

LEARNING OUTSIDE THE CLASSROOM & OFFSITE VISITS POLICY & GUIDANCE



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Introduction

1. Safely managed educational visits, with a clear purpose are an indispensable part of a broad and balanced curriculum and a vibrant part of The Rodillian Multi Academy Trust (“the Trust”).
2. They are an opportunity to extend students’ learning and to enrich their appreciation and understanding of themselves, others, and the world around them. They can be the catalyst for improved academic performance, a lifetime interest or in some cases professional fulfilment; they are to be encouraged.
3. All educational visits must be planned in a timely manner in accordance with this policy. Risk Assessments must be adapted to ensure that they meet the needs of the trip/activity.

Purposes of this Policy

4. To ensure that every student can benefit from educational visits.
5. To ensure all visits are safe, purposeful, and appropriate to meet the educational needs of students taking part.
6. To enable the Trust and the Academy to identify appropriate functions, responsibilities, training, support and monitoring for the Trust Board, Chief Executive, Academy Principals, Director of Human Resources, Facilities and Health & Safety Manager, staff, helpers, students, and providers involved in educational visits.
7. To use “Offsite Visits-Operational Procedures”, keeping up to date with further advice.
8. To meet Departmental for Education (“DfE”) entitled [‘Health & Safety of Students on Education Visits’](#) and [Health and safety responsibilities and duties for schools.](#)
9. To ensure where appropriate, further advice is sought from the relevant professional from the Trust Central Team.

The Legal Framework

10. The [Health and Safety at Work etc. Act 1974](#) requires the Trust as an Employer to do all that is reasonably practicable to ensure the health, safety, and welfare at work of employees and non-employees who are affected by their undertaking. This includes off-site activities.
11. Under the [Health and Safety at Work etc. Act 1974](#) and the [Management of Health and Safety at Work Regulations, 1999](#) require that employers:
 - Produce a health and safety policy linked to risk assessment.
 - Have in place systems for reporting accidents and incidents.
 - Produce and implement risk assessments.
 - Develop measures to control those risks including training and the provision of

- information.
- Appoint people competent to carry out specific tasks.
 - Develop emergency procedures.
 - Monitor and review procedures and practice.
12. The [Management of Health and Safety at Work Regulations 1999](#) places a duty on the Trust as an organiser of curriculum events outside of the classroom to carry out a suitable and sufficient risk assessment of the various activities undertaken, and to ensure that if other persons (e.g. instructors) take charge of activities, then those persons should provide a suitable and sufficient a risk assessment for those activities.
13. The Common law expects people acting ‘in loco parentis’ (acting in place of a parent) to take the same care as would a reasonable and careful parent. This duty applies to all educational visits and off-site activities and cannot be delegated. The principle applies to all young people in a Trust Academy.
14. There is a higher duty of care on teachers and other professional staff because of greater knowledge they are assumed to have of children and of specialised activities. The level of judgement expected of staff is related to that individuals’ knowledge, experience, and training.
15. In the event of an accident and any Health & Safety Executive (“HSE”) intervention documentation will be assessed as evidence to establish if the organisation did or did not take reasonable care. If the conclusion is that the organisation did not take reasonable care, the group leader, Academy Principal and/or The Trust could be prosecuted. A key part of any investigation would be whether the employers’ health and safety policy and procedures are adequate and had been followed by its employees.

Scope and Applicability of this Policy

16. This Policy and Guidance is applicable to all Educational Visits undertaken by Trust staff and students.

Roles and Responsibilities under this Policy

The Central Trust Team

17. The Central Trust Team will make this Policy available to all Academy and Trust staff.
18. The Human Resources Director will ensure training, advice and support related to the management of visits is provided to appropriate staff.

The Trust Board

19. The Trust Board will delegate the approval levels needed for the various activities conducted under this policy.
20. Ensure there is a clear procedure for action in the event of an emergency.

21. Ensure there are sufficient procedures in place to monitor and review safety on activities mentioned in the policy.

The Chief Executive and Academy Principals

22. The Chief Executive and Academy Principals will ensure this policy is always adhered to.
23. Ensure that staff leading and accompanying visits have the required training, competence, and requirements.

Educational Visits Co-ordinator ("EVC")

24. Each Academy Principal should appoint an EVC.
25. The Academy EVC will:
 - Ensure that they are up to date on the current legislation and that they attend the required training including refresher training.
 - Identify and record with the minimum paperwork, qualifications, training, development, induction, and apprenticeship arrangements for all visit leaders.
 - Approve visit leadership, planning checklist, risk assessment, management, and evaluation of all visits.
 - Ensure that the required information is correct on the Evolve system prior to seeking approval.
 - Have sufficient competency, practical experience in leading and managing a range of visits like those typically run by the Academy.

Visit Leader

26. There will be a named Visit Leader (and where appropriate, a deputy) on all visits.
27. The Visit Leader will:
 - Have attended the required training/support with the EVC prior to leading a visit.
 - Gain approval from the Academy Principal as required.
 - Ensure that all the required information is uploaded onto Evolve and that the required information is held on Evolve prior to submitting the trip for checking by the EVC.
 - Ensure sufficient staff and helpers of the right experience are checked (DBS if appropriate) and briefed prior to and throughout the visit.

- Ensure that there is the correct ratio of staff/adults to students prior to the visit taking place.
- Ensure risk assessment and management including generic, site specific and on-going are undertaken and recorded.
- Ensure that **ALL** the staff and adults attending the off-site activity/visit have read and understood all the risk assessments prior to and during the visit.
- Ensure Best Value principles are used when selecting providers, appropriate checks are made, insurance and financial support procedures are followed.
- Ensure that **ALL** the staff and adults attending the off-site activity/visit have read and are aware of any students' medical needs/dietary needs/allergies and care plans (where applicable) prior to and during the visit, ensuring that risk assessments are amended where necessary to accommodate specific needs.
- Ensure that the School Management Information System ("SIMS") is checked with the relevant Pastoral Leader to ensure that the student information is correct.
- Ensure that there is a qualified first aider within the staff attending and/or at the visit location. In an emergency the visit leader will contact the local emergency services, parents, leadership and the EVC at their academy immediately.
- Ensure a named person, emergency procedures and systems for recording and sharing information on accidents and near misses are in place before briefing students and parents.
- Ensure that they are aware of any safeguarding or Special Educational Needs and Disability matters relating to students, prior to attending a trip and they must advise colleagues supporting, as they deem appropriate to safeguarding the individual student and others.
- Where possible, undertake exploratory visits or seek references from other Academies if using new venues.
- Ensure that they have emergency contact details for **ALL** students prior to the trip taking place.
- Ensure that **ALL** parental consents have been received prior to the trip taking place which will include details of medical information, any allergies, emergency contact information and any information specific to the student which may affect their ability whilst attending the trip (e.g. swimming ability)
- Ensure that all staff know to pass on any Cause for Concerns from students directly to themselves as the trip leader, should they occur whilst on the visit. The visit leader will then be responsible for passing on any Cause for Concern' to the relevant Academy through CPOMS if possible, to be dealt with appropriately following the Trust Child Protection Policy. With any Cause for Concern the visit leader must notify the Emergency Contact within their Leadership Team, who will then notify the Chief Executive and the Director of HR.

- Continually risk assess during the visit and encourage all staff and students to take an active role in this process.
28. In the event of a serious medical emergency, the trip leader will notify the Emergency Contact within their Leadership team of their Academy, who will then notify the Chief Executive, the Director of HR and the Facilities and Health & Safety Manager of the Trust. The Visit Leader will also notify the parent/carer of the student as soon as possible and keep them updated as necessary.

Parents

29. Parents will:
- Be given sufficient written and other information about all visits to make informed decisions and give written consent, medical and contact details.
 - Parents will be given the link to the 'Learning Outside the Classroom' website (www.lotc.org.uk) with details of the practice we follow.
30. Where appropriate, for high risk residential and foreign visits meetings with parents will be arranged.
31. Expectations of behaviour and codes of conduct will be explained to parents. This will include the need to meet the cost and plan for collecting children in certain circumstances.

Students

32. Students should be briefed about aims, expectations and codes of conduct for all visits. On-going briefings are an important part of learning and safety.
33. Where possible students should be involved with planning, developing codes of conduct, assessing/managing risk and evaluating their own attitude, behaviour, development, and learning.
34. Students will be made aware of the names of staff with key responsibilities to help and assist as necessary on the visit e.g. The trip leader; First Aider etc.

Off-site Academy Activities or Trips Risk Assessment and Approvals needed.

35. Regular and routine day visits with no additional significant hazards such as local sports fixtures, requires parental consent, risk assessments placed on Evolve, and approval from the Academy Educational Visits Co-ordinator ("EVC"). (Category 1 visits)
36. Day visits with no adventurous activities such as visits requiring transport, one off visits, visits requiring enhanced planning such as swimming or other water activities requires Category 1 approvals plus Principal approval. (Category 2 visits)

37. Residential visits which include an overnight stay, camping, overseas or adventurous activities require Category 2 approvals plus Trust Board and Local Authority approval. (Category 3 visits).
38. Category visits need to be planned and approved at least 6 weeks before they take place Inc. risk assessments.
39. Approvals required:
- | | |
|---------------------------------|---|
| Overseas: | Trust Board Approval, LRB advised. |
| Residential: | Trust Board Approval, LRB advised. |
| Adventurous (Externally Led): | Trust Board approval and LRB advised. |
| Adventurous (Led by Own Staff): | Approval delegated to Principal (Trust and LRB advised) |
| None of the Above: | Approval delegated to Principal. |
40. All Trust staff and Academies/settings undertaking educational visits must follow the system of approval outlined in this policy except where specifically agreed with The Chief Executive.
41. All off site visits approval must be recorded on EVOLVE. Trust staff should also use EVOLVE for other visits where there may be additional risks (e.g. long-distance travel, water margin hazards, extended time away from the Academy/setting), as this will provide good evidence of planning and approval.
42. **Failure by staff to follow the health and safety policy and procedures of an employer is a breach of the [Health & Safety at Work etc. Act 1974](#) and a criminal offence.**
43. **Following a serious incident or tragedy a civil case for negligence against an employee is likely to use failure to follow an employer's policy and guidelines as evidence of a breach of the duty of care towards the injured party.**
- All visits should be approved by the EVC and Academy Principal. The EVC will obtain approval from the Academy Principal. The Academy Principal should ensure where necessary approval is sought from the Trust Board
44. The Trust Board expect the EVC, Academy Principal and Chief Executive (where applicable) to exercise appropriate professional judgement when approving visits, and that expect advice is sought when necessary.
45. Delegated approval of activities mentioned in this policy is conditional upon compliance with this policy. The EVC must keep a record of visits, details of which may be requested by the HR Director and/or the Head of Governance and Compliance.
46. The process to be followed for all visits is detailed below:
1. Visit leader proposes the visit to the Academy EVC
 2. If an External Provider, Activity Centre, or Tour Operator is to be used then complete and retain provider paperwork.
 3. Initial approval, in principle, should be sought from the principal.
 4. A financial plan must be agreed with finance before any communication with parents.

5. If staff are leading adventurous activity, a Risk Assessment should be completed. Approval of the Risk Assessment is needed by the EVC, Academy Principal. The Trust Chief Executive, Finance and Resources Committee of the Trust Board and the Local Review Board should be informed of the activity. The EVC and the Academy Principal should consider the competence of the Visit Leader.
6. Parental consent should be obtained and Parents or volunteers going on the trip should be checked.
7. The finance Team should be kept informed, as per point 173 in the financial regulations (see appendix 1)
8. If Trust approval is necessary, it should be obtained. Once it is the visit can go ahead with continual assessment of risks on an ongoing basis.

Adventurous Activities

47. Adventurous Activities include:

- All activities in 'open country' – any activity (hill walking, mountaineering, fieldwork, biking etc.) on moorland (open uncultivated land) at any height or mountainous ground over 600 metres above sea level **or** at any height where it would take 30 minutes to reach an accessible road or refuge.
- Swimming (all forms except publicly life guarded pools)
- Camping (including Duke of Edinburgh's Award Expeditions)
- Canoeing/kayaking/rafting/improvised rafting
- Sailing/windsurfing/kite surfing
- Use of powered safety/rescue craft
- All other forms of boating (except commercial transport)
- Water skiing
- Snorkel and aqualung activities.
- Rock climbing (outdoor) and related mountaineering activities, river/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration
- Off-site mountain biking and
- Any other activities involving skills inherent in any of the above or that may contain a similar level of risk to participants or staff.
- lowland trail riding
- Road cycling (except as part of Bike ability, cycling proficiency or similar programme)
- Skiing, snowboarding and related activities.
- Air activities (excluding commercial flights)
- Horse riding
- Quad bikes, off-road buggies
- High level ropes courses
- 'Extreme' sports
- Water based activities.
- Adventurous activities with the armed services
- Indoor sky diving
- Nordic Walking
- Ice Fishing
- Snow mobile activities

48. The following visits are not regarded as adventurous and therefore do not require approval by the Chief Executive and Finance and Resources Committee unless they are being undertaken as part of an Overseas or Residential Trip. They do still require supervision by a member of staff who has previous relevant experience and/or who has been assessed by the EVC and Academy Principal as competent to supervise the activity:

- Walking in parks or non-remote country paths
- Field studies (unless in the environments defined as adventurous)
- Swimming in publicly life guarded pools
- Theme parks (e.g. Alton Towers, Adventure Valley etc.)
- Tourist attractions
- Pedal go-carts
- Motorised go-karts at commercial venues
- Paint balling and laser quest type activities.
- Archery clubs
- Indoor rock climbing/bouldering provided by a leisure Centre or similar commercial venue.
- Ice rink skating.
- Farm visits
- Local traffic surveys
- Museums, libraries etc.
- Physical education and sports fixtures
- Dry ski slope activities
- Trampoline parks.
- Tubing
- Bush craft
- Water margin activities – such as walking along a riverbank or stream (including paddling in the sea), collecting samples from streams and ponds, or paddling in gentle shallow (up to the knees) water. If the activity exceeds this definition the activity is water based and therefore adventurous.

Staff involved in water margin activities should be conversant with the guidance contained in the OEAP publication '[Group Safety at Water Margins](#)'.

Competence to Lead

49. The single most important factor in ensuring the safety of participants involved in an educational visit or activity is the competence of the visit leader. The EVC and Academy Principal should therefore consider the following when assessing the competence of a member of staff to lead a visit:

- What is the leader's reason for undertaking the visit?
- Is the leader an employee?
- Has the leader a real sense of responsibility, extending beyond the teaching of the subject to concern for the participants well-being?
- Does the leader possess the necessary organising ability?
- Is the leader competent in risk assessment and risk management?
- What experience has the leader in leading, or assisting in the leading of similar visits or

activities?

- What experience has the leader of the environment and geographical area chosen?
- Does the leader possess appropriate qualifications?
- If appropriate, what is the leader's personal level of skill in the activity, and fitness level?
- Is the leader aware of, and able to comply with, all relevant guidelines?

50. The Academy should contact the HR Director if there is doubt regarding the competence of a member of staff to lead an educational visit. Access can be given to independent technical experts to assist in making decisions on competence to lead, especially for adventurous activities. A matrix of recommended staff competency/qualification is available on Evolve.

Adventurous Activities for Which There Are No Specific National Qualifications

51. In the absence of formal, recognised qualifications for some adventurous activities, it is good practice for visit leaders to hold qualifications in closely related activities. The level of the qualification required needs to be matched to the levels of hazard and risk. Visit leaders wishing to lead such activities must seek full approval from their EVC, Academy Principal, and HR.

Supervision & Staffing Ratios

52. Young People on visits must be adequately supported and always supervised. The level of supervision should be based on risk assessment for the specific visits, and will be determined by such factors as:

- The type, risk, and duration of activity
- The nature and requirements of individuals within the group, including consideration of special and additional needs.
- The experience and competence of staff and other adults
- The venue, time of year and prevailing/predicted environmental conditions.
- The contingency or Plan B options.

53. The visit leader, EVC and Academy Principal should make a professional judgement regarding the appropriate level and suitability of staffing for every visit. A visit must not go ahead where any of the above persons are not satisfied that an appropriate level of supervision exists.

54. The following ratios are a guide and do not overrule or replace professional judgement of the visit leader, EVC and Academy Principal:

Lower Risk Activities (where the risk is similar to everyday life):

- Key Stage 2 students - 1 adult to every 10 – 15 students
- Key Stage 3,4, & 5 students - 1 adult to every 15 – 20 students

Higher Risk / Adventurous / Residential Visits:

- Key Stage 2 students - 1 adult to every 6 – 10 students
- Key Stage 3, 4, & 5 students - 1 adult to every 10 – 15 students

Remember – The visit leader is responsible for the group at all times.

55. It is good practice for each supervisory adult to:
- Have a clear plan of the activity to be undertaken and its educational objectives.
 - Have a reasonable knowledge for the young people involved, including any **special educational needs, medical needs, or disabilities**.
 - Possess prior knowledge of the venue.
 - Carry a list/register of all group members and know who they are responsible for.
 - Regularly check the group (head count etc.).
 - Have the means to contact the visit leader if help is required.
 - Continually monitor the appropriateness of the activity, the physical and mental condition and abilities of the group and the suitability of the prevailing weather conditions etc.
 - Clearly understand the emergency procedures and have access to a first aid kit.
 - Visit leaders should provide a full briefing to accompanying adults prior to the visit.

Down Time

56. Visit leaders should ensure that children and young people continue to be properly supervised before, between and after activities, including lunch periods and the evenings on residential visits etc.

Remote Supervision

57. If the aim of visits for young people is to encourage independence and investigative skills, some of the time on visits may be supervised from a distance. The visit leader must establish during the planning stage whether young people are competent in remote supervision and must ensure parents have agreed to this part of the visit. The group leader must ensure:
- Children and young people are made aware of ground rules and are adequately equipped to be on their own or in a small group.
 - Children and young people have telephone number or other suitable means of contacting the visit leader of lost, either by mobile or identified local telephones.
 - They have maps, plans and other suitable information for them to act effectively and know how to summon help.
 - In enclosed areas, such as theme parks, children and young people know where and when to meet supervising adults – at key locations and set times.

Remote Supervision during Adventurous Activities

58. The training given to young people must be sound and thorough. The instructor should have appropriate qualifications and experience to provide clear guidance for each activity. The group leader should be satisfied that young people have acquired the necessary skills and have the necessary experience, confidence, physical ability, and judgement to be left without direct supervision. Guidance in this document must be followed for all Duke of Edinburgh's Award Expeditions.

NB for all educational visits and off-site activities the group leader remains fully responsible for all children and young people, even when not in direct contact with them.

Teachers and Other Employees Children Accompanying Visits

59. It is acknowledged that some employees and volunteers could not help in educational visits unless their own children accompany them. Visit leaders and helpers who bring additional children will have potential conflicts of responsibility, which could have consequences for supervision levels and group safety. It is therefore essential that EVC's and Academy Principals consider the implications of such requests and those arrangements do not compromise the safety of other group members. Where agreements are made to allow staff to bring their own children on a visit, this arrangement should be communicated to the parents of the other young people and identified in the risk assessment.

Information for Parents, Guardians and Carers

60. Written consent from parents is not required for students to take part in most off-site activities organised by an Academy as most of these activities take place during school hours and are a normal part of a child's education. However, parents should be told where their child will be always and of any extra safety measures required.
61. Written consent is required for activities that need a higher level of risk management or those that take place outside school hours. Again, parents should be told where their child will be always and of any extra safety measures required.
62. Consent is needed for all visits organised by establishments other than schools.
63. Academies must seek consent separately for a particular visit, especially for residential visits and adventurous activities. The original EV4 consent form for a specific visit is available on Evolve. Further guidance on parental consent can be found in the [OEAP Document 4.3d Parental Consent](#).
64. Information to parents should include:
- Dates.
 - Objectives of visit or activity.
 - Times of departure and return, including location for meeting parents.
 - Method of travel including name of any travel company.
 - Accommodation with address and telephone number, including details of host families for exchange visits.
 - Emergency contact arrangements at home and away if all young people are not at one centre. Consider the value of a 'telephone tree' to make easy and rapid contact with a large group of parents, e.g. regarding changed transport arrangements.
 - Name of visit leader and accompanying staff.
 - Names and status (e.g. parent) of other accompanying adults who will exercise some responsibility during the visit.
 - Details of activities planned. Any activity involving special hazards must be clearly specified.
 - Charges or voluntary contributions; what they cover and do not cover.
 - Methods of payment and cancellation arrangements.

- Insurance for the group members in respect of baggage, personal accident, cancellation, and medical cover. Send a photocopy of the insurance schedule to all parents or state that a copy of schedule may be obtained from the group leader.
 - Clothing/footwear and other items to be taken. Prohibited items.
 - Money to be taken.
 - Code of conduct; details relating to the standard of behaviour expected from the group during the visit; including for example, rules on general group discipline, smoking, sexual behaviour, illegal substances, and alcoholic drinks.
 - Parents should have sufficient information to give informed consent and give written consent for emergency medical treatment.
65. Visit leaders should appreciate the benefits of inviting parents to a planning meeting, particularly where a residential experience is involved, visits abroad or where the activity constitutes a 'new direction' for the group members or the Academy. There is then the opportunity for all involved to be fully informed and to raise issues which may be difficult to put down in writing.

Child Protection / DBS

66. All employees and volunteers over the age of 16 involved in educational visits with young people will require Disclosure Barring Service (DBS) clearance where:
- Planned contact with the students will take place once a week or more.
 - Planned contact takes place on 4 or more occasions in a 30-day period.
 - Planned contact takes place overnight between 2.00am and 6.00am.
 - DBS checks must be renewed every 5 years.

Equality Act 2010 and Medical Needs

67. It is unlawful for any Academy to discriminate against disabled participants (current and respective) because of their disability, without justification – which must be both material and substantial to the case. You are required to make reasonable adjustments to avoid disabled participants being placed at a substantial disadvantage.
68. [The Equality Act 2010](#) does not require responsible bodies to place employees or participants at risk to make reasonable adjustments. In all cases compliance with the [Equality Act](#) must not be achieved by breaching the [Health & Safety at Work Act etc. 1974](#) i.e. reasonable adjustments must not place employees or others at unacceptable risk of injury or ill health.
69. Visit leaders and other adults should be aware of all the children and young people's medical needs and any medical emergency procedures. If required, a member of staff should be trained in administering medication and to take responsibility in a medical emergency. If the young person's safety cannot be guaranteed, it may be appropriate to ask the parent or carer to accompany a particular young person.
70. Enquiries should be made at an early stage about access and facilities for securing wheelchairs on transport and at residential centres.

71. The Visit leader should also assess whether client manual handling skills will be needed, and if so, whether training should be sought.
72. The Visit leader should check that any additional insurance policy taken out covers staff and students with pre-existing medical needs. All medical conditions should be declared to the insurance company regardless of whether they have been specifically requested. Failure to declare a medical condition will often invalidate medical/travel insurance.

First Aid

73. The Visit leader should make a professional judgement as to the level of first aid required for a particular visit. This decision could be influenced by factors such as the environment and proximity to emergency services or professional care. As a minimum, there should be a responsible adult with a good working knowledge of first aid appropriate to the environment.
74. The Emergency First Aid certificate is a basic qualification which may be suitable for routine urban visits; however, risk assessments may indicate that a higher-level qualification is appropriate in circumstances where it is likely that access by emergency services may be delayed.
75. A First Aid Kit appropriate to the visit should be carried.

Accidents on educational visits

Accidents to be reported without delay to the Academy Principal and Chief Executive	
<p>Employees Type of accident – Death or specified injuries including:</p> <ul style="list-style-type: none"> • Fractures, other than to fingers, thumbs, and toes • Amputations • Permanent sight loss or reduction in sight • Crush injury causing damage to the brain or internal organs. • Serious burns (including scalding) • Scalping which requires medical treatment. • Loss of consciousness caused by head injury or asphyxia. • Resuscitation or admittance to hospital 24hrs 	<p>Non-employees including –</p> <ul style="list-style-type: none"> • Children and young people • Volunteers <p>Type of accident –</p> <ul style="list-style-type: none"> • If the person in our care is killed or taken directly to hospital for treatment during the visit regardless of how they were transported to hospital.

76. The Trust’s Health and Safety Policy contains procedures on the reporting of accidents including those reportable to the Health and Safety Executive.

Insurance

77. The visit leader, in conjunction with the EVC/Academy Principal must be fully satisfied that adequate insurance cover has been obtained before approving any visit.

Employers Liability & Public Liability Insurance

78. Enquiries about Employers Liability and Public Liability Insurance should be raised with the Director of Finance.

Personal Accident/Travel Insurance

79. Young people and staff are not insured for personal accident benefits while on education premises or during educational visits. Similarly, there is no automatic insurance cover for the loss of personal property or belongings.
80. Visit leaders may feel it appropriate to arrange this type of insurance cover for young people as well as accompanying staff and adult volunteers.
81. Some national governing bodies of sport offer personal accident insurance for groups participating in certain sports.
82. If the educational visit has been arranged via a travel company this cover can often be negotiated at reasonable additional cost as part of the travel package. If so, care should be taken to check the terms and conditions of the insurance and the activities that are covered or excluded.
83. For overseas visits additional travel insurance needs to be arranged – overseas visits are not covered by the Trusts standard insurance.

Transport and Travel Arrangements

84. Parents and carers must be aware of the intended form of transport to give fully informed consent.

Guidance for Hiring Coaches and Minibuses

Local Journeys

85. The following are a few simple checks that can be carried out which will assist in deciding whether an operator is suitable to carry out your trip:
- Identify if the transport operator currently works for the Trust on home to school transport. Ask for copies of their operators' licence and insurance both. This will ensure that the operator is licensed and falls within the checks provided by Vehicle and Service Operators Agency, who regulate standards of maintenance and drivers' hours' compliance.
 - Ensure the driver of your trip has been checked by the Trust's Disclosure Barring Service.

- Does the operator check the driving licence of their drivers at least annually? Does the operator have a procedure that will provide a contingency plan should the coach break down during the trip? Ask for details if in doubt.

Long Distance and Continental Journeys by Coach

86. The following are a few simple checks that can be carried out on long distance and continental journeys:

- If booking through a tour company, ask who the coach operator will be. Tour companies do not operate their own coaches but use sub-contracted coach operators.
- Does the tour company carry out 'quality audits' on the coach operator they have booked for your trip? Ask for a copy. If not, then ask a few simple questions.
- Obtain a copy of the operators' licence and insurance details. For continental trips, operators must have an international operator's licence – Do they have one?
- Does the operator check drivers' licence at least annually?
- Will the driver(s) of your tour be DBS checked?
- Does the operator have a procedure that will provide a contingency plan should the coach break down during the trip, particularly on the continent? Ask for details if in doubt.
- On a long-distance journey, will the driver comply within EU drivers' hours' regulations? For long journeys, operators may use a feeder driver for the first part of the journey. Will the main driver(s) have had the statutory hours of rest before driving the main section of your trip?
- On continental journeys, if you are unsure of the capability of the operator ask for some examples of previous trips operated.

87. These simple checks will give you an indication of the standard of the company which you are going to use for your trip. They will also enable you to satisfy yourself as to whether your driver is qualified, insured and will be sufficiently rested before carrying out your journey.

Trust Minibuses

88. Trust minibuses can be used by staff if the following conditions are met:

- Minibuses are fully insured under the Trust insurance policy or have similar independent insurance cover (fully comprehensive, to include passenger liability with unlimited liability cover in relation to property or death and bodily injury)
- Minibuses are serviced in accordance with the manufacturer's recommendations or at least every 6000 miles or 6 months whichever is the sooner, and regular safety inspections are carried out.
- Drivers possess a current, full UK driving licence appropriate for the vehicle (category B + D1 – minibuses over 8 passenger seats)
- Drivers have received training to drive a Trust minibus.
- Drivers are over 21 years of age and have been driving for longer than 2 years.

- Drivers are volunteers and no profit is made.
- Seat belts are fitted to all forward-facing seats.
- A first aid box and fire extinguisher are carried on the vehicle.
- A risk assessment is carried out prior to all journeys.

Use of External Providers

89. Academies will regularly employ other organisations to provide an element of instruction, staffing and guiding on educational visits. In such cases an External Provider Form (EV6) must be completed unless they hold the Learning Outside the Classroom (LOtC) Quality Badge.

90. An External Provider Form is required for:

- Activity centres
- Ski companies.
- Educational tour operators
- Overseas expedition providers
- Climbing walls (where instruction is provided by climbing wall staff)
- Freelance instructors of adventurous activities
- Youth hostels where instruction is provided.
- Voluntary organisations e.g. scouts where instruction is provided.

91. An External Provider Form is not required for:

- Establishments/venues which hold a Learning Outside the Classroom (LOtC) Quality Badge
- Youth hostels where accommodation only is used.
- Hotel, B&B accommodation etc.
- Camp sites.
- Museums, galleries etc.
- Tourist attractions
- Theme parks e.g. Adventure Valley, Alton Towers and similar
- Farms
- Coach, train, or airplane companies.
- Swimming pools
- Climbing walls where instruction is provided by a member of your own staff.
- Volunteer instructors of adventurous activities.

92. Where an EV6 is required, this should be sent to the external provider well in advance of the proposed visit and before any contractual agreement is signed or financial commitment is made.

91. The decision to select an external provider is the responsibility of the EVC and Head Teacher/Service Manager. Completion of the EV6 does not necessarily signify that the venue meets the needs of your group. A pre-visit and further information, such as references, should also be used to judge a providers' suitability. Information on whether providers hold the LOtC Quality badge can be found at www.lotcqualitybadge.org.uk.

92. If the external provider makes any alterations to the wording of the form or is unwilling to comply, then you must discuss this with the provider Upload a copy of the completed External Provider Form to your Evolve submission.

Risk Assessment

93. Risk assessment is nothing more than a careful examination of what could cause real harm and suffering to people, together with an identification of the control measures necessary to reduce the risks to a level which, in the professional judgement of the person carrying out the risk assessment, is deemed to be acceptable. The process is applicable to all visits. As with all areas of health and safety you need to adopt a sensible and proportionate approach to the management of risk while planning and undertaking educational visits. For further advice please see the [Health & Safety Executive](#) website.
94. There are three 'levels' of risk assessment. (Further guidance can be found in the risk assessment section of the Health & Safety Executive website - www.hse.gov.uk/risk/controlling-risks.htm):

Generic and Venue – (normally already in place)

95. These will apply to all visits of a particular type as the nature of the visit remains constant and the same general controls will apply each time. Typically, Academies and venues will have generic risk assessments for routine visits to avoid unnecessary repetition when organising visits and to ensure that there is a consistent approach to managing risk.
96. When using generic risk assessments, the visit leader must ensure that the risk assessment is relevant to the proposed visit. The visit leaders should ensure that the controls in the generic risk assessment are in place and evaluate if this is suitable and sufficient, or if further action is necessary. This should then be signed and dated by the group leader.

Event Specific Risk Assessment (carried out before the visit takes place)

97. This considers any significant hazards or risks relating to a visit that are not covered within the generic risk assessment, and should consider the venue, activities, group, transport, plan B etc. 'Significant' implies those hazards that could result in serious harm or affect several people. The process should identify the hazards, who might be affected by them, and the measures in place to control the risks.
98. The risk assessment must be recorded (normally by the Visit Leader), using the risk assessment form EV2 (or alternative) and approved by the EVC/Academy Principal before the visit takes place.

On-going - (carried out continuously throughout the visit)

99. The on-going monitoring of all aspects of the visit by the Visit Leader and other staff is the single most important aspect of risk management of visits, and hence safety. Risks should be monitored

throughout the visit, and where appropriate activities must be modified or curtailed (e.g. Plan B) to suit changed or changing circumstances. This is the responsibility of all involved in the visit, not just the visit leader.

100. It is not necessary to record on-going risk assessments during the visit, although notes of significant events or decisions can assist the post-visit review following an incident or accident.
101. An activity should only take place/continue if, in the professional judgement of the visit leader and/or supervising members of staff, the residual risk following implementation of any control measures is deemed to be acceptable.
102. Relevant aspects of the risk assessment process should be shared with staff and helpers involved in the visit, as well as participants and where appropriate parents.
103. Participants who are involved in a visit's planning and organisation, and who are well prepared, will make more informed decisions and will be less at risk. It is therefore good practice to involve participants in the risk assessment process.

The Learning Outside the Classroom Quality Badge

104. The Trust for Learning Outside the Classroom has developed a badging scheme for provider organisations, which is respected by the DfE and the OEAP.
105. A Quality Badge will be awarded to LOtC provider who –
 - Has pledged to engage in an ongoing process to sustain high quality learning outside the classroom.
 - Has a process in place to assist users in planning the learning experience effectively.
 - Provides accurate information about its offer.
 - Offers activities, experiences and resources which meet learners' needs.
 - Reviews the experience with you and acts on feedback.
 - Manages risk effectively.
106. Further information on the Quality Badge scheme can be found on the LOtC website at www.lotcqualitybadge.org.uk.

Adventurous Activities

When provided at an outdoor centre or by a contractor

107. The [Activity Centres \(Young Person's Safety\) Act 1995](#) and the Associated [Adventure Activities Licensing Regulations 2004](#) are in place to ensure the safety of young people involved in adventure in hazardous environments. Schools and youth group planning to visit an adventure centre or employ a provider in the UK should check with the Adventure Activities Licensing Authority (AALA) on the licence status of the provider to ensure they are licensed to deliver the particular adventurous activities to young people (www.hse.gov.uk/aala).

When provided by Academy staff

108. Single Academy groups consisting of children and young people under 18 years of age and over 18's in full time education is exempt from licensing regulations and therefore do not require an AALA licence. However, such groups should follow the AALA criteria for managing safety during adventurous activities. Group leaders of single school groups are required to complete an Activity Leader Form (ALF) via the Evolve system.
109. Groups of young people from different Academies, or with other group members under 18 years of age are not exempt from licensing regulations and the school must conform with AALA requirements, including holding a licence or working under the Trust Licence where one exists.
110. The following activities (where undertaken by young people from different Academies under 18 years of age and over 18's in full time education in the Trust and unaccompanied by a parent), need an Adventure Activities Licence:
111. **Climbing** – climbing, sea-level traversing, abseiling, or scrambling over natural terrain or certain man-made structures requiring the use of special rock-climbing or ice-climbing equipment or expertise, gorge walking and ghyll scrambling.
112. **Trekking** – going on foot, horse, pony, pedal cycle, skis (not piste), skates or sledges over moorland (open uncultivated land) at any height, or on ground over 600 metres above sea level when it would take 30 minutes to reach an accessible road or refuge. Off-piste skiing also requires a licence.
113. **Caving** – the exploration of underground passages, disused mines, or natural caves which requires the use of special equipment or expertise.
114. **Water sports** – sailing, canoeing, kayaking, rafting, and windsurfing, on the sea, tidal waters including estuaries, the tidal reaches of rivers, sea lochs and harbours, inland waters at a location where any part of those waters is more than 50 meters from the nearest land, and turbulent inland waters such as weirs, rapids, waterfalls, and fast flowing currents. Rowing is exempt.

Armed Forces

115. Armed forces who offer adventure activities are not licensed by the Adventure Activities Licensing Authority. Academies planning such a visit should ensure adequate safety standards are observed in all activities and public liability insurance is in place.

Procedure for obtaining approval.

116. Approval for Trust staff to lead an adventurous activity can be gained using the online Activity Leader Form as below.
117. Staff who wish to lead (i.e. supervise or instruct) an adventurous activity must obtain approval from the Trust before the activity takes place.
118. 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 of these awards.
119. The EVC (or Visit Leader) should request approval for the visit 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 (e.g. dates, venues, numbers etc.). The ALF will then be embedded within the approval request for that visit.
120. On receipt of an approval request (and embedded ALF), the Trust will consider the proposed activity relative to the leader's stated competencies and qualifications.
121. Where approval is granted for the member for staff to lead the activity, the visit will be approved by the Trust via Evolve. Where approval is not granted, the approval request 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

122. 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 advisor'. For most activities the competence required by a technical advisor is stipulated by the activity's national governing body.
123. In some cases, approval may be granted where no qualification is held, but the person concerned is deemed by the Trust to have a sufficient level of competence, experience, attendance at training courses etc.
124. Approval will always be subject to a requirement that the leader must always operate 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 Trust, specific to the visit.
125. Where there is insufficient information for us to decide regarding approval, then the applicant may be asked to provide further information (e.g. evidence of awards, experience, logbook details, etc.). In some cases, a meeting with the applicant may be requested by the Trust Health & Safety Team.
126. The approval granted is solely in respect of a member of staff's competence 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 the Academy Principal and/or EVC.

The Duke of Edinburgh's Award

127. The guideline in this document must be used when managing expeditions and other activities relating to the Duke of Edinburgh's Award.
128. The Academy Principal is responsible for ensuring that employees are fully qualified and experienced and hold the relevant national governing body qualification for work in the outdoors.
129. The qualified and experienced leader has full responsibility for the safety of the young people whilst out on expedition. Suitably experienced and competent assistant leaders and other adults should work under the direction of the group leader and must be competent in the task they are asked to undertake.
130. All Duke of Edinburgh's Award (DofE) expeditions are regarded as 'adventurous' and require Trust approval. In addition, if groups venture into Duke of Edinburgh's Wild Country Areas, then the appropriate Network Coordinator must be notified in line with the following guidance:
- Ventures that are fully accompanied do not need to notify the Wild Country Network Coordinator.
 - Ventures that are unaccompanied for part of the venture or wholly unaccompanied, (practice or qualifying) do need to notify the Wild Country Network Coordinator.
 - Notification needs to be received 6 weeks prior to the venture if assessment is required or 4 weeks if assessment is not required. Route cards and route tracings must accompany the green notification forms.
 - A local pre check of the group is required approximately 2 weeks before qualifying ventures to confirm the competence of the group. The
 - A copy of the green expedition notification form (green form) must be sent to the DofE Awards Officer.
131. Those organising expeditions need to be aware of the conditions and guidance in the Duke of Edinburgh's Award Handbook, Programmes File and Expedition Guide. Details of the Wild Country Expedition Areas and Coordinators can be found on the Duke of Edinburgh website – www.dofe.org.

Residential Visits

132. All residential visits (apart from those venues with delegated approval status) must be submitted for Health & Safety approval, using Evolve, at least 3 weeks before the visit is due to take place. The External Provider Form (EV6) must be completed if there is an element of instruction, staffing or guiding as part of the agreement with the accommodation provider, where they do not hold the LOTC Quality Badge.
133. Mixed Groups should, where possible, be accompanied by at least 1 male and 1 female member of staff. If a responsible adult is used such as a partner, parent or student, the relevant disclosure barring service checks must be obtained. If the residential accommodation has not been used before, a preliminary visit is strongly recommended. If this is not practical, for example due to distance, the group leader should make sufficient enquiries with the accommodation to be satisfied that it will be suitable for the group involved.

134. On arrival it is advised that staff check out the accommodation, rooms, campsites etc. and report any damage to the head of the centre/manager before students access the rooms. Teachers should be accommodated on every floor where there are children or young people.
135. In the absence of 24 hours staffing of hotel/hostel reception areas, external doors and windows should be made secure to prevent unauthorised visitors or intruders. All staff and young people should be aware of the emergency procedures and escape routes in the event of fire.

Visits Abroad

136. Visits abroad provide valuable and rewarding educational experiences. Such visits require detailed planning and preparation. Group leaders should seek to ensure they use the services of a reputable tour operator experienced in group travel. Air travel organisers may be licensed through Air Travel Organisers License (“ATOL”) for all or part of a package. This licence is a legal requirement and provides security against a licence holder going out of business. It is recommended that establishments use tour companies which are members of a Department for Business, Energy and Industrial Strategy approved bonding body, such as the association of British Travel Agents (“ABTS”) or the Association of Independent Tour Operators (“AITO”). Ensure you have ready access to your insurance company telephone number. The [Package Travel Regulations 1992](#) may apply. Where schools independently provide a package, they should ensure they act within the regulations.

137. In addition to Planning Checklist group leaders should:

- Ensure the External Provider Form (EV6) is completed, where required, if there is an element of instruction, staffing or guiding as part of the agreement with the tour operator.
- Identify whether there are medical requirements imposed by the country to be visited.
- Ensure the group has comprehensive travel insurance covering all proposed activities.
- Enquire about insurance cover should a parent need to travel out to the resort because of an accident/incident involving their child. Some policies provide cover for only 1 parent to travel whilst others will pay for both parents. These details must be shared with parents prior to the departure of the group.
- Ensure all children and young people, teachers and accompanying adults’ passports are current and suitable to enter the destination country.
- Know the international dialling code in the event of a serious accident or the emergency contact needs to be informed.
- Make regular contact with the Academy throughout the visit to keep contacts informed of significant events.
- Identify an emergency contact at home/back at base who holds a valid passport and could travel out to the area to support the group leader in the event of an emergency.
- Brief children and young about any local hazards and emergency procedures, including the use of telephones.
- Risk assesses all activities planned for the visit, particularly hotel swimming pools and all adventurous activities.
- Discuss any local customs and cultural issues.
- Agree codes of conduct with children and young people.
- Check visa and passport requirements including those children and young people classed as non-UK residents. Ensure all members of the party carry the address and telephone number of the hotel or hostel in case of separation.

- Follow good practice and each child or young person should carry a card with a contact telephone number of the group leader or residential base, to call if he/she becomes lost. Children and young people should be instructed to go to a local shop or approach a police official and show the card if he/she becomes separated from the group.
 - Consider language ability as part of the risk assessment.
 - Photocopies of passports and other essential documentation may prove useful. Copies should also be held by the emergency contacts in the UK.
 - Ensure all staff and volunteers, including family members understand that all RMAAT trips operate as dry trips, and no alcohol is consumed during the visit at any time.
138. Seek advice from the Foreign, Commonwealth and Development Office. Visit the Foreign, Commonwealth and Development Office website for the latest travel advice – www.gov.uk/foreign-travel-advice.
139. Approval should be sought from the Trust via Evolve at least 3 weeks in advance of the visit. Group leaders are encouraged to have a Plan B, making alternative arrangements so they are prepared should the need arise to change the itinerary due to unforeseen circumstances.
140. In normal circumstances each party should be accompanied by two adults, at least one of whom should be a member of staff.

Snow Sports

141. Snow sports (skiing and snowboarding) are regarded as adventurous activities, and the visit must therefore be approved by the Trust. It is recommended that a member of staff intending to organise a snow sport visit (but not instruct, lead, or supervise on snow) holds the Ski Course Organiser Award, and must have previously accompanied at least one educational snow sports visit.
142. 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 snow sports establishment. Visit organisers should therefore consider the merits of fully instructed lessons of 4/5 hours' duration per day.
143. Where a travel company or ski tour operator is providing an element of instruction, staffing, or guiding, the External Provider Form (if they do not hold the LOtC Quality Badge) should be completed. A member of staff intending to lead skiing or snowboarding (i.e. not using a ski school instructor) must be qualified and always operate within the remit of their qualifications and competence.
144. It is mandatory for Trust students and staff to wear a properly fitted ski helmet when undertaking skiing or snowboarding activities. Students must not engage in off-piste activities.

Overseas Expeditions

145. Overseas expeditions can bring immense educational benefits to children and young people, and the Trust Board fully supports and encourages overseas expeditions that are correctly planned, managed, and conducted. Overseas Expeditions (for the purposes of this document) are defined as those which typically take place in remote areas of the world and/or in developing countries. External providers

should complete the 'External Provider' (EV6) form if they are supplying an element of instruction, staffing or guidance.

146. Further guidance is contained within 'Guidance for Overseas Expeditions' (download via the National Library – other documents – on Evolve). This should be referred to when the proposal is initiated (normally 18-24 months before the venture). This document includes a checklist of vital aspects that must be considered prior to the establishment making a commitment with an external provider. Establishments should consider the educational aims of the visit, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met. Overseas expedition providers are required to comply with the minimum standards specified in this document.
147. The Group Leader should hold an appropriate First Aid qualification and the Trust recommends that the group leader attends the one day 'Overseas Expeditions and Fieldwork' course organised by the Royal Geographical Society and endorsed by the national Outdoor Education Advisers' Panel.

Exchange Visits

148. The success of a foreign exchange is largely dependent on good relationships, planning, and communication with staff in the host school. Group leaders should ensure:
- All group members have easy and accessible contact in the host country, preferably by telephone, with a member of their own staff.
 - Children and young people are aware of the ground rules agreed between the party leader and the host family.
 - Appropriate pairing arrangements are made.
 - Host families are aware of any medical or dietary needs.
 - There are clear arrangements for collecting and returning children and young people.
 - The school retains a list of all children and young people involved (including host children) and their family names and addresses.
 - Children and young people living with host families should have easy access by telephone to their teachers.
 - Children and young people are briefed regarding emergency arrangements and encourage contact with their staff in case of anxiety or concern.
 - Where foreign exchanges are organised by an Academy, and are of less than 28 days, or where private arrangements are made directly between parents (for any length of time), the requirement for DBS checks are lifted: the host parents (UK or abroad) would not need to be DBS checked. However, the staff that take the children and are responsible for their supervision on the trip would need to be DBS checked.
 - Host families abroad will not be subject to UK law. Group leaders should seek reassurances from the host school regarding procedures for vetting the suitability of host families. The host school or placing agency should have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange children and young people. If these are not in place the group leader should seek further assurances and/or reconsider whether the visit should take place.

Water Margin Activities

149. Water margin activities are defined as learning activities that take place near or in water – such as a walk along a riverbank or seashore, collecting from ponds and streams, or paddling/walking in gentle, shallow water. It does not apply to swimming and other activities that require water safety qualifications and

equipment, or water-going craft. Note that 'shallow' generally means up to the knees. If the planned activity exceeds the shallow definition, the visit is 'water based' and will therefore require approval from the Trust Board.

150. As with all activities the group leaders' judgement will be paramount. The activity or journey should be matched to the party in terms of aims, terrain, distance, equipment available, clothing worn, weather conditions (both current and forecast), degree of supervision and time available.
151. Water margin activities are not classed as adventurous and so do not require specific approval from the Trust Board. Water margin activities should be approved by the Academy Principal and Chief Executive and recorded on Evolve.

Water Based Activities

152. 'Water based' activities are regarded as adventurous and therefore require approval from the Trust. The responsibility for safety will therefore rest with either:
- An external provider – in which case the External Provider Form should be completed (if they do not hold the LOtC Quality Badge), or
 - A member of Trust staff – in which case the Activity Leader Form must be completed via Evolve stating the person's qualifications and experience to lead the activity.
153. 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 risk assessment and considering factors such as the activity taking place, staff competence and supervision arrangements. Reference to national guidelines may help in this process. The level of water confidence of all participants must be known by the activity leader prior to the commencement of 'water based' activities.
154. Leaders should have a knowledge of the water conditions/hazards (and potential changes) that might be encountered and prepare accordingly. Local advice must be sought where appropriate in unfamiliar locations.
155. Personal buoyancy conforming to the appropriate national governing body standard must be always worn by all participants in water-based activities (except at the discretion of the leader in swimming activities).

Beach Safety

156. The beaches and coastal areas of Yorkshire and elsewhere offer a wide range of opportunities for both study based and activity-based use. However, whilst presenting many challenges and interest, areas where the land meets the sea present their own inherent hazards. A high level of vigilance and supervision is needed when close to any stretch of water, even shallow water. The sea needs extra care and attention. Group leaders planning activities in coastal areas should consider the following points:
- Tides, swells, wind, currents, sandbanks, and cliffs can present difficulties. Exit routes must be always checked well in advance and during the visit or activity.

- The group leader should be aware of the prevailing local conditions: surf and tide, currents, wind, cold water, weeds, polluted water, and stability of the sea or riverbed may all affect safety. Gain access to local information where possible.
- Swimming is inadvisable no matter how inviting the sea may seem and should never be allowed as an impromptu activity. Group leaders who decide to allow swimming should ensure this is part of a carefully supervised activity conducted by suitably qualified leaders, with adequate lifeguard provision and experienced adults in the group who are qualified to enter the water to rescue a swimmer in difficulty. The group leader must be fully confident of undertaking a rescue of any member of the group and remain in control of the whole group, including those in and out of the water.
- Paddling in very shallow water needs to be strictly supervised, especially on coasts with sudden drops, submerged rocks, sandbanks, or large waves. Again, the group leader must be able to remain in full control of all students, including those in and out of the water.
- Risk assessments for outdoor water-based activities should take account of the possibility of children who suddenly panic in cold water.
- Beaches present their own problems, particularly when large numbers of the public are present. Establish a 'base' to which members of the group must return if separated from the rest. Look out for warning notices and flags.
- Be aware of the possible presence of dangerous debris such as glass, syringes, sewage, jelly fish, barbed wire, or marker flares.
- Digging in the sand, particularly in cliffs or dunes could cause cave-ins.
- Climbing on rocky beaches and cliffs should be discouraged. Do not work or base groups under such sites or allow young people to knock down or throw stones.
- Weed covered rocks may make surfaces very slippery.
- Children, young people, and staff on beach related visits should be made aware of the risk of sunburn and heat stroke. This should be considered as part of the risk assessment.
- On cliff tops remain on the path. The group leader should be at the front and a responsible adult at the back. Accompanying adults should act as a 'buffer zone' between students and the edge of the cliff. Cliff tops are exposed areas and may experience rapid changes in weather conditions. Clothing, route choice and group management should reflect this on very exposed paths. Be prepared to seek advice from the Coastguard, Lifeguards, the local Trust, or the Met Office. Only undertake those activities and projects which you have the necessary experience and competence to undertake.

Swimming

157. Children and young people must be always supervised by a competent adult whilst undertaking swimming activities. The following criteria apply:

- Trust approval is required for open water swimming.
- For free swimming activity - A Valid Beach Lifeguard Qualification.
- For structured or programmed activity: - A valid RLSS UK Emergency Response (Activity Supervisor) Award or a written statement of competence by an appropriate technical adviser.

In addition, the designated lifeguard must be dedicated exclusively to the group, and the location used must fall within the RLSS definition of a 'safer bathing area'. See the RLSS website for further detail – www.rlss.org.uk.

Swimming pools (lifeguarded)

158. Trust approval is not required for this activity. UK swimming pool safety is guided by various Health & Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure teaching and coaching activities are conducted safely.
159. For publicly lifeguarded pools abroad, the group leaders must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water. Unless suitably qualified, Trust staff should not have responsibility for lifeguarding. However, they do always retain a pastoral role for participants either through direct or 'remote' supervision.
160. For swimming lessons, the group leader should ensure that swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to the guidelines given in the Hotel (and other) swimming pools section below.
161. Staff leading structured swimming lessons should hold an ASA level 2 Swimming Teacher qualification or higher. The current Trust teacher to pupil ration (as recommend by the ASA) for swimming lessons is 1:20.

Hotel (and other) swimming pools

162. Trust approval is required for this activity if lifeguarding arrangements are not provided at the venue. If lifeguarding arrangements are not provided at the venue, then the group leader will bear the full responsibility for ensuring swimming safety.
163. The role of the lifeguard is to:
 - Keep a close watch over the pool and the pool users, exercising appropriate levels of control. (Note: the lifeguard should always remain on the poolside except in the case of an emergency)
 - If necessary, brief pool users in advance regarding 'rules' (e.g. no diving, running etc.).
 - Communicate effectively with pool users.
 - Anticipate problems and prevent accidents.
 - Intervene to prevent behaviour which is unsafe.
 - Carry out a rescue from the water.
 - Give immediate first aid to any casualty.
164. The above must be accomplished in the context of the normal operating procedures for the pool and the emergency plan, which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool, and staff should be aware of the procedures in the event of an emergency, and who at the venue will provide back up for the lifeguard during an emergency.
165. Staff will also need to ascertain whether they have exclusive use of the pool or whether other persons (e.g. guests) are able to swim at the same time. Other pool users may increase the supervision role of your lifeguard.

Public open water venues (beaches, lakes etc.) with an active lifeguard service:

166. The group leader will bear the full responsibility for ensuring swimming safety. Swimming may only take place in designated, marked areas, and with the lifeguard on duty.
167. The group leader must ensure that swimmers and non-swimmers are aware of any written or verbal safety advice provided by the on-duty lifeguard or local information boards etc.
168. Whilst it is not essential, the Trust strongly recommends that the activity leader hold the RLSS UK National Rescue Award for Swimming Teachers and Coaches or has undertaken the 'Beach' module of the RLSS Water Safety Management Programme.
169. The presence of a lifeguard does not reduce the duty of the group leader to manage the swimming activity safely, always including regular headcounts and attention to the location/behaviour of the group.

Farm Visits

170. Visits to private working farms, agricultural college farms, 'model' farms and rural studies centres are a regular feature of education for children and young people from both rural and urban environments. Such visits are usually highly beneficial to children in helping them to appreciate aspects of rural life. Children and young people are often invited to touch livestock, help bottle feed calves and lambs, and taste things such as animal feedstuff and raw milk.

The Risks

171. Experience shows that visits can carry a small risk for the children and young people of acquiring infection, particularly gastroenteritis. Several micro-organisms are commonly present in livestock animals and may cause gastroenteritis in humans. They may be found in faecal droppings and elsewhere in the farm environment. Farm visits may result in a risk of transmitting infection directly because the substance eaten is infected or contaminated. In addition, fingers may become contaminated with animal faeces which is then transferred to mouths when eating or simply sucking their fingers or thumbs.

Health Precautions

172. Visit organisers need to be aware that visitors may be more susceptible to infection from the farm environment and its products than those who live in that environment. Therefore, prevention depends primarily on simple hygiene measures.
173. Parents, teachers, and children should be made aware of these measures, and they should be re-emphasised before and during the visit. To this end the following advice is given:
 - Carry out a pre-visit to identify specific hazards.
 - Ask children and young people with cuts or abrasions to cover them with a suitable dressing.

- There should be a briefing for children and young people at the farm at which the points in these guidelines should be covered.
- Keep their fingers out of their mouths and do not eat their sandwiches etc. until they have washed their hands.
- Do not sample, taste, or take away and animal feed stuff, raw milk etc.
- Do not drink from farm taps.
- Children and young people should be closely supervised if direct contact with animals is likely. If this happens, they should be made to wash their hands afterwards.
- Never let children or young people place their faces against the animals.
- Consider the risks of allowing children or young people to ride on tractors or other farm machines.
- Do not let children or young people play in the farm area (grain storage tanks, slurry pits) other than designated play/rest areas.

Other Hazards

174. Modern farms can present hazards to children, young people, and adults. Group leaders need to be aware of:
- At harvest time some children and young people with asthma or hay fever may have trouble.
 - The dangers of moving machinery and mechanised tools such as chain saw etc. Some farms hold stocks of highly toxic chemicals, used in spraying etc. contact with which presents a clear hazard.
 - The possible risk of diseases being transmitted to pregnant women during lambing time.
175. Although the above guidelines have been written with farms in mind, the general principles should be followed when visiting other similar establishments (zoos, wildlife reserves, etc.).

Emergency Procedures

176. All Academies should consider the need for robust emergency arrangements as part of the visit planning and risk assessment process. All staff involved in a visit should be aware of the action to be taken in the event of an emergency.
177. It is vital that all staff understand the first aid and emergency procedures, not just the visit leader. Consideration should be given to participants that have special educational needs or medical conditions.

For all visits:

178. A completed: 'Emergency Card - Group Leader' (EV7) form must be always with the Group Leader.
179. Where the emergency contacts will not be at their workplace during the visit – A completed 'Emergency Card – Emergency Contacts' (EV8) form must be always with the Emergency Contact(s).

'Adventures' on the school/setting site

180. An increasing number of schools now utilise their own sites for a range of activities. The Trust strongly encourages this approach due to its low cost and frequent accessibility. Activities range from gardening/growing activities, forest school activities, Team Building, mobile climbing walls, geo-caching, camping/sleepovers etc.
181. The Trust does not operate an approval system for most on site activities. However, the following advice should be followed when developing 'in house' activities or by employing external providers:
- Do carry out and record a risk assessment for new activities. This should not be an onerous task and should always form a key element when developing new activities. The risk assessment should be reviewed on every occasion that the activity is repeated, and a note made of any amendments (e.g. additional hazards presented by the special needs of a particular student).
 - Do consider your choice of materials, how they are used for 'team building' and 'problem solving' type activities, and how closely the group should be controlled while using the equipment.
 - Do consider staff training for grounds-based activities, especially for those which may offer more significant risks such as fire-lighting, outdoor cooking, using hand tools for conservation work etc.
 - Ensure that any contractor has adequate third-party liability insurance, and you are clear about your contractual obligations, including any costs you may have to bear in the event of cancellation.
 - When gardening and growing, remember the need for simple hygiene, and take advice on suitable plants/animals for a school/setting environment.
 - When considering larger scale developments (e.g. school climbing walls, on-site MTB tracks, high ropes structures etc.) seek further advice with reference to their safe installation, maintenance, and staffing/supervision needs.
182. On-site activities that would require Trust approval (via Evolve) are those that would fall into the category residential (camping etc.) The normal approval process should be followed for this kind of activity.

School Climbing Walls – Record Keeping

183. Where an Academy has an on-site climbing wall where either top roping or lead climbing is undertaken then it is essential that clear records are kept of:

- Operating procedures.
- Safety equipment purchase dates and inspection dates.
- Staff qualification and training and training updates.
- Belay point inspection dates.

Other Policies

184. This policy should be considered in conjunction with Academy curriculum plans and strategies for learning, equal opportunities, special needs, and inclusion policies together with staff development requirements.

Monitoring

185. The Director of HR will monitor the implementation and effectiveness of the policy by monitoring reports made under the policy.

Diversity

186. The Trust is committed to a policy of celebrating diversity, promoting equality of opportunity, providing an inclusive workplace, and eliminating any unfair treatment or unlawful discrimination. This overriding objective applies to all policies and procedures relating to staff and students. The Trust will always comply with the requirements of the [Equality Act 2010](#) and associated guidance produced by the Department for Education.

Appendix 1: Extract from the Finance Regulations

Activities, School Trips and Lettings

Each Academy Principal is responsible for maintaining a file of all paid for activities and trips. In respect of each activity or trip:

- A lead Teacher must be appointed by the Principal to take responsibility for all aspects of the activity or trip.
- A plan must be prepared showing the intended number of students to be involved and the total cost.
- The costings, timing of proposed deposits and any refunds must be reviewed and approved by a member of the Finance Team.
- Once the same has been approved, the lead Teacher may pass the documentation to the Academy Principal for approval.
- Only when the proposal has been approved by the Finance Team and the Academy Principal can a letter be sent to parents.
- The Academy Principal should send confirmation of their approval to the Finance Team so the trip or Activity can be set up on the Finance system and cashless payment system.
- Those paying for the trip or activity should make payment of the same by cashless payment.
- The Finance Team will maintain a record of each student showing the amount paid and the amount outstanding. This will be sent to the lead Teacher on a regular basis. It is the lead Teacher's responsibility to chase for outstanding payments.
- On conclusion of the Trip or other activity, the Finance Team will identify any over or under spend and any material underspends will be refunded to the Payees.

Appendix 2: Equality Impact Assessment

Equality, Diversity, Cohesion, and Integration Screening.

As a public authority, the Rodillian Multi Academy Trust needs to ensure that all our strategies, policies, service, and functions, both current and proposed have had proper consideration of equality, diversity, cohesion, and integration.

A **screening** process can help judge relevance and provides a record of both the **process** and **decision**. Screening should be a short, sharp exercise that determines relevance for all new and revised strategies, policies, services, and functions. Completed at the earliest opportunity it will help to determine:

- the relevance of proposals and decisions to equality, diversity, cohesion, and integration.
- whether or not equality, diversity, cohesion, and integration is being/has already been considered, and
- whether or not it is necessary to carry out an impact assessment.

Organisation: The Rodillian Multi- Academy Trust	Department responsible for the Policy: Head of Governance and Compliance
Lead Person: Head of Governance and Compliance	Contact Number:

1. Title: Learning Outside the Classroom & Offsite Visits Policy & Guidance

2. Please provide a brief description of what you are screening
The Policy

3. Relevance to equality, diversity, cohesion, and integration		
Questions	Yes	No
Is there an existing or likely differential impact for the different equality characteristics?		x
Have there been or likely to be any public concerns about the Policy or proposal?		x
Could the proposal affect how services are organised, provided, located and by whom?		x
Could the proposal affect our workforce or employment practices?	x	
Does the proposal involve, or will it have an impact on: -?		
<ul style="list-style-type: none"> • Eliminating unlawful discrimination, victimisation, and harassment • Advancing equality of opportunity • Fostering good relations 	x	X X

4. Considering the impact on equality, diversity, cohesion, and integration
<ul style="list-style-type: none"> • Scope of the proposal: Students and staff. • Who is likely to be affected? Students and staff. • Consultation and engagement activities with those likely to be affected. The Policy is available through the Trust and Academies websites and a written copy can be provided on request.
<ul style="list-style-type: none"> • Key findings <p>We have considered the potential positive and negative impact on different equality characteristics in relation to the Policy and do not believe that any groups will be adversely affected. The Trust is vigilant in adhering to the appropriate legislation in relation to protected characteristics and to preventing discrimination. Managers are supported and trained in relation to these areas. The Policy has considered religious, racial and gender-specific clothing requirements and those of staff with disabilities in line with the Equality Act.</p> <p>We have considered the perception that the proposal could benefit one group at the expense of another and we do not believe that the Policy could be perceived to be discriminatory with regards to its wording or format.</p>
<ul style="list-style-type: none"> • Actions <p>The Trust will continue to promote positive impact and remove/reduce negative impact through the application of this Policy within the organisation.</p>

5. Governance, ownership, and approval		
Please state here who has approved the actions and outcomes of the screening		
Name	Job title	Date
Adam Marham	Head of Governance and Compliance	19.02.24

6. Publishing	
This screening document will act as evidence that due regard to equality and diversity has been given.	
Date screening completed	19.02.24
Date agreed at Trust Board	