility as employed members of staff, but they should be seen as an integral part of the leadership team, with clearly defined roles and responsibilities.
- All Visit Leaders should be assessed by Managers/Headteachers to ensure that they are suitable and competent to properly fulfil their roles and responsibilities. **Managers/headteachers should be able to access an up-to-date record of each leader's relevant qualifications, training and experience** so that they can make informed and objective judgements regarding each leader's competence and suitability to lead visits. The ROVER online database is the recommended means of recording this information as it enables all managers to easily check the information online.
- **Managers/headteachers have a responsibility to ensure that all adults involved in the supervision of children during offsite visits and activities are suitable people to work with young people**, and pose no threat to those in their care. This might require checks from the Disclosure and Barring Service (DBS), especially if volunteers are not under the supervision of staff members.
- **A specific risk assessment needs to be made for each visit to decide the appropriate number of first aiders, and the levels of training/qualification required.** It is recommended that all offsite visits should include at least one adult leader with an appropriate level of first aid training and an up-to-date qualification. In most circumstances, 6-8 hours of emergency first aid training is the minimum training recommended for leaders during offsite visits. The Statutory Framework for the Early Years Foundation Stage requires that there is at least one person on outings who has a current paediatric first aid certificate.
- For visits where other external first aid provision is available and qualified first aid assistance is available to respond immediately – no first aid training may be necessarily required for accompanying group leaders but adequate external cover must be available. **Consideration should also be given to whether adequate first aid provision is available during the journeys. Appropriate first aid equipment should be readily accessible at all times** and leaders are advised to check first aid kits before each visit to familiarise themselves with the contents and ensure that nothing is missing.
- **All visit leaders must bring to the Overall Group Leader's attention to any risk they feel is not acceptable.**
- **For further information, see also the Outdoor Education Adviser Panel national guidance webpages:**
Access via <https://oeapng.info/>

Chapter 6 - Staffing Ratios and Effective Supervision

- **Effective supervision is of primary importance in maintaining the safety and welfare of young people during offsite visits.** The Manager/Headteacher has the overall responsibility and duty of care to ensure that groups are adequately and effectively supervised at all times by an appropriate number of responsible adults, who have been assessed and approved as suitable and competent to carry out their roles.
- **The legal framework does not lay down specific staffing ratios for offsite visits and activities, but the overall responsibility for deciding appropriate staffing levels rests with the Manager/Headteacher,** after consultation with other managers (for example, in schools - the Educational Visits Coordinator) and the Overall Group Leader, as part of the risk assessment and management process.
- There are so many variables involved in any visit that it is not helpful or practical to be too prescriptive. **The guidance set out below is therefore based upon general recommendations rather than precise requirements.** Whilst these recommendations are based upon established and recognised good practice, each visit must be individually risk assessed, and judgments regarding supervision levels should be made according to each circumstance.

Category 1 and 2 (Day) Visits

The Framework for Early Years Foundation Stage states that a full risk assessment must be undertaken of each outing, and the following statutory minimum staffing ratios must be adhered to. However, some groups may need a higher ratio (in many cases 1:2 or even 1:1) according to the risk assessment.

- A minimum of 2 adults, including at least one person who is a teacher and one who has a current paediatric first aid certificate.
- Children aged <2 1 adult for every 3 children
- Children aged 2 1 adult for every 4 children
- Children aged 3+ 1:8 or 1:13 depending on setting, time of day and staff qualifications

Other age groups:

- School yrs 1 to 3 (approx age 5 – 7) 1 adult for every 6 young people
- School yrs 4 to 6 (approx age 8 – 10) 1 adult for every 15 young people
- School yrs 7 to 11 (approx age 11 – 15) 1 adult for every 20 young people
- School yrs 12 to 13 (age 16+) may be able to use a lower ratio, according to the risk assessment

Category 3 (UK Residential) Visits

- A minimum of 2 adults
- 1 adult for every 10 young people.
- Mixed gender groups should normally have at least 1 male and 1 female leader.

Category 4 (Overseas) Visits

- A minimum of 3 adults
- 1 adult for every 10 young people.
- Mixed gender groups should normally have at least 1 male and 1 female leader.

All subcategory “A” Visits involving Hazardous Activities or Environments

- A minimum of 2 adults
- 1 adult for every 10 young people
- For hazardous activities, the staffing ratios often need to be higher than the standard ratios above, and should normally comply with the ratios recommended by each activity’s National Governing Body (see Instructor matrix in Appendix VGA 8.1 “Adventure activities staffing requirements”)
- Staff should possess the relevant National Governing Body qualifications, where required.
- For hazardous activities that are led by external providers (e.g. instructors from a residential outdoor activity centre), it is good practice, wherever possible, to ensure that a Group Leader is available to accompany each activity group.

- **Regular head counts of young people should take place** throughout a visit, especially before leaving a venue.
- **It is useful to establish “buddy systems” within the group** – this encourages small groups to be responsible for checking on each others’ presence and welfare, and provides another level of supervision.
- In some circumstances (e.g. visits to cities) **group members may be asked to carry some form of contact card/bracelet** with the name of their school/organisation, the accommodation base, and an emergency contact number in case they get lost or separated from the group.
- **Particular consideration should be given to the supervision of “downtime” or recreation time.**
- **All adventurous activities and expeditions must be supervised by suitably trained and qualified leaders.**
- **When supervision is remote, group members should be sufficiently trained and assessed as competent** for the level of activity to be undertaken, including first aid and emergency procedures. The visit/activity leader should be satisfied that the group members have acquired the necessary skills, experience, confidence, physical ability and judgement to operate safely without direct supervision.
- **All leaders should be fully briefed regarding their roles and responsibilities.**
- **For further information, see also the Outdoor Education Adviser Panel national guidance webpages:**
Access via <https://oeapng.info/>

Chapter 7 - Selection and suitability of accommodation or venue to be visited

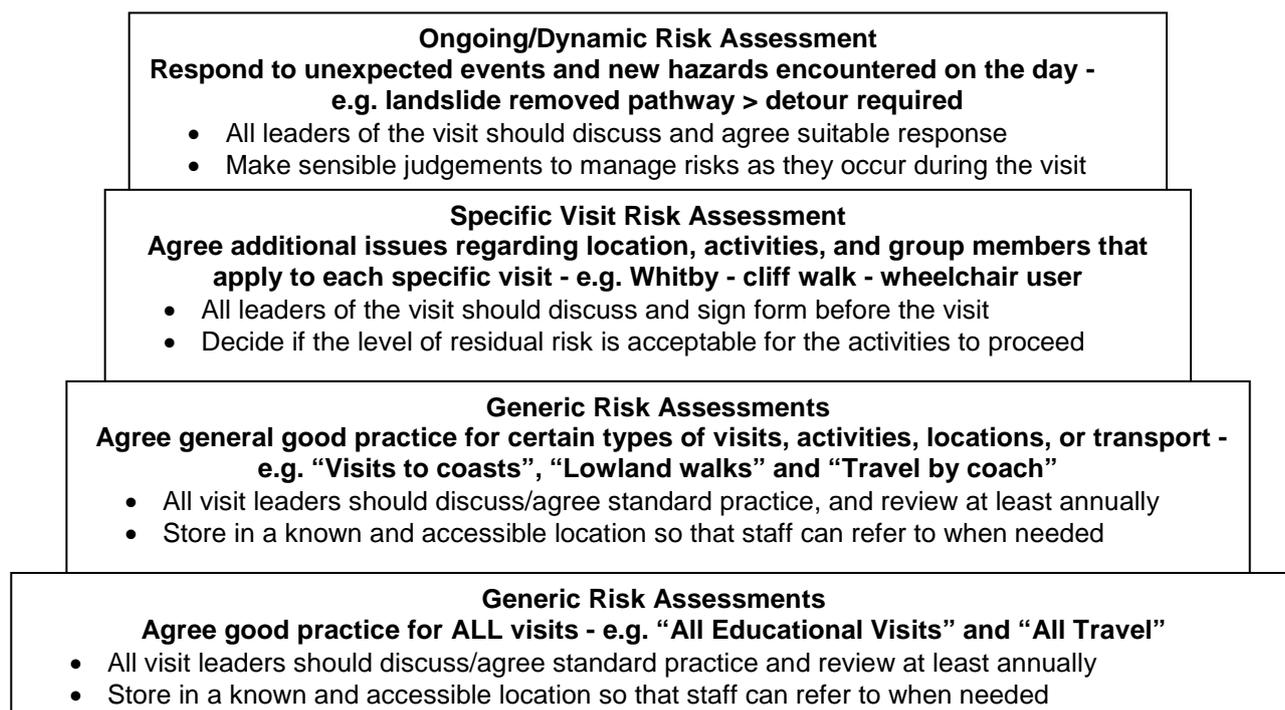
- As part of the overall risk assessment process, and in keeping with their legal duty of care, **the Overall Group Leader must take reasonable steps to check that any accommodation used, and any venues that the group plans to visit, are suitable, satisfactory, and acceptably safe.**
- **Evidence of the standard and safety of services provided can be obtained by using one or more of the following means:**
 - **check the provider’s website** for relevant information and assurances
 - **check any literature** that has been provided by the organisation for visiting groups
 - **check if the provider has a Learning Outside the Classroom (LOtC) Quality Badge.** It is not usually necessary to ask for further assurances regarding safety standards if the provider has already been inspected and awarded an LOtC Badge, but it might still be useful to visit the venue or request other information as part of the visit planning.
 - **email/write to the manager** of the organisation to request information and assurances
 - **ask the manager of the company/organisation to complete a Provider Statement Form (EV2)** – see appendix VGA 7.1;
 - **carry out a pre- visit inspection;**
 - **carry out an on-site visual inspection on arrival**, and ongoing checks during the visit;
 - **use experience from previous visits by the same leader;**
 - **use experience from previous visits by other groups** or other leaders from the same school/establishment.
- **It is important to obtain written assurances that:**
 - **third party providers have adequate liability insurance;**
 - **accommodation or venues visited are managed safely and are suitable for the group;**
 - **activities are led by staff who are appropriately qualified and competent, and that adventure activities are safely managed and correctly licensed (if applicable);**
 - **third party providers have carried out appropriate risk assessments.** It is not normally necessary to ask external providers to send copies of their own risk assessments. However, it may be helpful for the visit organiser to read through relevant sections of the organisation’s risk assessments to inform their own risk assessment. Many providers provide an information pack for visiting group leaders to assist them with their planning, and this might provide sufficient information and assurances regarding the standard of services. If any activity will be delivered by the visit leaders themselves, all significant risks must be identified and assessed, with appropriate control measures implemented.
- **Wherever reasonably possible, the Visit Organiser (and, perhaps other group leaders too) should undertake an exploratory visit to inspect and familiarise themselves with the accommodation to be used and venues to be visited.** If it is not reasonably practicable for an exploratory visit to be undertaken beforehand (e.g. for some overseas visits), Group Leaders should obtain adequate information and assurances from the travel company/tour operator/provider regarding the safety and suitability of the planned accommodation and travel arrangements (the EV2 Provider Statement form can sometimes be used for this purpose and it may also be valuable to seek impartial advice and guidance from previous users of the accommodation/venue). Leaders should be particularly alert to hazards that become apparent at venues that they have not been able to visit or check beforehand.
- Leaders should be aware that residential visits normally involve a greater degree of planning and preparation by virtue of their extended nature, and the broader implications of welfare issues. **A record of the address and contact details of any residential accommodation used should be left with the Emergency Home Contact(s)**, and this information should also be recorded and accessible, via ROVER online, to the Headteacher/Manager, Governors, and Local Authority.
- **For further information, see also the Outdoor Education Adviser Panel national guidance webpages:**
Access via <https://oeapng.info/>

Chapter 8 - High Risk Activities and Environments (including water- based activities, farms, and snowsports)

- **Leaders who organise visits that involve high-risk activities and environments must be aware that such visits normally require a greater degree of planning and preparation by virtue of their complexity and unpredictability.**
- **All Category 1 and 2 (Day), Category 3 (UK Residential) and Category 4 (Overseas) visits that involve high risk activities and environments should be recorded as subcategory “A” and must be assessed and approved by the Senior Manager/Headteacher, other relevant managers, and the Local Authority.**
- **For any visit involving adventure activities that are provided commercially to young people (aged under 18), the Leader must first check if the activity provider is correctly licensed, and has appropriate safety management procedures in place.** Commercial adventure activity providers are legally required to possess a current Adventure Activities Licence, issued by the Adventure Activities Licensing Service.
- **For all adventurous and other high-risk activities, managers should check that the leaders are competent to supervise the young people in the activity/environment.** Competence derives from knowledge, experience, training and personal qualities, and may be evidenced by holding the relevant National Governing Body (NGB) award (with evidence of recent leadership experience) where appropriate. All East Riding staff who intend to lead adventurous activities (mountain walking, climbing, canoeing, sailing, caving etc.) for young people should first be approved and added to the list of ERYC register of Approved Adventure Activity Leaders.
- **It is good practice for Visit Organisers to seek technical or local guidance**, especially if the leaders are relatively inexperienced, or if they are undertaking activities or visiting places which they are less familiar with, or which are prone to sudden change (e.g. coastal or river locations – it is important to be aware of tidal conditions, or the behaviour of local streams rivers in response to heavy rain).
- **Recent tragic accidents have underlined the importance of having a previously risk assessed “plan B”** to provide alternative activities if the original planned activity becomes unsuitable or cannot be delivered for some reason.
- **Visit leaders should be familiar with the relevant generic risk assessment(s) for any high-risk activity/environment, and should also carry out their own specific visit risk assessment for the venue, activity and group members.**
- **It is important that leaders are aware of all the potential dangers of bathing in open waters – especially of cold, deep, or moving water.** Leaders who are planning activities in or near water should have relevant experience and competence. Swimming or bathing in the sea or other natural waters is a potentially dangerous activity, and should only be undertaken at appropriate locations, and when organised and supervised by staff who are suitably experienced and competent.
- **Visits to farms can provide valuable educational experiences for young people, but most should be classed as category “A” (involving high risk environments)**, especially if they involve working farms. This is due to the nature of activities, vehicles, chemicals, and machinery on many farms, and also to the possible risk of infection from farm animals.
- **Ski visits can be more complicated to organise and lead than many other types of visit, and visit organisers should be competent and experienced leaders.** It is recommended that all new visit organisers are trained and qualified as Ski Course Organisers (SCO courses are provided by Snowsport England), or at least attend a Ski Visit Leader training course provided specifically by the LA. Unsupervised free-skiing should not normally be permitted. Visit leaders should ensure that alternative activities with appropriate supervision are arranged outside the instructed sessions.
- **For further information, see also the Outdoor Education Adviser Panel national guidance webpages via www.oeapng.info**

Chapter 9 - Risk Assessment and Management

- **Visit leaders and managers have a legal duty of care for the young people in their charge during an offsite visit**, and they must give careful consideration to the hazards involved, and ensure that suitable control measures are in place to reduce risks to a reasonable and acceptable level. **It is important to consider the aims and benefits as well as the risks involved. It is a legal requirement to carry out and record appropriate risk assessments - these should be “suitable and sufficient”, and not overly complicated.** The risk assessment should take account of the qualifications and experience of the staff members who are leading the visit. A pre-visit by the Group Leader(s) to inspect the proposed venue/activity provider is recommended, wherever possible, to help identify specific hazards and control measures.
- **The process of risk assessment/management should be a positive means of raising awareness of hazards and prompting constructive discussion regarding the best means of risk management.** The risk assessment can be thought of as the recorded minutes of a staff meeting.
- **Different people perceive hazards and the levels of risk differently, so it is good practice to discuss possible risks and management strategies with the other visit leaders** (and other more experienced staff) to establish a consensus of opinion. It is also an important educative process for young people to learn how to assess and manage risks. Relevant terms include:
 - **Benefits** - positive outcomes to be achieved by participating in the chosen activity.
 - **Hazards (or dangers)** - anything with the potential to cause harm.
 - **Risk** - the likelihood that someone may be harmed by the hazard.
 - **Control measures (or precautions)** – arrangements made to reduce the risk to an acceptable level.
- The different levels of risk assessment can be summarised below:



- **A wide range of written generic risk assessments for educational visits and offsite activities is available** on the East Riding of Yorkshire Council (ERYC) Visits web site <http://www.eriding.net/all-ages/educational-visits/risk-assessments/>. These identify common hazards and management strategies associated with most types of visits and offsite activities undertaken.
- **For further information, see the webpages from the Outdoor Education Adviser Panel national guidance:** Access via <https://oeapng.info/>

Chapter 10 - Insurance and Finance Arrangements (including charging for visits)

- **The Manager/Headteacher/EVC/Visit Organiser must ensure that adequate insurance arrangements are in place for all educational/offsite visits.** Insurance can be either provided by the Local Authority, or an external provider, such as one offered by a tour operator or travel company. **The Council can provide blanket travel insurance through its “Voyager” scheme.** This scheme provides cover for travel and offsite visits and activities within the UK, including loss of personal effects, cancellation and transportation home following illness. Additional cover can be requested for overseas visits. It operates to provide cover for visits organised in accordance with these guidelines. **Aspects of liability and insurance cover may be invalidated or withdrawn if Visit Organisers have not followed these guidelines, or have not received the correct official approval from the appropriate levels of authority.**
- **The Visit Organiser should check carefully that the insurance policy obtained for the visit is suitable and sufficient for the group’s needs.** In particular, the Visit Organiser should check the level and extent of cover provided, and note any significant conditions and exclusions.
- **The ERYC Insurance team is available to provide advice and guidance,** and to provide cost-effective insurance arrangements (tel. 01482 394196 or email insurance@eastriding.gov.uk). The Local Authority’s insurance policy does not apply to Academies. These establishments should seek advice from their own insurance consultant/insurer.
- **The responsibility for the insurance of private vehicles used on visits rests with the owner or driver concerned. Employees should have business cover on their vehicle insurance.**
- **Visit Organisers should ensure that visits are accurately costed and budgeted for, and that adequate allowances are made for additional unforeseen costs and changes in circumstances** (e.g. late cancellations). The income and expenditure for a visit must be recorded accurately, and the accounts should be made accessible for managers to inspect.
- **The education for pupils in maintained schools shall always be free of charge where it:-**
 - **takes place wholly, or mainly, in school hours;**
 - **takes place out of school hours, but as part of the syllabus for a prescribed public examination, the National Curriculum or part of statutory religious education.** The National Curriculum is not restricted to learning outside the classroom experiences that are specifically subject based (e.g. geography or science fieldwork) and can include, for example, activities designed to fulfil requirements under the National Curriculum ‘inclusion statement’ (e.g. developing teamwork skills).
- **Schools may ask parents for voluntary contributions towards the cost of these visits, but it must be clear that any contribution is genuinely voluntary.** Schools may ask parents for voluntary contributions towards the cost of any visit and the pupils of those parents who do not make such a contribution must not be discriminated against.
- **If a visit takes place largely outside school hours it can be considered to be an ‘optional extra’ and can be charged for. A charge may not be made for the cost of board and lodging during a residential visit if a parent is entitled to benefits (normally if the child is entitled to free school meals).**
- **Each school should have its own written policy (which has been approved by the Governors) relating to charges for educational activities.** A charge for “optional extras” or “board and lodgings” is not permitted unless such a policy is in place.
- **For further information, see the webpages from the Outdoor Education Adviser Panel national guidance:**
Access via <https://oeapng.info/>

Chapter 11. Overseas Visits (including exchange visits and expeditions)

- **All overseas visits (Category 4) should be recorded and submitted for approval to all relevant managers** (for schools, this includes the Educational Visits Coordinator, the Governors, and the Headteacher) using ROVER Online. These visits also need authorisation from the Local Authority.
- **Plenty of time (often more than 12 months) is needed for planning overseas visits** as they usually involve a lot of preparation and considerable expense.
- **A minimum staffing ratio of 1 competent adult to 10 group members** (with a minimum of 3 adults overall) is recommended. It is useful if one of the leaders can communicate in the local language, or at least carry a phrase book for use in an emergency. Group members should know how to respond and how to contact the leaders if they become separated from the group.
- **Visit Organisers must check that any tour operator or travel company used is reputable and reliable**, and that adequate financial protection is provided, (especially in the event of insolvency). The Learning Outside the Classroom (LOtC) Quality Badge provides a simple means for party leaders to ascertain that a provider has been inspected and accredited to a level that meets all the usual requirements, but additional information and assurances may be necessary.
- **Passports are needed for all overseas visits**, including day trips, usually in the form of an individual passport for each group member. Passports should be in good condition and valid for at least 6 months from the date of return. Photocopies of the key pages of passports, visas, and other important travel documents should be kept separate and secure by the visit leader.
- **Appropriate travel insurance, which includes cover for cancellation, and medical and other emergency expenses (including repatriation) is a requirement for all overseas visits.** In addition, organisers of visits to other European countries should check that all group members have current and valid EHIC cards which provide reciprocal medical care.
- **Separation from familiar language, culture, customs and laws heighten the need for careful planning, preparation and contingency arrangement, so it is essential that all members of a group know clearly what to expect and what is required of them.** Group members (and their parents/guardians) should also be made aware of the likely standards of accommodation, health services, vehicles, roads and other services, especially if visiting less developed countries where standards may differ from those expected in the UK.
- **Visit Leaders must identify likely health risks in the countries to be visited**, and ensure that group members have all necessary vaccinations and take recommended precautions. Visit organisers must assess and manage the associated risks accordingly. Travel advice should be sought, if appropriate, from the Foreign and Commonwealth Office (FCO).
- **For exchange visits, it is vital that there is close liaison throughout between the schools/establishments involved**, especially regarding the selection and vetting of host families and the organisation of suitable activity programmes. Group members should be able to contact their leaders at any time during an exchange visit if they have any concerns. The Vetting and Barring regulations do not apply to UK-based exchange visits of fewer than 28 days, but overseas parents should be given the opportunity to indicate that they consent to the suitability of the selection process that places their child with the volunteer host family. Group members should understand and accept the ground rules and procedures agreed between with the Group Leader and the host family for domestic living, and any activities and communication/contact arrangements with the Group Leaders. Visit leaders should keep regular contact with all group members and monitor their welfare throughout the visit. Young people should have ready (24hr) access to their Group Leader(s) throughout the stay, and they should be able to alert leaders immediately and confidentially to any serious concerns.
- **Overseas expeditions may present significant additional hazards and organisational challenges, and they require detailed planning.** The LA Educational Visits Officer should be notified of any proposed expeditions before any commitment is made or contract signed. The contract establishing the booking should be written and should be between the establishment and the provider. Staffing numbers and ratios should be based on risk-benefit assessments, taking into account all reasonably foreseeable variables. The gender balance amongst the staff should reflect the make-up of the group. Staff should have substantial and appropriate leadership experience (preferably in similar environments) and appropriate qualifications. A training and induction programme for all group members should be included as part of the preparation. It is recommended that the Visit Organiser attends an “Overseas Visits Planning and Leadership” course (organised by the LA) or the one-day “RGS Overseas Expeditions and Fieldwork Course”. The provider’s Expedition Leader(s) must be technically competent, with appropriate experience of working in similar environments. Responsibility for the pastoral care of the group rests with the leaders from the school/establishment. Appropriate emergency procedures and contingency plans should be agreed and in place before departure. Any swimming activities, including open water bathing, require special consideration.
- **For specific guidance regarding ski/snowsport visits, go to chapter VG 8.28**

Chapter 12 – Transport and travel arrangements

- **The Overall Group Leader must take reasonable steps to check that any transport used during the visit is suitable, satisfactory, and safe, and that any specific Local Authority or legal requirements are met.** For detailed guidance and recommendations on all specific forms of transport, refer to the Local Authority's generic risk assessments at <http://www.eriding.net/all-ages/educational-visits/risk-assessments/>
- **Visit leaders should ensure that group members comply with safety requirements and expected standards of behaviour, especially when getting on or off transport.** Visit leaders should carry out frequent head counts whilst travelling to check that everyone is present, especially before departing any venue. Buddy groups can help group members to keep a check on each other's whereabouts and welfare during travel.
- **Leaders should be briefed how to supervise groups whilst walking on pavements, or along roads with no pavements, and how road crossings will be managed.** Where available, pedestrian crossings, traffic lights, underpasses and footbridges should be used to cross roads.
- **The "Validation form (V4) for use of private vehicles" (see at this end of this chapter and in Appendix VGA 12.1) contains a suggested form with a checklist of assurances which should be completed by drivers who propose to transport young people in their private vehicles,** and drivers can then be assessed and approved as suitable by the headteacher/manager. For school visits that occur outside school hours (e.g. sports fixtures), it might be simpler for parents/guardians to make their own arrangements for the transport of children to and from an event, but it should be made clear (in writing) that the parents carry full responsibility for making these arrangements, and signed consent should be given to this effect.
- **Where seat belts are fitted in coaches/buses, leaders should take all reasonable steps to ensure that all group members use seat belts throughout the journey, and that the belts are fitted correctly to give maximum security.** The law requires that children up to 135cm tall (around 4'5"), or the age of 12 (whichever comes first) must travel in the correct child restraint (baby/child seat, booster seats/cushion) for their weight and with a seat belt properly fitted.
- **When hiring a bus/coach for an offsite visit, the Visit Organiser is responsible for ensuring that the coach/bus company is reliable and reputable.** If the company has been already checked and accredited by the Council's Transport Services, no further checks or assurances should normally be necessary. The "Coach/minibus hire company enquiry form EV3" (see Appendix VGA 12.2) can be sent to other coach/bus providers to obtain assurances regarding their operating procedures and safety management systems. It is recommended that Leaders check beforehand with the Coach company what back-up is available in the event of an accident or vehicle breakdown.
- **Travel by underground train must be carefully planned as it can be an intimidating and potentially hazardous method of travel for parties of young people,** especially if they have not used it before. It is particularly difficult to keep the group members together, and to supervise them effectively, especially during busy times. The Group Leader must ensure strict supervision and discipline, and provide clear instructions to all group members and staff, especially regarding procedures for getting on and off trains, and what to do if separated from the party.
- **Schools/establishments should establish a clear management system and operating procedures for maintaining, hiring, and driving minibuses and MPVs,** and managers/ headteachers should nominate a suitable officer to be responsible for overseeing this and ensuring that policies and procedures are complied with. Checks should be made at least annually to ensure that drivers have a full and correct driving licence, and that the driver has not been convicted of any driving offence, or is suffering from any significant medical condition. Schools and other voluntary organisations/establishments must possess and display a "Section 19 Small Bus Permit" in all self drive minibuses that are either owned or hired for use. Refer also to the Council's 'Driving at Work' policy.
- **Until the law is clarified further, schools/establishments are advised to only allow D1 or D license holders to drive minibuses. The Council's insurance requires all minibus/MPV drivers to have passed a Minibus Driver Awareness Scheme (MIDAS) training and assessment within the past 4 years.** Drivers should not drive if they are feeling tired or unwell. They should not drive for more than the recommended periods, and they must stop for adequate breaks during the journey (see details in 12.18 below).

Chapter 13 – Parent/Guardian information and consent

- **DfE Guidance issued in 2014 states:** “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. Parents must be told in advance of each activity and must be given the opportunity to withdraw their child from any particular school trip or activity covered by the form.”

The LA recommends that:

- **Blanket consent is obtained (normally annually, but can be longer) for regular routine activities that take place in the local area.** For schools, these visits are generally linked to the curriculum and are organised during school hours. These local visits form part of the normal everyday life of the school/establishment. They might include swimming lessons, sports matches, visits to the local library or sports grounds, local shops/church, or local schools. They do not include activities involving remote supervision or significant hazards.
- **Parent/guardian consent is obtained (as a statutory requirement) for all offsite visits involving nursery age children.**
- **Parent/guardian consent is obtained for all other visits on an individual visit basis.** This can include a code of conduct and behaviour, with an agreement that their child might not be allowed to participate, or might be asked to return early from a visit, if the child’s behaviour is not acceptable.
- **Parents/guardians should be informed, and their consent normally obtained, for transporting young people in private vehicles or for participating in any activity which may be deemed hazardous.**
- **A suggested “model” parental consent form is available in Appendices VGA 13.2 (for frequent/recurring local activities) and VGA 13.3 (for specific visits), which can be adapted to individual needs.**
- **It is not a legal requirement in the UK to provide parent/guardian consent for emergency medical treatment on visits, as a doctor’s duty of care will require them to act upon each situation in the best interests of the patient.** Nonetheless, parents/guardians should be made aware of this, and asked to give their written consent.
- **Visit organisers provide parents/guardians with all relevant information about proposed offsite visits and activities,** so that they are aware of the purpose and value of the visit, and fully informed regarding the arrangements and expectations.
- **Parents/guardians and group members should be aware how contact can be made during the visit and in the event of an emergency.**
- **Parents/guardians are asked to provide up to date information regarding essential information - such as emergency contact names and numbers, and medical issues and allergies - and visit leaders are made aware of all relevant information.** It should be made clear that this information will be kept confidential (and destroyed afterwards), but that relevant details may need to be shared with other leaders and external staff.

Chapter 14 - Emergency procedures

Schools/establishments and visit leaders should prepare for possible emergencies during offsite visits by having the following in place:

- a **critical incident policy** that includes dealing with emergencies during offsite visits;
- an **action checklist for Visit Leaders* to follow** if an incident occurs during an offsite visit;
- an **“Emergency Contact” list* that records all key telephone numbers** that leaders might require;
- a **list of parent and next of kin telephone contacts*** (it might be helpful to establish a “telephone tree” that will allow important information to be passed on quickly);
- **items marked * above should be carried or immediately accessible to leaders throughout the visit/activity;**
- an **adequate number of trained first aid personnel and first aid equipment;**
- **one or more responsible Emergency Home Contact(s)** who are available throughout the visit at base who can provide support and can act as a central liaison and communications link;
- a **“Request for Assistance” form** which can be used to summon help if an emergency occurs in a remote location;
- an **action checklist for Managers/Headteachers and/or Emergency Home Contacts** to follow in the event of a Group Leader reporting an emergency during a visit;
- an **incident log sheet for recording telephone calls and actions;**
- **details of the insurance company’s emergency helpline.**

Accidents, incidents, or dangerous occurrences must be recorded and reported in accordance with the Council's accident and incident reporting procedures. Significant incidents and issues of concern must also be brought immediately to the attention of the LA Educational Visits Officer and Safety Services.

In major emergencies, a range of Council agencies will be available to provide support. The Local Authority provides the following Emergency 24-hour Contact line: 01482 392999

After any major incident (including near misses), managers should undertake a thorough review of the incident and their emergency procedures, so that appropriate lessons can be learned and shared with others if necessary.

Chapter 15 - Briefing and Preparation of Group Members

- **The Overall Group Leader should ensure that all group members are fully briefed, and understand key information about the visit or activity (for example, the planned transport, accommodation, activity, and supervision arrangements) – see checklist at end of chapter.**
- **It is good practice, wherever possible, to involve young people (whatever their age) in the planning and organisation of a visit, and for them to understand the aims and objectives of the visit.**
- **The Visit Leaders should ensure that any activities during the visit are suitable and appropriate for the individuals involved, and that group members understand what will be involved so that they are fully prepared.**
- **Group members should be informed what clothing and equipment they should or should not bring with them.**
- **Visit Leaders should ensure that group members bring any personal medication that they might need, and that suitable arrangements are made to administer it.**
- **It is important for young people to learn how to recognise hazards and to manage risks sensibly and responsibly so that they become “risk aware” rather than “risk averse”. It is important therefore to involve group members in the risk assessment process, so that they become skilled in identifying hazards and managing risks themselves.**
- **During any time that remote supervision takes place the visit leader must ensure that group members are aware of the supervision and emergency contact arrangements, and that they have the necessary skills, maturity, responsibility, knowledge and equipment to operate safely as an independent individual/group.**
- **Group members must be clearly briefed what to do if an emergency occurs, especially if they have become separated from the group, or if an accident occurs during a period of remote supervision.**
- **Group members should know how to contact the Visit Leaders at all times, and there should be clear rules regarding the use of mobile phones during a visit.**
- **Group members should be aware of the planned travel arrangements and of basic safety rules for using transport – for example, the use of seat belts on coaches.**
- **Group members on visits must understand and accept the need for sensible and responsible behaviour. Leaders must therefore ensure that group members clearly understand what will be considered unacceptable behaviour or conduct, and the consequences of non-compliance. Leaders might ask group members to sign an agreed code of conduct and behaviour.**
- **Visit leaders should explain clearly any set boundaries, and ensure that group members fully understand the location of any significant hazards and any places where they are not allowed to go.**
- **“Buddy systems” are an effective means of promoting safety and welfare within the group.**

Chapter 16 - Documentation

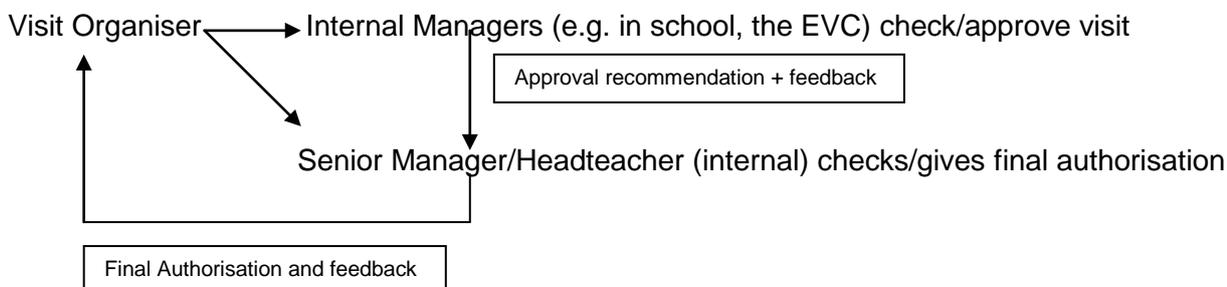
- It is recommended good practice for managers (for example, in schools, this might be the Head of Department, EVC, and/or Headteacher) to sometimes inspect the background information and supporting documents for a visit to ensure that there has been adequate planning and preparation for the visit.
- Managers should decide how much of the supporting documentation to inspect, depending upon the nature of the visit and activities involved, and the experience/competence of the visit leaders.
- The Local Authority might occasionally request to inspect supporting documentation for selected visits as part of the LA's quality assurance procedures. This information might be requested by post before a visit is approved, or during a visit as part of an on-site assessment.
- The ROVER online database will store securely and indefinitely all visit records that have been inputted.
- Any additional supporting documentation (risk assessments, parents letters etc.) should be stored and retained internally (for example, in the school/establishment office) until such time that Visit Organisers and managers are fully confident that any issues/incidents arising from the visit have been dealt with fully and are unlikely to be required for future reference or investigation. It should be noted that Ofsted or other Officers occasionally ask to inspect supporting documentation for previous visits.
- If it is clear that no incidents occurred during a visit, it should be reasonable and acceptable to dispose of any supporting documentation after 12 months. If some minor incidents occurred during a visit, it is recommended that supporting documentation for the visit is stored for a period of 6 years before disposal. However, a degree of common sense needs to be applied in such circumstances, and a realistic assessment needs to be made of the likelihood of a future claim, and the practicality of storing quantities of paperwork.
- If a significant incident occurred during a visit that could well be investigated at a later date, it is recommended that all relevant details are retained for a longer period of time (in more serious cases, it would be sensible to retain information until the young person becomes 21 years old). However, in order to save space, it is reasonable and acceptable to scan and store all relevant visit records electronically so that bulky paperwork can then be destroyed.

Chapter 17 - Seeking Visit Approval

SUMMARY OF KEY POINTS – see rest of chapter below for full details

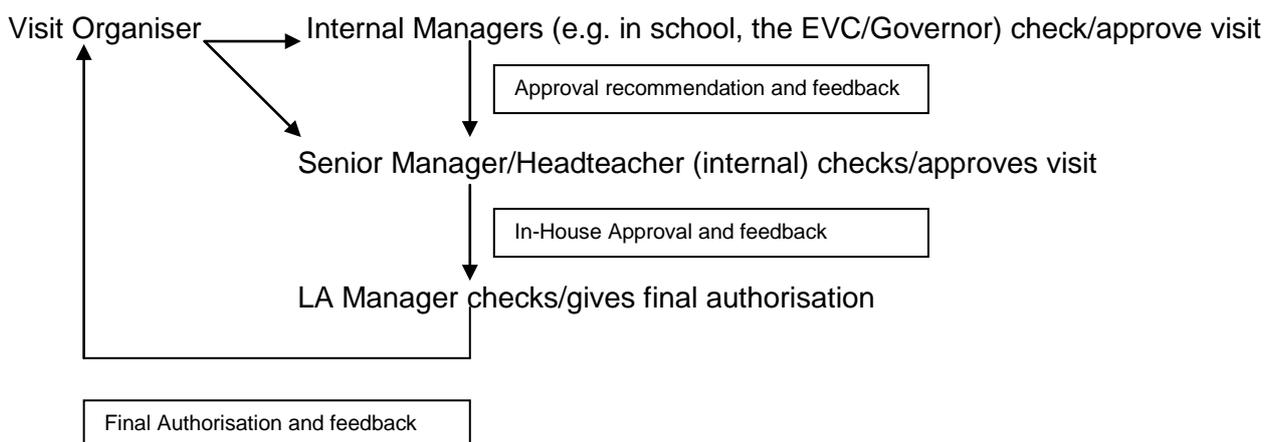
A. Day Visits (Category 1 and 2) not involving high risk activities or environments

- Use ROVER Online or Day Visits Form (depending upon own school/establishment policy)
- Submit at least 2 weeks in advance of visit



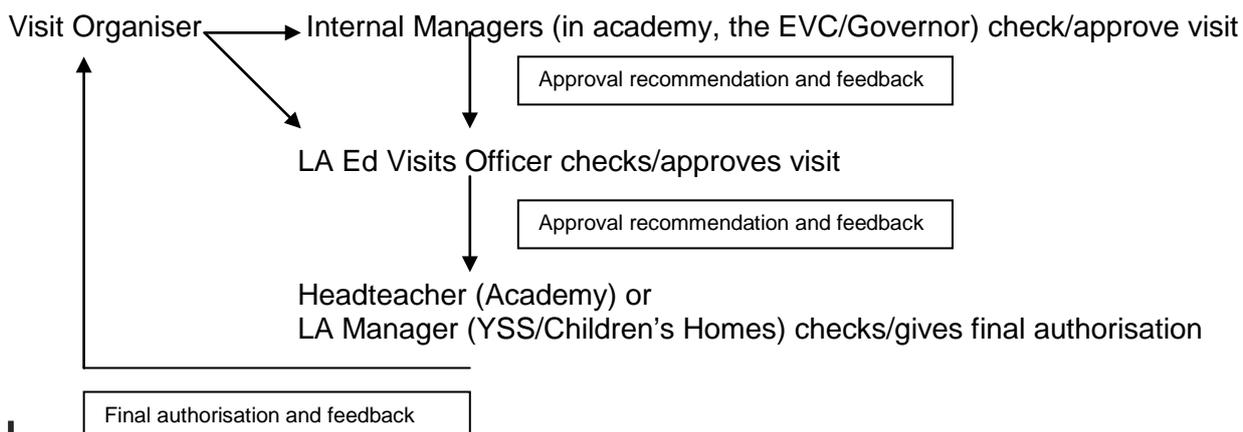
B. UK Residential (Category 3), Overseas(Category 4) and Visits involving High Risk Activities or Environments (Sub Category “A”) visits (In LA maintained schools/establishments only)

- Use ROVER Online only
- Submit at least 6 weeks in advance of visit



C. UK Residential (Category 3), Overseas(Category 4) and Visits involving High Risk Activities or Environments (Sub Category “A”) visits (Academies/Youth Support Services /Children’s Homes/other establishments)

- Use ROVER Online only
- Submit at least 6 weeks in advance of visit (submit Expeditions before financial commitment)



Chapter 18 - Visit approval status and feedback

- Details of visits should be suitably recorded, and then notified to and approved by all relevant managers.
- Visit organisers should not undertake a visit until they are sure that the visit has been approved by all relevant managers, and that all issues of concern that have been raised by managers have been addressed satisfactorily.
- Day visits (involving low risk activities and environments) require final authorisation (“In-House Approval”) by the senior Manager/Headteacher.
- Residential and overseas visits, and all visits involving high risk activities or environments must be recorded on ROVER Online and require final authorisation (“LA Approval”) by the Local Authority (N.B All Academy visits require final authorisation by the senior Manager/Headteacher).
- **Approval Responses**
 - “Not Approved” = significant changes needed
 - “Outline Approval” = basically OK but needs minor changes or more information
 - “In-House Approval” = approved by internal managers (final authorisation for academies)
 - “LA Approved” = approved by LA managers

Chapter 19 - Late amendments to visits

- Any changes to proposed visit plans must be clearly recorded.
- Minor amendments can be recorded on ROVER as a footnote at the end of a Visit Approval form, without normally requiring the form to be resubmitted and approved again by managers.
- Details of any significant changes to visit plans that have already been approved or submitted for approval, **MUST** be resubmitted to all relevant managers for additional approval.

Chapter 20 - Post-visit review and evaluation

- On return from a visit, **it is normally good practice for Visit Organisers to review the visit with the other visit leaders and with relevant managers**, and if appropriate to record any examples of good practice and lessons learned that might assist with the planning and leadership of future visits.
- **It is particularly important to record and review any accidents, incidents, or near-misses.** It is important that details are recorded as soon as possible after an incident whilst they are still fresh in the memory, preferably with signed witness accounts.
- **Serious incidents must be notified to RIDDOR (HSE's "Reporting of Injuries, Disease and Dangerous Occurrences Regulations 1995), and to the Local Authority using their standard forms and procedures.**
- **Post-visit reviews and evaluations may be recorded and stored on ROVER in section 20 or on the sample form at the end of this chapter.**