



# Guidelines For Off-site and Educational Visits 2012



Trafford Healthcare  
NHS Trust



Trafford  
Primary Care Trust



Trafford Children and Young People's Service brings together council and health services to improve outcomes for children, young people, their families and schools.

# Foreword

## High Quality Off-site and Educational Visits

Off – Site and Educational Visits play a significant part in the development of children and young people, adding to many aspects of the curriculum through the Learning Outside the Classroom agenda and broadening their experiences.

Trafford Council (the LA) fully supports and encourages all visits that are correctly planned, managed, and conducted.

We believe that all Local Authority establishments should strive for ‘High Quality Off–site and Educational Visits’, and in doing so maximise the benefits to those young people taking part.

This document aims to provide clear and unambiguous guidance for organising Off-site and Educational Visits.

It contains advice and procedures for Trafford Council establishments, and links with the DfE publication **Health & Safety Advice on legal duties and powers for Local Authorities, Head Teachers, Staff and Governing bodies** published in July 2011.

It also links with the HSE document **School trips and outdoor learning activities - Tackling the health and safety myths** published in June 2011.

It also makes use of the **‘Employers Guidance’** website of the **Outdoor Education Advisers’ Panel** as the main source of ‘industry standard’ advice and information.

Rather than repeating much of these documents cross-references and hyperlinks are used throughout this publication.

The LA places great emphasis on ‘competence’.

The competence of the Visit Leader is the single most important factor in ensuring the safety of participants involved in Off-site and Educational Visits.

As such, the competence of the Head of Establishment and Educational Visits Coordinator to accurately assess the competence of the Visit Leader is crucial.

The LA expects establishments to make accurate professional judgements regarding competence and encourages establishments to seek further advice from the Local Authority if necessary.

The guidance is aimed at all Local Authority establishments.

Trafford Council is keen to promote a broad and balanced curriculum, which includes residential and off-site visits.

It is hoped that this document will provide more opportunities for learning situations outside the classroom and outside formal education.

**This document is updated regularly to reflect changes in legislation or best practice.**

**The latest version of this document is always available on EVOLVE at [www.traffordvisits.org](http://www.traffordvisits.org)**

**Please ensure that you are using the latest version.**

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# 1 General

Trafford Council (the LA) acknowledges the immense value of Off-site and Educational Visits to young people, and fully supports and encourages all visits that are correctly planned, managed, and conducted. The LA believes that all establishments should strive for 'High Quality Off-site Educational Visits', in order to maximise the educational benefits to the young people taking part.

This document details the Requirements for Off-site and Educational Visits that establishments must meet, and includes general and specific guidance. It is intended to be supportive, and to help ensure that visits are organised with due care and reference to the safety of all participants. As such, this document is both an aide for all staff involved in visits, and a means to assist establishments in developing their own, robust, Off-site and Educational Visits Policy.

Trafford Council uses the 'EVOLVE' internet based system as a one-stop-shop for all matters relating to Off-site and Educational Visits. EVOLVE is found at [www.traffordvisits.org](http://www.traffordvisits.org) All Heads of Establishments and Educational Visits Coordinators (EVCs) have a login to the site. Other members of staff should contact their EVC for access to the site. All LA visit approval is processed through EVOLVE, which also contains a powerful database with search facilities, LA and DfE guidance, course information, an inter-EVC message service, document library, and downloadable resources and a reports section.

At the time of this document's production (2011), there is no single national guidance documentation in existence that is recognised across all Local Authorities.

Reference is therefore made to a number of separate sources, including but not limited to those of:

- Outdoor Education Advisers' Panel [www.oeapeg.info](http://www.oeapeg.info)
- National Library [www.national-library.info](http://www.national-library.info)
- Department for Education [www.dfe.gov.uk](http://www.dfe.gov.uk)
- Council for Learning Outside the Classroom [www.lotc.org.uk](http://www.lotc.org.uk)
- Health and Safety Executive [www.hse.gov.uk](http://www.hse.gov.uk)

In order to be concise hyperlinks are used throughout this document.

All documents are also available on EVOLVE

All establishments are required to develop their own Off-site and Educational Visits Policy. The EVC is expected to have a key role in this process. The Policy should be based on the DfE and LA Guidance and be adopted by the Governing Body (where applicable).

LA Maintained establishments are reminded that whilst certain tasks may be delegated to establishments, the LA as employer, retains the ultimate responsibility for visits no matter who carries out the tasks. The Local Authority is required to take action where the required standards are not reached, or where it believes that the health and safety of anybody engaged in off-site activities is at risk.

## 2 Role of the Educational Visits Coordinator

To help fulfil its health and safety obligations for visits, establishments must 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).

Although the role of EVC is not a formal requirement Trafford Council sees the role as vital in the smooth operation of Off –Site visits and is a ‘best practice’ requirement.

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.

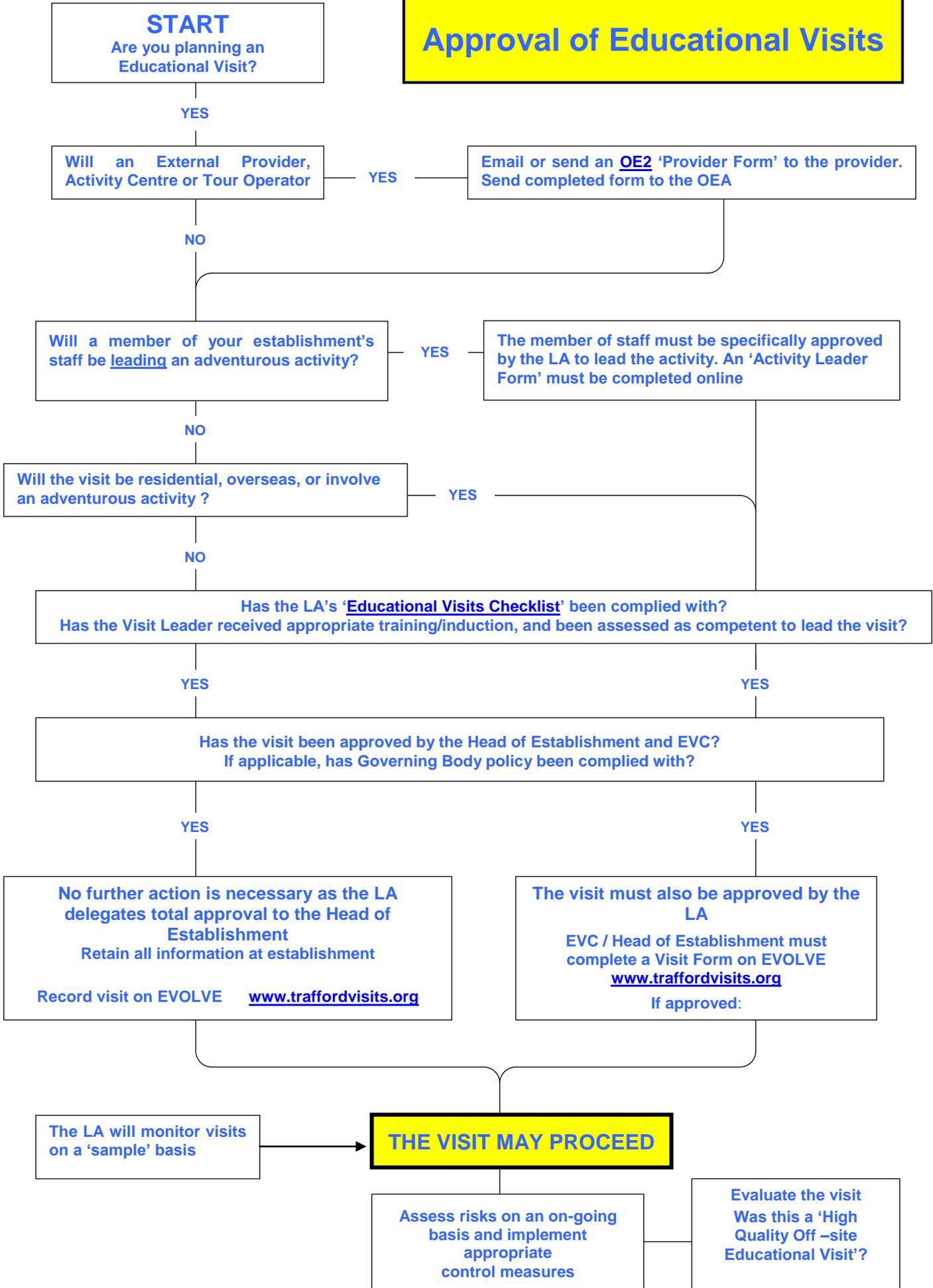
The EVC should receive training as required by the LA. Training records will be held on Evolve.

The EVC should support the head of establishment in ensuring that competent staff are assigned to lead and accompany visits and with approval and other decisions.

The EVC should ensure that a policy is in place for educational and off-site visits, and that this is updated as necessary, and readily available to staff, e.g. via EVOLVE.

Refer to OEAP Employer Guidance website: **[EVC Essential Reading](#)**

# Trafford Council Approval of Educational Visits



### 3 Approval of Visits

The 'Approval of Educational Visits' flowchart illustrates the LA approval system for Educational Visits, which is further described below:

All visits must be approved by the Head of Establishment and EVC. In approving visits the Head of Establishment and EVC should ensure that the Educational Visits Checklist has been complied with, and that the Visit Leader has been appropriately inducted and trained. The LA expects the EVC, Head of Establishment, and Governing Body (where applicable) to exercise appropriate professional judgement when approving visits, and expects the establishment to seek advice from the LA where necessary.

For visits that are NOT:

- a) overseas *or*
- b) residential *or*
- c) involving an adventurous activity

the LA delegates all aspects of the approval of these visits to the Head of Establishment.

This delegation is conditional upon compliance with the Educational Visits Checklist, and appropriate induction, training, and assessment of the Visit Leader's competence.

The establishment must keep a record of these visits, details of which may be requested by the LA as part of the LA's statutory supporting and monitoring role. The establishment is required to record these visits on EVOLVE.

For visits that ARE:

- a) overseas *or*
- b) residential *or*
- c) involving an adventurous activity

in addition to approval by the EVC and Head of Establishment, these visits must also be specifically approved by the LA, as follows:

The establishment's EVC must login to EVOLVE and complete a Visit Form online as early as possible in advance of the visit taking place. A minimum of 2 weeks is recommended. Note: for overseas expeditions as defined in Section Q, a different procedure applies and Outline Approval should be sought up to 24 months prior to the expedition taking place.

Following online submission of a Visit Form, the LA will review the information contained therein. The LA will either 'Approve' the visit, or 'Return' the Visit Form to the EVC (with reasons given). Where appropriate, the LA will attach a note to the Visit Form.

Prior to the visit taking place, the EVC must log back into EVOLVE in order to check the status of approval. The visit must not take place without LA Approval.

If the LA has attached a note that requires confirmation of being read, the EVC will not be permitted to access his/her account until this has been confirmed. EVOLVE will then record the date and time of this on the Visit Form.

A member of staff intending to lead (ie. instruct) an adventurous activity must be specifically approved by the LA to do so.

In LA maintained schools, the Governing Body should adopt a policy for the approval of Educational Visits.

Please contact the local authority if you require further advice regarding approval.

## 4 Outcomes and Evaluation

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, for subsequent evaluation.

Work 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, including:

- 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.

An Evaluation module is built into the EVOLVE system.

Refer to OEAP Website: [Evaluation of LOtC](#)

[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.

## 5 Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification.

You are 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 OEAP document: [Inclusion](#)

## 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 schools, community special schools, voluntary controlled schools, maintained nursery schools, Children's Centres, Children's Homes, pupil referral units, YOS, and statutory youth groups, the employer is the local authority.

These establishments must adhere to this guidance document.

For academies, foundation schools, Trust and voluntary aided schools, the employer is usually the governing body or proprietor. Although welcome to do so, these establishments are not obliged to use the guidance of the LA. If using LA guidance, this should be clearly stated.

If not using LA guidance, establishments are advised to ensure that the systems in place are as 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, see checklists below.

Where the LA is the employer, the Governors should not normally be expected to approve visits.

Where the Governing body is the employer, the governors' responsibilities will be the same as those of the LA.

In this case the establishment's educational visits policy must make it clear if the establishment is following LA guidance.

Refer to checklists: [Visit Leader](#), [EVC](#), [Head/Manager](#), [Parent/Guardian](#), [Management/Governor](#)

Refer to OEAP document: [Planning Basics](#)

Refer to OEAP powerpoint: [Planning Visits, Off-site Activity and LOtC](#)

## 7 Competence to Lead

The single most important factor in ensuring the safety of participants involved in an Off-site Visit or activity is the competence of the Visit Leader.

The EVC and/or Head of Establishment should therefore consider the following when assessing the competence of a member of staff to lead a visit:

- a) What are the leader's reasons for undertaking the visit?
- b) Is the leader an employee of the local authority?
- c) Has the leader a real sense of responsibility, extending beyond the teaching of the subject to concern for the participants' well-being?
- d) Does the leader possess the necessary organising ability?
- e) Is the leader competent in risk assessment and risk management?
- f) What experience has the leader of the participants he/she intends to lead?
- g) What experience has the leader in leading, or assisting in the leading of similar visits or activities?
- 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, and able to comply with all relevant guidelines?

The establishment should contact the local authority if there is doubt regarding the competence of a member of staff to lead an Educational Visit.

## 8 Planning and Risk Management

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

The extent of planning required is related to the complexity of the visit, see:

- [Planning with EVOLVE](#) diagram.
- [Visit Leader Checklist](#)
- [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, LA policy, etc. 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.

Due 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 where appropriate, any event specific notes or attachments.

Visit planning includes consideration of the question: *'What are the really important things that we need to do to keep us safe?'* It 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 staff team, and the leader in the context of the event. Significant issues must be recorded on EVOLVE, either 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 which is relevant to the needs of the group.

Planning that includes adventurous activity commonly involves delivery by an external provider and the provider will have responsibility for risk assessing and managing the activity. As such, the provider's risk assessment is not the concern of the establishment leader, does not need to be requested from the provider, and does not need to be attached to EVOLVE.

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 is endorsed by HSE in **Principles of Sensible Risk Management**

Refer to OEAP document: **Planning Basics**

Refer to OEAP powerpoint: **Planning Visits, Off-site Activities & LOtC**

## **9 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 reemphasised as appropriate during the visit.

Monitoring of the visit must be ongoing, and 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 (eg Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

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 DfE document: **A Handbook for Group Leaders**

Refer to OEAP document: **Responsibilities of Visit Leader**

## 10 Parent / Carer Consent

Section 35 of the Education Act 2004 states: '*Where a visit is part of a planned curriculum in normal curriculum time, then parental consent is not necessary although it is recommended good practice to ensure that parents are informed*'.

Annual consent is appropriate for regular routine activities.

For all other visits Parents and those with parental responsibility should be made fully aware of the likely risks and their management, so that consent or refusal can be given on a fully informed basis.

Information to parents must therefore include full details of the activities to be undertaken and venues, together with the supervision arrangements and any other relevant information.

All possible alternative activities (including 'Plan B' arrangements) must also be included within the information given to parents.

The Parental Consent form should therefore either list the activities to be undertaken, or should refer to the 'Information Letter' which contains this information.

Refer to DfE document: [DfE Advice on Legal Duties and Powers](#)

## 11 Staffing, Ratios, and Supervision

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

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

For all other visits the visit leader, EVC and Head of establishment will make a professional judgement 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, EVC's and Heads/Managers 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 see [OEAP Underpinning Framework](#)

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 OEAP document: [Group Management and Supervision](#)

Refer to OEAP document: [Vetting and CRB Checks](#)

## 12 Remote Supervision

Young people must be supervised throughout all visits, even though at times they may be unaccompanied by a member of staff or other responsible adult, eg. D of E expeditions, 'down' time in a town, etc. This is known as 'remote' or 'indirect' supervision.

Trafford Council acknowledges the immense educational benefits that 'remotely supervised' activities can potentially bring to young people, and fully supports and encourages remotely supervised activities that are correctly planned, managed, and conducted.

The decision to allow remote supervision should be based on risk assessment and must take into account such factors as: prior knowledge of the individuals (including their maturity and levels of responsibility); the venue; the conditions; the activity taking place; preparatory training; the competence of the supervising staff; the emergency systems in place, etc.

Parental consent must be obtained prior to the 'remote' supervision of young people.

## 13 First Aid

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

'Basic Skills' is a level which may be 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 judgement regarding the level of first aid required. However any residential visit or adventurous activity should be accompanied by, or have access to, qualified first aid provision (minimum 2 day award). For residential visits the visit leader should ensure that first aid is available at all times.

A first aid kit appropriate to the visit should be carried, and there should always be someone who is nominated to deal with first aid issues.

The first aid requirements relating to EYFS settings are specified and must be adhered to, see **Statutory Framework for the Early Years Foundation Stage**

Refer to OEAP document: **First Aid**

## 14 Insurance

Advice regarding insurance may be sought from the Local Authority's Insurance section. Contact: Insurance Section 912 4388.

### DEFINITION OF AN INSURABLE VISIT

This occurs when young people:

- visit countries abroad, including exchange visits;
- visit UK destinations for 24 hours or more;
- take part in visits involving a special risk regardless of duration or destination

In addition to the standard public liability cover which all maintained establishments will have in place, the Council has made arrangements for a personal accident cover / travel insurance for all trips/visits at home or abroad which fall into this category. This cover is available to all establishments who wish to take advantage of this arrangement **only** through the EVOLVE website.

A summary of this scheme is provided in the documents folder of **EVOLVE**.

Full details of the cover and scheme are available from the insurance section.

For those establishments who make their own insurance arrangements for personal accident / travel insurance they must ensure that the cover provided and policy limits are equivalent to, or better than, the LA Insurance scheme. Where travel insurance is required, suitable insurance must be in effect before the trip departs.

For all other visits it is the responsibility of the Governing Body (where applicable), Head of Establishment, and Educational Visits Coordinator to determine whether additional insurance should be taken out.

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](http://www.dh.gov.uk)

Refer to OEAP document: **Insurance**

## 15 Transport

Trafford maintained establishments should refer, in the first instance, to '[Safe Transport Policy, CYPS, April 2007](#)' and the subsequent update detailed in the letter to all establishments dated 30 November 2007.

The following general information is taken from this document.

Parents must be made aware of the intended form of transport, and their consent obtained.

### PRIVATE CARS

Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Head of Establishment, and it is advised that a '[PRIVATE CAR](#)' Form be completed and retained by the establishment (on an annual basis).

Refer to OEAP document: **Transport in Private Cars**

### MINIBUSES

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

For further information, see also:

- Refer to OEAP document: **Transport in Minibuses**
- DVLA [www.dvla.gov.uk](http://www.dvla.gov.uk) Select 'Online leaflets', INF28 'Driving a minibus'
- ROSPA '[Minibus Safety: A Code of Practice](#)' 2008
- MiDAS (Minibus Driver Awareness Scheme) via **Community Transport Association UK**. This also contains information on PCV licences, weight limits and towing.

In summary, all drivers of minibuses should undertake the Trafford Minibus training and keep that training current. This applies to pre & post 1997 licence holders operating under the section 19 permit scheme as 'volunteer drivers'. **Post 1997** licence holders may drive a minibus provided:

- Drivers are aged 25 years or over.
- They have held their category B driving licence for at least two years.
- The minibus is being used by a non-commercial body for social purposes, but not for hire or reward.
- Drivers are not being paid to drive the minibus, other than out-of-pocket expenses.
- The minibus does not exceed 3.5 tonnes (or 4.25 tonnes if specialised equipment for the carriage of disabled passengers is included) gross vehicle weight.
- No trailer is towed.

If any of the above provisions are not met, then a full D1 PCV is required.

## 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.

Refer to OEAP document: [Transport: General Considerations](#)

## 16 Weather, Clothing & Survival

Where appropriate, the leader must obtain and be able to act upon appropriate, recent, weather forecasts. Local advice must also be obtained where appropriate.

All participants should be adequately clothed. Needs will be determined by:

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

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

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

The following criteria are suggested as a guide to distinguishing the condition under which Summer and Winter conditions may be gauged for undertaking Open Country Activities.

Summer conditions exist when there is no likelihood of extensive snow / ice under foot, present or forecast.

Cold winds, rain and low temperatures are an accepted feature of summer conditions on the mountains and moors for which the leader and the party should be prepared.

Winter conditions are when extensive snow / ice under foot is present or forecast irrespective of the time of year.

## 17 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.

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

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.

Particular consideration should be given to the following factors:

- Unknown locations and hazards, especially overseas.
- Changing environmental conditions.
- Supervisor complacency & lack of transferable knowledge.
- Adherence to local advice.

- Preparation and knowledge of young people, ie. is it a planned activity?

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

### **Open water swimming**

LA Approval is required via EVOLVE.

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](http://www.lifesavers.org.uk) Note: this is for beach/sea only, not inland water. **or**

#### 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](http://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](http://www.lifesavers.org.uk)

### **Swimming pools (lifeguarded)**

LA Approval is not required

- 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.
- Unless suitably qualified, the establishment's staff should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.
- 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**

Establishments should check the lifeguarding position in advance.

LA Approval is not required for this activity if qualified lifeguarding is provided at the pool.

If lifeguarding arrangements are not provided at the pool then the visit leader will bear the full responsibility for ensuring swimming safety, and approval to lead the activity will be required via EVOLVE.

The following awards/qualifications apply:

#### For free swimming activity

- A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see [www.lifesavers.org.uk](http://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](http://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](http://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 (eg. 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 at the venue will provide back up. 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.

## 18 Farm Visits

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

Refer to Farming & Countryside Education: [www.face-online.org.uk](http://www.face-online.org.uk)

Refer to OEAP document: [Farm Visits](#)

## 19 Residential Visits

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

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

Refer to OEAP document: [Residential Visits Mindmap](#)

## 20 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.

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

**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](http://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](http://www.dh.gov.uk)

#### For exchange visits:

- The LA has adopted the Outdoor Education Advisers' Panel guidance document: **Young People's Exchange Visits** LA establishments are required to adhere to all relevant aspects of this guidance.
- Refer to the British Council (Learning) [www.britishcouncil.org](http://www.britishcouncil.org)
- Refer to OEAP document: **Exchanges & home-stays**

For Overseas Expeditions see **Section 27**

Refer to OEAP document: **Overseas visits**

## 21 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.**

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

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

At the outset the establishment must decide whether the activity:

- a) Falls **within** the definition in bold above - in which case the below guidance applies,  
*or*
- b) **Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and **Section 24** 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 has been obtained if necessary.

LA approval is not required for water-margin activities, but 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.

## 22 Definition of an ‘adventurous activity’

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

- All activities in ‘open country’
- Swimming (all forms, excluding publicly lifeguarded pools)
- Camping
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- Narrowboat Day Trips / Residentials
- All other forms of boating (excluding commercial transport)
- Water skiing
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration
- Shooting and archery
- Skiing, snowboarding, and related activities (including dry slope and Indoor snow domes)
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- ‘Extreme’ sports
- Ice Skating
- Orienteering
- Mountain Biking / BMX Cycling / Road Cycling
- Skateboarding / Roller Blading
- Laser Quest / Paint Ball
- Bushcraft
- Forest Schools
- Other activities (eg. 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 a somewhat arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the local authority if you think this might apply.

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 has been assessed by the EVC or Head of Establishment as competent to supervise the activity:

- Walking in parks or on non-remote country paths
- Field studies (unless in remote environments)
- Swimming in publicly lifeguarded pools
- Theme parks
- Tourist attractions
- Pedal go-karts
- Farm visits
- Local traffic survey
- Museum, library, etc.
- Physical Education and sports fixtures
- Water-margin activities.

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

## 23 Adventurous Activities

This section is applicable to all adventurous activities except the following, for which separate guidance applies:

**Water-based activities**

**Open country activities**

**Snowsports**

**Overseas expeditions**

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

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

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

a) **An external provider -**

The provider must hold an **LOtC Quality Badge** or complete a **Provider Form**

Note: If a Provider holds an **AALA licence** (and/or any other accreditation) but not an 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**

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

## 24 Water-Based Activities

For clarification between water-margin and water-based activities please see **Section 21**.

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.

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

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

- Swimming in publicly lifeguarded pools
- Water-margin activities as defined in **Section 21**
- 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**

The provider must hold an **LOtC Quality Badge** or complete a **Provider Form**

Note: If a Provider holds an **AALA licence** (and/or any other accreditation) but not an 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**

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, eg coastguard, harbour master, other site users, etc.

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.

## 25 'Open country' activities

Trafford Council 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.

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 a somewhat arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the local authority if you think this might apply.

Open country activities are regarded as 'adventurous' and therefore the overall visit requires LA approval.

In addition, the technical competence of the instructor or staff member leading the activity must be ratified. This person will be either:

- a) an external provider or
- b) a member of your establishment's staff

Where open country activities are to be led by an external provider (eg an activity centre), the Provider Form ensures that the activity leader/instructor possesses an appropriate level of technical competence. No further action will normally be necessary as regards the technical competence of the activity leader if a Provider Form has been satisfactorily completed.

Where open country activities are to be led by a member of the LA establishment's staff, then the leader must be approved by the LA and an 'Activity Leader Form' (ALF) completed via EVOLVE (see Section 29). The leader must demonstrate a minimum level of technical competence as follows:

- a) **For leaders of walking groups outside the UK or Ireland**, please contact the local authority for further guidance.

b) **For leaders of walking groups in mountainous terrain within the UK and Ireland**, the appropriate minimum qualification is the Mountain Leader Award (Summer or Winter as appropriate) administered by Mountain Leader Training UK [www.mltuk.org](http://www.mltuk.org) or a written statement of competence by an appropriate technical adviser.

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, and where any hazards within it are identifiable and avoidable, and where wild camping or movement on steep ground is not involved, the appropriate minimum qualification is the Walking Group Leader Award (WGL), administered by Mountain Leader Training UK [www.mltuk.org](http://www.mltuk.org) or a written statement of competence by an appropriate technical adviser.

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:

- i) The Sports Leaders UK Level 2 Award in Basic Expedition Leadership (formerly BELA). This is appropriate for leading groups in lowland areas, and for organising base and mobile camps. See [www.bst.org.uk](http://www.bst.org.uk)
- ii) Completion of a OEAP 'Leader Training' Course.
- iii) A written statement of competence by an appropriate technical adviser
- iv) Evidence of recent, relevant experience, appropriately corroborated.
- v) A statement of competence (written or implied) by the Head of Establishment.

Please contact the local authority if you require further advice.

## 26 Snowsports

Trafford Council 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.

Snowsports (skiing and snowboarding) **AND** Snow based recreation activities such as Luge, tubes and air boards are regarded as adventurous activities, and the visit must therefore be approved by Trafford Council.

LA establishments are particularly encouraged to consider the benefits of snowsports visits taking place during term time as opposed to during the holiday period. These benefits include: greater choice generally, less queuing for lifts, less crowded slopes therefore safer as less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent ski school instructors (as opposed to 'casual' instructors), greater likelihood of English speaking instructors, considerable cost savings through avoiding high season (possibly allowing more young people to participate), etc.

A member of staff intending to organise a snowsport visit (but not instruct, lead or supervise on snow) must hold the Ski Course Organiser Award (SCO), administered by Snowsport England. Tel. 0121 501 2314 [www.snowsportengland.org](http://www.snowsportengland.org) and must have previously accompanied at least one educational snowsports visit.

Young people may only ski or snowboard when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports establishment. LA 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 (ie. not using a ski school instructor) must:

- a) be qualified as below, *and*
- b) have been approved by the LA *and*
- c) operate at all times within the remit of their qualifications.

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

- The Alpine Ski Course Leader Award (ASCL) of Snowsport England  
Tel. 0121 501 2314 [www.snowsportengland.org](http://www.snowsportengland.org) or
- The Alpine Ski Leader Award (ASL) of Snowsport Scotland  
Tel. 0131 445 4151 [www.snowsportscotland.org.uk](http://www.snowsportscotland.org.uk) or
- A statement of competence by an appropriate 'technical adviser'

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

- The Snowboard Leader Award (SBL) administered by Snowsport Scotland  
Tel. 0131 445 4151 [www.snowsportscotland.org.uk](http://www.snowsportscotland.org.uk) or
- A statement of competence by an appropriate 'technical adviser' (see 2.7).

Suitable helmets must be worn by participants at all times when: aged under 8, or racing, or aged under 14 in Italy, or where risk assessment deems this to be a necessity.

Young people may only participate in off-piste activities or in a 'snow park' if this is within the patrolled ski area, and they are accompanied by a qualified instructor, and this is covered within the insurance policy.

**Important:** 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, and should seek advice from the local authority.

Please contact the local authority if you require further advice.

## 27 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.

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

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](http://www.lotcqualitybadge.org.uk) or
- b) Provides a statement of compliance with **Guidance for Overseas Expeditions, Edition 3**

For providers that do not hold an 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](http://www.rgs.org/eac)

## 28 Emergency Procedures

Trafford Council establishments should draw up an emergency action plan within their Health and Safety policy for Educational 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) A completed: '**Emergency Card – Visit Leader**' form must be with the Visit Leader at all times, *and*
- b) A completed '**Emergency Card – Home Contacts**' form must be with the Establishment Emergency Home Contact(s) at all times.

The Youth Service 'Home Contacts Procedure Policy' provides a similar robust system.

In an emergency, if it is not possible to reach any of the 'designated establishment contacts', the leader should telephone Trafford Council on 0161 912 2020. This is the LA's emergency number and operates on a 24 hour basis.

Refer to OEAP document: **Critical Incident Management for Visits**

Refer to **A Handbook for Group Leaders**

## 29 Approval of staff to lead an adventurous activity

### Completion of an ALF - Activity Leader Form on EVOLVE)

#### **PROCEDURE FOR OBTAINING APPROVAL**

Staff who wish to lead (ie. supervise or instruct) an adventurous activity must obtain the prior approval of the LA before the activity may take place.

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

The EVC (or Visit Leader) should complete the Visit Form via EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (eg 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 consider the proposed activity relative to the leader's stated competencies and qualifications.

Where approval is granted for the member of staff to lead the activity, the visit will be approved by the LA via EVOLVE.

Where approval is not granted, the Visit Form will be returned to the EVC with an attached note.

Where this is the case the member of staff concerned must not lead the activity.

## **CRITERIA FOR APPROVAL**

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

- is appropriately qualified through the relevant National Governing Body, *or*
- has a 'Statement of Competence' from an appropriate 'technical adviser' (see z.8).

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 local authority.

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

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

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

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

The approval granted is solely in respect of a member of staff's authorisation to lead the technical aspects of the specific adventurous activity detailed. It is not an indication in respect of other aspects of the visit such as general management and supervision skills, the assessment of which may be the responsibility of Head of Establishment and/or EVC.

## **30 Using an External Provider**

### **(Provider Forms OE2 / OE3 / OE4)**

This section is applicable when an LA establishment intends to employ the services of an External Provider, and where there is an element of instruction, staffing, or guiding included, for example:

- Activity Centre
- Ski Company
- Educational Tour Operator
- Overseas Expedition Provider
- Provider of Developmental programmes for individual Placements
- Provider of non – medical counselling services
- 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:

- Museums, galleries, etc
- Tourist attractions
- Theme Parks
- Farms
- Coach, Train, or Airline companies (but see Safe Transport Policy)
- Swimming Pool
- Climbing Wall where instruction is provided by a member of your establishment's staff

- 'Volunteer' instructor of adventurous activities

Unless there is a residential element

The LA also requires that providers of accommodation only complete the relevant form **OE3**.

This includes:

- Youth Hostels (where accommodation only is used)
- Bunkhouses
- Hotel, B&B, etc
- Campsite

## GENERAL

The decision about the use of an external provider is the responsibility of the EVC, Head of Establishment, and Governing Body (where applicable). The LA does not 'approve' external providers or tour operators.

LA establishments should consider the requirements under 'best value' when selecting an external provider.

LA establishments that intend to use an external provider should check that all aspects of the operation of the provider are satisfactory. In order to help ascertain this, establishments must ensure that a 'Provider Form' has been satisfactorily completed by the provider.

The procedure is appropriate in all cases irrespective of whether the provider has commercial, charitable, voluntary, or other status.

## PROCEDURE

- a) Download and open the relevant 'Provider Form (**OE2 / OE3 / OE4**)' (or photocopy).
- b) Complete the top section.
- c) Send Provider Form to the provider (email, fax, or post)
- d) On its return check that it has been satisfactorily completed.
- e) Keep Provider Form on file together with all other relevant documentation.
- f) Forward a copy of the provider form to the LA.
- g) Obtain confirmation from LA that Provider complies with LA requirements.

## 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 local authority prior to making a commitment with the Provider.**

## NOTES

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 references from previous users will help you decide on its suitability.

In some instances, for example where an establishment intends to use an 'external', voluntary individual for services, then this person may be regarded as a temporary member of staff and the procedure outlined in Section 29 may be appropriate.

Please contact the local authority where this applies.

The above procedure is not sufficient for Overseas Expeditions (ie. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and must be complied with.

## 31 Procedures for Individual Placements

Recently multi – agency teams have started to use External Providers for Individual placements of young people, as part of a development programme, where the young person is not accompanied by a member of staff.

To enable a suitable and sufficient system to be put in place the LA has provided the following supplementary guidance:-

**'Notification and approval system for Unaccompanied Individual Placements using Outdoor and Adventurous Activities, May 2007'**

**'Notification and Approval for Unaccompanied Individual Placements'** or

**'Referrals to External Agencies on Non–Adventurous or Outdoor Activities, Sept 07'**

These documents are available from the establishment's EVC or download via EVOLVE.

All such activities have to be recorded on the EVOLVE on line system.

# Educational Visits Checklist

This checklist is a useful tool to aid planning and is applicable for **all** visits.

**The visit should only go ahead if the answer to all applicable questions is 'YES'**

## In advance of the visit:

1. Have the educational aims of the visit been clearly identified?  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)  yes
6. If a member of staff is going to lead an adventurous activity, have they been 'approved' by the LA?  yes  n/a
7. If using an external provider or tour operator, has the provider satisfactorily completed and returned a 'Provider Form'?  yes  n/a
8. Are transport arrangements suitable and satisfactory?  yes  n/a
9. If the visit is residential, have appropriate measure been taken to ensure the suitability of accommodation?  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?  yes  n/a
11. Have you conducted a pre-visit? (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. Has Event Specific Risk Assessment (OE6) been carried out and will this be shared with all relevant parties?  yes
19. Is insurance cover adequate?  yes
20. Does at least one member of staff know the participants that are being taken away, including any behavioural traits?  yes

21. Have participants been advised in advance about expectations for their behaviour? 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?  yes
24. Have all relevant details been issued? (eg. 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?  yes
29. Is a first aid kit (appropriate to the visit) available?  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. eg. 'Plan B', and have these plans been risk assessed and parental consent been obtained?  yes
31. For journeys taking place outside the establishment's 'normal' hours, will the Emergency Contacts Form be carried by the Visit Leader, and Home Contacts Form with the designated emergency contact/s?  yes  n/a
32. Are full details of the visit at the LA establishment, 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?  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?  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?  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)?  yes
41. If residential, overseas or involving adventurous activities, has the visit been approved by the LA ?  yes  n/a

### During the visit

42. Do all staff have a list of participants/groups? + 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 and contact details? If out of normal hours, does the designated home contact have an 'Emergency Card – Home Contacts'?  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, eg. 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? (eg. 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, eg. paperwork, finance, thank you letters, etc?  yes
58. Has the visit been evaluated, and if appropriate have notes been made of points to be considered for future visits? Evaluation can be completed via EVOLVE  yes
59. Have all staff and helpers involved in the visit been thanked for their input?  yes

**FOR COMPLETION BY PROVIDERS AND TOUR OPERATORS**

**OF OUTDOOR EDUCATION, OVERSEAS AND RESIDENTIAL VISITS TO CYPSS ESTABLISHMENTS AND PROJECTS**

When considering using a provider or tour operator to deliver Outdoor Education, Overseas or for a Residential visit CYPSS Establishments and Projects must seek written assurances that the provision complies with the Trafford 'Guidelines for Off-Site and Educational Visits'

**Satisfactory completion of this form and confirmation of the suitability of the provider from the LA must be obtained prior to contracts being signed or deposits paid**

CYPSS Establishment / Project		Leader in charge:	
Date(s) of visit:		Name of provider:	

The provider or tour operator providing services as outlined above is asked to give careful consideration to the statements below and INITIAL in the space at the end of the STATEMENT that the standard of service provided will meet the conditions listed. Indicate by a cross any you cannot meet. Write N/A against any specifications which do not apply to your provision.

**SECTION 1 – PUBLIC LIABILITY INSURANCE**

The provider has Public Liability Insurance for at least £5 million with a clause giving "indemnity to principal" for the duration of the visit .

A copy of the Certificate of Insurance MUST be provided with this form.

**SECTION 2 – LoTC QUALITY BADGE AND ADVENTURE MARK**

Has your organisation applied for and been granted a 'Learning Outside the Classroom' Quality Badge or 'Adventure Mark' Badge?

If YES please indicate the date granted and any other relevant information in the space below

Holders of these Quality badges only need to complete the contact information section at the end of this form.

If NO please complete the next sections

**SECTION A – ALL VISITS**

Section A should be completed for all visits. Sections B (Outdoor Education), C (Tour Operators) and D (Overseas Expeditions) should be completed if applicable.

Health, Safety and Emergency procedures

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 that are available for inspection

2. Accident and emergency procedures are maintained and records are available for inspection.

Vehicles / Drivers

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

4. All drivers hold appropriate licences and have undertaken relevant driver training for the vehicles used.

Staffing

5. All reasonable steps are taken to check staff who have access to young people for relevant criminal history and suitability for work with young people.

6. There are adequate and regular opportunities for liaison between Trafford staff and the provider's staff and there is sufficient flexibility to make radical changes to the programme if necessary and the reasons for such changes will be made known to Trafford staff.

Accommodation (if residential accommodation is provided)

7. A current fire certificate covers UK accommodation or advice has been sought from a fire officer and implemented and a fire risk assessment has been completed.

8. If abroad, the accommodation complies with the fire, health and safety regulations for the country concerned.

9. There are appropriate security arrangements to prevent unauthorised persons entering the accommodation.

10. Separate male and female sleeping accommodation and washing facilities are provided and staff accommodation is close to the young people.

#### Section B – Outdoor Activities and Field Studies

11. Adventure Activities Licensing Authority (AALA) Licence Yes:  No:  Not applicable:

12. AALA reference No R \_\_\_\_\_

*For AALA licensable activities in the UK, the specifications in this section are checked as part of an AALA inspection. However, providers registered with AALA are asked to consider these specifications with respect to any activity or aspect of their provision which is not covered by the licence.*

#### Activity Management

13. 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.

14. 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 for the country concerned.

15. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be undertaken or staff have had their competences confirmed by an appropriately experienced Technical Adviser.

16. Where there is no National Governing Body for the activity, operating procedures, staff training and assessments requirements are explained in the provider's code of practice.

17. Participants will at times have access to a person with a current first aid qualification. Staff are practiced and competent in accident and emergency procedures.

18. There is a clear definition of responsibilities between providers and visiting leaders regarding supervision and welfare of participants.

19. All equipment used in activities is suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary.

20. The provider will take all reasonable steps to allow inclusion and participation of any young people who have special needs or have a disability, following a risk assessment process, in line with the Equality Act 2010.

21. The provider encourages responsible attitudes to the environment as an integral part of the programme.

#### SECTION C – TOUR OPERATORS

Where a tour operator delivers services to Trafford Schools and Youth Service projects using other providers e.g. ski schools, 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 regulation which apply to the country of operation.

22. Sections A and B of the form, as appropriate, have been completed to show that the checks have been made, records of which are available for inspection.

23. The Tour Operator complies with 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 has completed sections A and B of this form and agrees to provide additional written assurances which are specific to the expedition being proposed and which will be made clear to the provider by the Trafford Adviser for Outdoor Education and Educational Visits.



**CONTACT AND OTHER RELEVANT INFORMATION**

If any of the above specifications cannot be met or are not applicable, please give details:

Details of any other accreditation with National Governing Bodies, tourist boards etc

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

Name in capitals: \_\_\_\_\_ Position in organisation: \_\_\_\_\_

Name and address of provider or tour operator: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Thank you for completing the form. Please return to the leader at the CYPS Establishment or project named overleaf**

CYPS Establishments and Projects should contact the Trafford Adviser for Outdoor Education and Educational Visits for advice on the information provided on the form.

Telephone: 0161 911 8651

E-mail [steve.berry@trafford.gov.uk](mailto:steve.berry@trafford.gov.uk)

**CHILDREN AND YOUNG PEOPLE'S SERVICE  
FOR COMPLETION BY EXTERNAL PROVIDERS OF OFF - SITE AND EDUCATIONAL VISITS  
TO TRAFFORD CYPS ESTABLISHMENTS AND PROJECTS – INDIVIDUAL AND GROUP**

When considering using a provider to deliver a **standard** Off Site or Educational Visit, Trafford CYPS establishments and projects must seek written assurances that the provision complies with the Trafford Guidelines.

Providers of Adventurous, Overseas or Residential Activities should complete form OE2.

Where a third party is sub - contracted to provide Adventurous, Overseas or Residential Activities by the organising provider they should also complete form OE2.

**Satisfactory completion of this form and confirmation of the suitability of the provider from the LA must be obtained prior to contracts being signed or deposits paid.**

CYPS Establishment / Project		Leader in charge:	
Date(s) of visit:		Name of provider:	

The provider providing services as outlined above is asked to give careful consideration to the statements below and INITIAL in the space at the end of the STATEMENT that the standard of service provided will meet the conditions listed. Indicate by a cross any you cannot meet. Write N/A against any specifications which do not apply to your provision

**SECTION 1 – INSURANCE**

The provider has Public Liability Insurance for at least £5 million with a clause giving “indemnity to principal” for the duration of the visit .

A copy of the Certificate of Insurance MUST be provided with this form.

The provider has Employers Liability Insurance for at least £10 million.

A copy of the Certificate of Insurance MUST be provided with this form.

**SECTION 2 – LoTC QUALITY BADGE**

Has your organisation applied for and been granted a ‘Learning Outside the Classroom’ Quality Badge?

If **YES** please indicate the date granted and any other relevant information in the space below

**Holders of these Quality badges only need to complete the contact information section at the end of this form.**

If **NO** please complete the next sections

Health, Safety and Emergency procedures

2. 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 that are available for inspection

2. Accident and emergency procedures are maintained and records are available for inspection.

Vehicles / Drivers

4. All vehicles are roadworthy and meet the requirements of the relevant regulations.

4. All drivers hold appropriate licences and have undertaken relevant driver training for the vehicles used.

Staffing

5. All reasonable steps are taken to check staff who have access to young people for relevant criminal history and suitability for work with young people.

6. There are adequate and regular opportunities for liaison between Trafford staff and the provider's staff and there is sufficient flexibility to make radical changes to the programme if necessary and the reasons for such changes will be made known to Trafford staff.

## Activity Management

7. 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
8. The provider maintains a written code of practice for activities which is consistent with relevant National Governing Body guidelines.
9. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be undertaken or staff have had their competences confirmed by an appropriately experienced Technical Adviser.
10. Where there is no National Governing Body for the activity, operating procedures, staff training and assessments requirements are explained in the provider's code of practice.
11. Participants will at times have access to a person with a current first aid qualification. Staff are practiced and competent in accident and emergency procedures.

## Supervision

12. There is a clear definition of responsibilities between providers and visiting leaders regarding supervision and welfare of participants.
13. Where the placement is for an individual young person an agreed policy is in place for contact with the CYPS Establishment in case of emergency.

## Equipment

14. All equipment used in activities is suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks where necessary.

## Inclusion

15. The provider will take all reasonable steps to allow inclusion and participation of any young people who have special needs or have a disability, following a risk assessment process, in line with Equality Act 2010

## Sustainability

16. The provider encourages responsible attitudes to the environment as an integral part of the programme.

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If any of the above specifications cannot be met or are not applicable, please give details:

Details of any other accreditation with National Governing Bodies, tourist boards etc

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

Name in capitals: \_\_\_\_\_ Position in organisation: \_\_\_\_\_

Name and address of provider or tour operator: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Thank you for completing the form. Please return to the leader at the CYPS Establishment or project named overleaf.**

CYPS Establishments and Projects should contact the Trafford Adviser for Outdoor Education and Educational Visits for advice on the information provided on the form.

Telephone: 0161 911 8651

E-mail [steve.berry@trafford.gov.uk](mailto:steve.berry@trafford.gov.uk)

**TRAFFORD COUNCIL  
CHILDREN AND YOUNG PEOPLES SERVICE**

**EDUCATIONAL USE OF COMMERCIAL CAMPSITES AND BUNKBARNS / BUNKHOUSES**

When considering using a commercial campsite, bunkbarn or bunkhouse for an off-site or educational visit CYPS Establishments and Projects must seek written assurances that the provision complies with the Trafford 'Guidelines for Off-Site and Educational Visits'

Where a 'toilet & tap' site is to be used please refer to the above guidance document.

It is not feasible for Trafford Council to visit every commercial campsite, bunkbarn or bunkhouse likely to be used by CYPS Establishments and Projects from Trafford and the following questions are directed at providers.

**Satisfactory completion of this form and confirmation of the suitability of the provider from the LEA must be obtained prior to contracts being signed or deposits paid**

School /Youth Service Project		Leader in charge:	
Date(s) of visit:		Name of provider:	

**Those providing services as outlined above are asked to give careful consideration to the statements below and sign in the space at the end of the form that the standard of service provided will meet the conditions listed.**

**Indicate by a cross any you cannot meet.**

**Write N/A against any specifications which do not apply to your provision.**

Space is also provided for details to be given of any licenses or approval schemes held by the campsite/ bunkbarn.

Certificates and documentation should be available for inspection on request.

**1) GENERAL INFORMATION**

The campsite / bunkbarn have a stated code of conduct for visiting groups that is provided in advance of any booking.

There is a resident warden on site.

If not, there are arrangements made for contacting them during the stay.

There is access to a telephone in an emergency.

The campsite / bunkbarn is accessible by coach.

**2) DOMESTIC ARRANGEMENTS**

Adequate shower, washing facilities and toilets are available.

A drying room is available.

Laundry facilities are available.

Dish washing facilities are available.

**3) FIRE PRECAUTIONS**

**A current fire certificate covers indoor accommodation or advice has been sought from a fire officer and implemented and a fire risk assessment has been completed.**

**A system is in place to warn of fire and evacuation details are adequately posted.**

**4) YOUNG PEOPLE WITH SPECIAL NEEDS**

The provider will take all reasonable steps to allow inclusion and participation of any young people who have special needs or have a disability, following a risk assessment process, in line with the Equality Act 2010

**5) PUBLIC LIABILITY INSURANCE**

**The provider has public liability insurance for at least £5 million with a clause giving "indemnity to principal". A copy of the Certificate of Insurance to be attached.**

**6) CAMPSITE SPECIFIC QUESTIONS**

The campsite holds an operating license.

Where this is the case please attach details.

There is a specific area of the site for use by groups e.g. a separate group field.

There is a room available for use in bad weather.

There is a shop on site.

The campsite area is used for occupational reasons, e.g. a working farm.

Please outline this use.

**7) BUNKHOUSE / BUNKBARN SPECIFIC QUESTIONS**

The bunkhouse / bunkbarn holds an operating license.

Where this is the case please attach details.

There are appropriate security arrangements to prevent unauthorised persons entering the accommodation.

**Separate male and female sleeping accommodation and washing facilities are provided and staff accommodation is close to the young people.**

**Bed linen is provided.**

Adequate facilities are provided for self-catering.

It is possible for the group to have exclusive use of the accommodation during their stay.

There is a shop on site.

The bunkhouse area is used for occupational reasons, e.g. a working farm.

Please outline this use.

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If any of the above specifications cannot be met or are not applicable, please give details:

Signed: \_\_\_\_\_

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

Name in capitals: \_\_\_\_\_

Position in organisation: \_\_\_\_\_

Name and address of provider: \_\_\_\_\_

Tel: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

**Thank you for completing the form. Please return to the leader at the school / youth service project named overleaf.**

CYPS Establishments and Projects should contact the Trafford Adviser for Outdoor Education and Educational Visits for advice on the information provided on the form.

Telephone: 0161 911 8651

E-mail [steve.berry@trafford.gov.uk](mailto:steve.berry@trafford.gov.uk)

**TRAFFORD CHILDREN AND YOUNG PEOPLES SERVICE**

**GENERIC RISK ASSESSMENT**

**ESTABLISHMENT: ANY SCHOOL**

**ASSESSMENT DATE:**

**ACTIVITY / VENUE: URBAN FIELDWORK**

**COMPLETED BY:**

**ACTIVITY OBJECTIVES:**

**DATE REVIEWED:**

<b>1. Hazard</b> <i>List significant hazards which may result in serious harm or affect several people</i>	<b>2. Risk</b> List possible risks associated with these hazards	<b>3. Who might be harmed?</b> List groups of people who are especially at risk from the hazards identified.	<b>4. Is the risk adequately controlled?</b> List existing control measures or note where the information may be found. (e.g. Information, instruction training, systems or procedures)	<b>5. What further action required?</b> List the risks which are not adequately controlled and proposed action where it is reasonably practical to do more
Transport to and from venue	Traffic Accident Vehicle fire	Children Helpers Staff	Organisers and leaders familiar with TMBC Visit guidelines. Use reputable coach company or minibuses in accordance with TMBC Safe Transport Policy. Police disclosure checks made for significant helpers	INFORMATION MAY BE REQUIRED FOR GROUP / SITE / ACTIVITY SPECIFIC RISK ASSESSMENT
Road traffic	Traffic Accident	Children Helpers Staff	Known area – subject to preliminary visit. Provide a detailed briefing on points of danger. Allocation of staff to known points of danger.	
Working Environment – group visibility	Individuals lost or separated	Children	Work in defined groups at all times. Closely defined working area. Designate meeting points.	
Incident / Emergency	Accident / Injury Illness	Children	All students carry emergency telephone contact number. Appropriate management and use of staff. Medical and behavioural conditions known to staff.	
Working Environment – public areas	Incidents involving members of the public	Children Staff Other Users	Known area – subject to preliminary visit Appropriate briefing of students on codes of behaviour. Defined roles and responsibilities for all staff.	
Weather extremes	Cold Heat Wet	Children Helpers Staff	All party to carry protective clothing – according to time of year and outlined in appropriate guidance	

This generic risk assessment is designed to prime consideration of a simplified Site/Activity/Group specific Risk Assessment carried out by the Educational establishment and attached to this form.

**RISK ASSESSMENT**

**ESTABLISHMENT:**

**ASSESSMENT DATE:**

**ACTIVITY / VENUE:**

**COMPLETED BY:**

**ACTIVITY OBJECTIVES:**

**DATE REVIEWED:**

<b>1. Hazard</b>  <i>List significant hazards which may result in serious harm or affect several people</i>	<b>2. Risk</b>  List possible risks associated with these hazards	<b>3. Who might be harmed?</b>  List groups of people who are especially at risk from the hazards identified.	<b>4. Is the risk adequately controlled?</b>  List existing control measures or note where the information may be found. <i>(e.g. Information, instruction training, systems or procedures)</i>	<b>5. What further action required?</b>  List the risks which are not adequately controlled and the proposed action where it is reasonably practical to do more

What is your review procedure?

## Use of a private car to transport young people

<b>1</b>	To: The Head of _____ Establishment
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**I confirm that I am willing to use my own vehicle for transporting young people on educational visits. I accept responsibility for maintaining appropriate insurance cover (see below). I have a current valid driving licence and will ensure that my vehicle is legal and roadworthy in all respects.**

<b>2</b>	Signed: _____ Print name: _____
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<b>3</b>	Address: _____ _____ _____ _____
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<b>4</b>	Date: _____
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The LA and the establishment reserve the right at any time to request copies of any relevant documentation i.e. Registration Document, MOT, Insurance, Driving Licence

	<b>Insurance cover required</b>
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>

## 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 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 or fatality, and/or is likely to attract media attention, the Visit Leader should adopt the following protocol:

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** (0161 912 2020) and request the help of the Emergency Response Team.

**Trafford Council Emergency Contact  
0161 912 2020  
or if abroad +44 161 912 2020**

Ask for the Emergency Response Team

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

You will be called back within 30 minutes so try not to make outgoing calls until contact is made. You will be given advice and asked what the LA can do to support you.

Then:

- 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 coordinate all necessary actions;
- 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.
- Wherever possible, prevent group members from using telephones or 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 do this;
- Contact the British Consulate / Embassy if abroad.

Name	Home	Mobile
Establishment		
LA Emergency Call Centre (for <b>initial</b> contact during an emergency only)	<b>0161 912 2020</b>	-

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)

This 'card' must remain with the establishment emergency contact(s) at all times

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.

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 that 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 within 30 minutes;

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 Trafford Council on 0161 912 2020 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 within 30 minutes;
- 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 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; provide links with the media, rescue agencies, tour operators, insurance companies, etc. 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		
Trafford Council Emergency Call Centre (for <b>initial</b> contact during an emergency only)	<b>0161 912 2020</b>	-

Chair of Governing Body (optional)		
Other/EVC		

# Contacts

<b>Outdoor Education Adviser</b>	Steve Berry 0161 911 8651
<b>Health &amp; Safety</b>	Health & Safety Unit 0161 912 4295
<b>Insurance</b>	Council Insurance Officer 0161 912 4388
<b>The Duke of Edinburgh's Award</b>	The Duke of Edinburgh Award Officer 0161 911 8651
<b>Press &amp; Public Relations</b>	Press & Public Relations Officer 0161 912 4082
<b>LA Emergency Contact (24 hour)</b>	Trafford Council 0161 912 2020

Further copies of this document may be downloaded from EVOLVE [www.traffordvisits.org](http://www.traffordvisits.org)

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)

