



## **Outdoor Education, Visits and Off-Site Activities Health and Safety Policy**

Devon County Council and Torbay Council establishments

September 2018



## **Key Changes from the September 2016 Outdoor Education, Visits and Off-Site Activities Document**

1. There has been a significant change in the status of the visit leader. It is no longer DCC policy that the visit leader must be a teacher or youth worker. The visit leader must be a member of staff and the headteacher must be confident that the visit leader is competent to run that visit, (see p. 4 for further details).
2. As the Visit Leader need no longer be a teacher or youth worker, DCC policy has changed regarding remote supervision. It is now unacceptable that the Visit Leader should stay at school whilst another member of staff goes out with the pupils.
3. There is greater clarification on pupil staff ratios and the need for the school to use risk assessment to justify those ratios (p. 27)
4. The Standard Operating Procedures (SOP) have been reviewed and have been re-formatted so that each type of visit has a separate SOP for adaptation.
5. Updated section on GDPR (p. 10).
6. The 'Activity Specific Guidance' section has had the leader qualifications and national governing bodies updated.
7. Additions to the appendix of an 'Emergency Action' and 'Emergency Action Cards' sections (p. 103 and p. 105).
8. Removal of the 'off-site activities proposal' and 'summary of information about young people and adults, etc' forms.
9. Revised advice on parental consent (p. 24)
10. Revised advice on use of minibuses (p. 32)
11. Additional information added to the Snowsports section.
12. All web addresses have been updated.

Please note that the first point of contact for support through Evolve and for health and safety in outdoor education is:

Devon Health & Safety Service, Devon County Council, Great Moor House,  
Bittern Road, Sowton Industrial Estate, Exeter, EX2 7NL

Tel.:01392 382027

Email: [healthandsafety@devon.gov.uk](mailto:healthandsafety@devon.gov.uk)

**Through an agreement between Babcock LDP and the DCC Health & Safety Service, Babcock will continue to provide specialist outdoor education advice and support to DCC, maintained schools and subscribing academies through Evolve, EVC training and the Babcock website.**

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# SECTION ONE

## 1. INTRODUCTION

- 1.1 This document applies to those establishments who are DCC or Torbay employers (such as maintained schools) and non-DCC or Torbay establishments (such as academies) who formally adopt this policy. **Each establishment must have their own local off-site activity policy and standard operating procedures (see p.14) to comply with this policy.** The generic off-site policy and standard operating procedures are available in the document library of the OSHENS website, *Inside Devon* or on *Evolve*.
- 1.2 The activities that are covered in this policy are all aspects of outdoor learning, visits and residential experiences which take place away from the school or normal working environment.
- 1.3 Outdoor education helps young people to:
- acquire skills which promote well-being and healthy lifestyles into adulthood
  - develop knowledge and understanding about risks to promote their own and others' safety
  - enjoy and achieve as a result of opportunities to develop as successful and confident learners
  - gain a heightened awareness of the local and global environment and our role within it
  - gain and apply key skills including leadership, team working and decision making, so that they are better able to achieve economic wellbeing
- 1.4 Outdoor education, visits and off-site activities should be available to all who wish to participate, irrespective of gender, religion, ethnic origin, social background, medical need or physical ability.
- 1.5 This policy does not cover work experience for which separate arrangements apply. Please note that school journey insurance cover for off-site activities does not apply to work experience.

## 2. THE LAW

- 2.1 The principal piece of legislation is the *Health and Safety at Work, etc Act 1974* ('the Act') and the regulations made under the Act such as *The Management of Health and Safety at Work Regulations 1999*. The Act requires employers to do all that is reasonably practicable to ensure the health, safety and wellbeing at work of employees and non-employees, including young people, who are affected by their work. This includes off-site activities. *The Management of Health and Safety at Work Regulations 1999* requires written risk assessments where there is a significant risk.

- 2.2 Any staff member who takes responsibility for a child has an 'in loco parentis' responsibility towards that child. That person may do what is reasonable to safeguard or promote the child's welfare – they should act in the best interest of the child (or children) in their care.
- 2.3 Organisations and individuals who assume a responsibility for the supervision of young people take on a legal duty of care and this cannot be delegated.
- 2.4 There is a 'higher duty of care' on teachers and other professional staff because of the role they carry out and the greater knowledge they are assumed to have of young people and specialised activities. The level of judgement expected of staff is related to that individual's knowledge, experience and training.
- 2.5 Planning for visits and activities must also take account of the *Special Educational Needs (SEN) and Disability Act 2014*, *The Equality Act 2010* and *Supporting Pupils with a Medical Condition*. Schools should seek to anticipate the needs of pupils who are disabled as well as the needs of specific pupils. Specifically, schools must not:
- treat a disabled pupil less favourably than another for a reason related to their disability and without justification
  - fail, without justification, to take reasonable steps to avoid placing disabled pupils at a substantial disadvantage in comparison with their non-disabled peers
- 2.6 In essence, disability legislation requires schools to:
- plan ahead to meet the needs of all disabled pupils
  - identify potential barriers to inclusion
  - work collaboratively with disabled pupils, their parents and others
  - identify practical solutions through a problem-solving approach
  - ensure that staff have the necessary skills to respond effectively
  - monitor the effects of adjustments on a pupil's progress.

### **3. ROLES AND RESPONSIBILITIES**

- 3.1 This is a combined policy document so unless there is reference to one specific council in the text or the meaning needs additional emphasis, the term 'Council' relates to both Devon County Council and Torbay Council. When this policy refers to 'headteacher' this applies to senior management in non-school establishments.

#### **Local Authority**

- 3.2 This term applies to both Devon County Council and Torbay Council, unless there is specific reference to one local authority. The local authority will:

- make this policy document available to all establishments within the LA
- monitor and endorse proposals for specified types of visit
- provide training related to managing off-site activities
- provide access to information and advice
- establish points of contact in the event of an emergency
- maintain specified insurance cover for maintained schools
- monitor and review safety for off-site activities

### **The Governing Body**

- 3.3 The governing body should agree a policy for managing off-site activities. This is done by endorsing the use of this policy, creating your own establishment's supplementary policy and standard operating procedures for routine and regular visits. There is a generic off-site policy and standard operating procedure available on the OSHENS and Evolve websites.
- 3.4 The headteacher, on behalf of the governing body, will authorise all off-site visits and activities and provide a regular report to the governing body summarising the range of proposed visits and those which have already taken place.

### **The Headteacher**

- 3.5 The headteacher should ensure that the planning and management of off-site activities complies with this document and their school policies, before endorsing a visit.
- 3.6 The headteacher may delegate this function to a senior member of staff who has appropriate authority to make decisions regarding pupil safety in the headteacher's absence.
- 3.7 However, responsibility rests with the headteacher and with the governing body. The headteacher should give particular attention to ensuring that:
- The proposed visit has clear educational benefits and outcomes
  - Local Authority and establishment policy and procedures are followed
  - The visit leader and additional staff are competent to manage the visit for the specific group they are responsible for
  - Suitable child protection measures are in place
  - Risks have been assessed, recorded and safety measures put in place

### **The Educational Visit Co-ordinator (EVC)**

- 3.8 The role of the EVC is to ensure establishment visits are carried out in line with this policy and school policies. Overall responsibility rests with the headteacher.
- 3.9 The EVC should be specifically competent and trained for the task; they should have practical experience in leading and managing a range of visits similar to

those typically run by the establishment. Where this is not the case, the headteacher must reasonably limit the extent to which the function of the EVC is delegated.

3.10 The EVC will be the principal contact with the local authority over planned visits.

3.11 The EVC should work with visit leaders to ensure:

- educational visits follow policies and procedures
- the management of visits and off-site activities is informed by an appropriate risk assessment process
- approval arrangements are satisfactory and based on safe practice and clear educational objectives
- staff have access to advice and information
- leaders and staff meet identified standards and are competent to lead and support particular visits and activities
- relevant training, induction and other Continuous Professional Development opportunities are provided
- procedures are in place to inform parents and for them to give consent
- emergency arrangements are in place for visits and off-site activities
- there is a system to keep and review records of visits, accident and incident reports
- systems are monitored and reviewed. This may include accompanying visits on a sampling basis
- external providers / contractors / coaches have a clear contract, and robust checks have been made

### **The Visit Leader**

3.12 The visit leader must be an employee of the establishment and present on the school visit. There are exceptional circumstance where this may not be the case see p. 31 for further advice.

3.13 The visit leader has overall responsibility for the supervision and conduct of the visit. By authorising a visit, the headteacher confirms the visit leader's competence to lead a well-planned, high quality educational visit in a safe manner.

3.14 The visit leader must:

- Get approval from the headteacher before any off-site visit or activity takes place
- Follow their school's policy and standard operating procedures
- Assess the risks involved and amend the Standard Operating Procedure through the enhanced risk assessment
- Brief staff, volunteers and pupils on the risks and control measures
- Inform parents about the visit and gain their consent where necessary

- Re-assess risks while the visit takes place and act on that assessment
- Provide relevant information to other staff, volunteers or providers about their roles and duties, the nature of the visit, location, and participants
- Ensure that all staff and any external provider have access to emergency contact and emergency procedure details
- Agree a clear working relationship with any external providers, including clear hand-over of supervision

### ***Competence of the Visit Leader***

3.15 The single most important factor in ensuring the safety of participants involved in a visit is the competence of the visit leader. When assessing the competence of a member of staff to lead a visit, the headteacher should consider these questions:

- What is the reason for the visit?
- Is the leader an employee?
- Does the leader have sufficient understanding of their responsibilities?
- Does the leader understand the purpose of the Standard Operating Procedures and how to amend as required?
- Does the leader have the necessary organising ability?
- Is the leader competent in risk assessment and risk management?
- Does the leader have suitable prior knowledge of the young people they will be responsible for?
- Does the leader have sufficient experience of leading similar visits?
- Does the leader have appropriate qualifications, is suitably up to date and fit to lead the programme?
- Where an external provider is used, has the visit leader agreed a clear contract, including the supervision of the young people?
- Does the visit leader have the experience needed to manage and maintain discipline of groups of children?

### **Other Members of Staff**

3.16 The Visit Leader may require other staff, such as Teaching Assistants or Higher Level Teaching Assistants, to assist in the visit. The Visit Leader should ensure that they are:

- clear about their roles and responsibilities and carry out that role in an appropriate manner
- clear about emergency contacts and details
- clear about the hand-over arrangements with any external providers

3.17 The involvement of support staff can help to meet recommended staffing ratios, provided the responsibilities placed on support staff are appropriate and those support staff have the competence or qualifications needed.

## **Volunteers and Parent Helpers**

- 3.18 Visit Leaders occasionally have volunteers or parent helpers accompanying them on visits. It is important that, like other members of staff, they are clear about their roles and responsibilities. If parent helpers also have their child attending the visit, it is particularly important the Visit Leader has made clear what the parent's responsibilities are in the event of an emergency.

## **Young people**

- 3.19 While taking part in off-site activities young people also have responsibilities which they should be made aware of for their educational development, their own health and safety and that of the group. Young people should be involved, at an appropriate level, in the planning and managing of visits and activities including risk assessment. Young people should:
- not take unnecessary risks
  - follow instructions of the visit leader and other members of staff
  - behave sensibly, keeping to any agreed code of conduct
  - inform a member of staff of significant hazards

## **Adviser for Outdoor Education**

- 3.20 In addition to the DCC Health & Safety Team Advisers, specific technical advice is provided to the LA, schools and establishments from the Adviser for Outdoor Education, employed by Babcock LDP.
- 3.21 The Adviser for Outdoor Education is a member of the Outdoor Education Advisers Panel and provides advice to the Local Authority and maintained schools through a Service Delivery Agreement and to subscribing academies and independent schools through a Service Level Agreement with Babcock LDP.
- 3.22 The Adviser for Outdoor Education provides endorsement of Category B and C visits on behalf of the Local Authority via Evolve. All schools, teams and establishments must ensure that they have access to the Adviser for Outdoor Education in order to be able to fully comply with this policy.

## **External Providers**

- 3.23 External providers are third parties contracted to provide instruction or coaching for 'adventurous' activities, residential accommodation, travel packages, or overseas expeditions and who are not employed members of school staff. The school retains the Duty of Care at all times. Employees of external providers are usually responsible for technical instruction but overall supervision is the school's responsibility.

- 3.24 All external providers must have a clear contract with the school and be subject to robust checks. At a minimum, every provider must complete the form SOE5, unless they already hold the Learning Outside the Classroom Quality Badge. See section 3 for more details.
- 3.25 Visit Leaders **do not** need to see the detailed risk assessment produced by an external provider if they are confident about the overall management of that provider. Indeed, it would be reasonable to presume that they would not have the expertise to judge risk assessments if they are of a technical nature.
- 3.26 Schools using external providers must check that all licences, including any Adventure Activity Licencing Authority licence (AALA) and insurance policies are up to date at the time of the visit.
- 3.27 Validity of AALA licences can be checked here:  
[www.aals.org.uk/aals/provider\\_search.php](http://www.aals.org.uk/aals/provider_search.php)
- 3.28 Where an external provider takes pupils off site without a member of school staff present, specific additional checks are required. An example of this would be if a secondary school running the Duke of Edinburgh award without staff qualified or available to lead, contracting in the provision from an external provider. Checks would include:
- The rationale for the arrangement, including the choice of external provider. It should be clear why this programme and the arrangements are in the best interests of the pupils
  - A clear contract setting out the responsibilities for supervision delegated to the external provider
  - A named visit leader, employed by the school, who retains overall responsibility for the programme and the pupils on the visit
  - Agreement for pastoral care of the pupils
  - Clear arrangements for action to be taken in the event of any incident, accident and emergency
  - Clear and specific consent from parents
  - Evidence of the monitoring of the programme, which must include visits to off-site provision

### **Venues**

- 3.29 For clarification, venues such as; theme parks, water parks, fun fairs, museums, theatres, zoos, shops, skate parks etc. are NOT classed as providers and are not required to complete a provider questionnaire (form SOE5). They may have chosen to gain the Learning Outside the Classroom Quality Badge but this is not requirement of the Local Authority for such venues.
- 3.30 All venues open to the public or providing services to customers are bound by the Health & Safety at Work, etc Act (1974) to provide a safe working

environment for the public, visitors and customers. Schools are not required to ask such venues for risk assessments.

- 3.31 If the visit leader has concerns about a specific group members' use of the venue (i.e. reduced mobility, visual impairment etc.) then they should where possible visit the venue and make their own judgement about the group member's needs, and record any significant findings within their risk management plan (the Standard Operating Procedures, enhanced risk assessment).

#### **4. THE ADVENTURE ACTIVITIES LICENSING AUTHORITY (AALA)**

- 4.1 AALA is the body which oversees adventurous activities in the UK. Run by the Health and Safety Executive, AALA contracts out the licensing of venues to the Adventure Activities Licensing Service. Adventure activities licensing ensures that activity providers follow good safety management practices.
- 4.2 *The Activity Centres (Young Persons Safety) 1995 Act* made it a legal requirement for all providers of adventure activities to obtain a licence if these were intended for persons under 18 years old when parents are not present and payment is made.
- 4.3 Under the subsequent *Adventurous Activities Licensing Regulations 2004* a list of adventurous activities for which providers and venues must be licensed in order to be able to deliver them, is contained on page 98.

"The aim of adventure activities licensing is to provide assurances to the public about the safety of those activity providers who have been granted a licence. In this way it is expected that young people will be able to continue to enjoy exciting and stimulating activities outdoors without being exposed to avoidable risks of death or disabling injury.

A licence indicates that the provider has been inspected by the Adventure Activities Licensing Service on behalf of the Adventure Activities Licensing Authority, with particular attention being paid to their safety management systems with young people, and has been able to demonstrate compliance with nationally accepted standards of good practice in the delivery of adventure activities to young people, with due regard to the benefits and risks of the activity.

David Snowball  
Chair of the Adventure Activities Licensing Authority"

#### **Adventurous activities provided by your school**

- 4.4 A school or other educational establishment such as colleges etc. do not require a licence for provision of AALA licensable activities **to its own pupils or**

**students** (e.g. those on roll). However, the exemption does not apply where a school provides activities to the pupils of another school if payment is involved. For example, if school A (or its pupils) were to pay school B for the provision of licensable activities, then school B would require a licence.

- 4.5 Where there is genuine joint provision and no payment is involved then this would not be a licensable situation. However, irrespective of whether a licence is needed, arrangements should be made to develop a common policy with regards to safety management, including what should be done in the event of an emergency. Each party should know what action they are expected to take and follow the required safety measures, eg: first aid.
- 4.6 Schools are strongly advised to review their activities and if the activity falls under a licensable requirement and you provide these to other young people not on your school roll and ask for a contribution for any element of taking part, then you must apply for a licence or get the activity delivered by a licenced provider.
- 4.7 In terms of the definition of chargeable activity – the HSE has issued the following information HSE’s guidance document “Guidance from the Licensing Authority on the Adventure Activities Licensing Regulations 2004” (L77) [www.hse.gov.uk/pubns/books/l77.htm](http://www.hse.gov.uk/pubns/books/l77.htm)

## **5. SAFEGUARDING CHILDREN**

- 5.1 All Devon and Torbay council employees and other adults whose work involves regular or unsupervised access to young people under the age of 18 are screened in conjunction with the Disclosure and Barring Service (DBS). This is based on the enhanced disclosure.
- 5.2 It is also a requirement that volunteers, including those working on specific projects or providing services for the school, should be checked if they have regular or unsupervised contact with young people. Under no circumstances should staff or volunteers, in respect of whom no checks have been obtained, be left unsupervised or engage in regulated activity with pupils.
- 5.3 Headteachers of establishments who give approval for off-site activities will need to consider whether any accompanying adults, including volunteers and parents, have unsupervised access to pupils and whether they need to apply for a DBS check in line with statutory requirements. See [www.devonsafeguarding.org](http://www.devonsafeguarding.org)
- 5.4 Off-site activities and visits are subject to the same level of Safeguarding as in school. Where off-site activities are provided by the school, the schools own child protection policy and procedures apply.
- 5.5 Where possible separate staff and pupils’ toilet facilities should be available. When this is not possible the visit leader must ensure staff and pupils use of the toilet facilities are closely managed to avoid staff putting themselves at risk.

Where changing or showering facilities are used the same principles must apply. Such provision should be recorded in the enhanced risk assessment of the Standard Operating Procedures form.

- 5.6 For different categories of visit/activity different levels of provision may be available/possible. i.e. use of public toilets in public spaces or use of facilities at outdoor education centres or Forest School sites etc.
- 5.7 When using external providers for services or activities the visit leader must check that they have appropriate procedures in place, including safer recruitment procedures. This is included within the form SOE5.
- 5.8 Form SOE5 - Provider Questionnaire, must be used for all visits involving providers unless they hold the Learning Outside the Classroom Quality Badge.
- 5.9 External providers are not required by law to undertake DBS checks on their staff, as they are not a “specified establishment”. Schools using external providers should ensure that where their chosen provider does NOT DBS check staff, school staff accompany the pupils at all times.
- 5.10 Devon and Torbay Councils require that every driver and recommends every adult engaged in providing transport on behalf of the council has an enhanced DBS check. This recommendation includes parents or volunteers even if they are not left alone on the vehicle with young people.
- 5.11 Obtain more information from:

**Devon:**

Safer Recruitment Service, Great Moor House, Bittern Road, EX2 7NL; phone: 01392 383266. Email: [disclose@devon.gov.uk](mailto:disclose@devon.gov.uk); [www.devonsafeguarding.org](http://www.devonsafeguarding.org)

**Torbay:**

Child Protection Unit  
[tscb@torbay.gov.uk](mailto:tscb@torbay.gov.uk); phone: 01803 207176

## 6. GENERAL DATA PROTECTION REGULATIONS (GDPR)

- 6.1 Notwithstanding General Data Protection Regulations, employers have a responsibility to ensure visit leaders and accompanying adults know what they need to know about young people under their supervision. This may include (this list is not exhaustive):
  - Medical details of young people and accompanying adults
  - Dietary requirements of young people and accompanying adults
  - Parental contacts
  - Passport details

- 6.2 This information may be stored and shared through Evolve or other school approved systems or in paper form.
- 6.3 Establishments should ensure an appropriate statement regarding GDPR appears on parental consent forms.
- 6.4 Some off-site visits do not require consent from parents/guardians or pupils, however there are some occasions when they must obtain it. For example, if they photograph a school event and publish these images; take pupils on school visits; collect and use biometric information or send direct marketing material to parents/guardians and pupils. Under the new GDPR rules, schools will need to demonstrate that consent has been obtained freely, it is specific and not general, the person giving it is fully informed and the consent wording is unambiguous.
- 6.5 Schools will be required to keep clear records of all consent they obtain and they must inform individuals of their 'right to withdraw consent' at the time, and offer easy ways to do this. When obtaining consent directly from pupils, schools will be required to adapt the wording according to the pupils' level of understanding.
- 6.6 There are new requirements to publish certain types of information in your Privacy Notices, such as the contact details of your Data Protection Officer; the purpose and lawful basis for processing the information you are collecting; how long you intend to keep the data for; who you will share the data with and so on. In addition, individuals are entitled to have their personal data deleted in cases where the data is no longer needed or the individual withdraws consent. This right does not require a school to delete data, upon request, if the school is complying with a legal obligation in holding it, for example if the school is required under statute to collect and retain the data for a certain length of time. In line with GDPR schools should not retain personal data for longer than necessary, in relation to the purpose for which such data is processed.
- 6.7 Under Civil Law in England and Wales there is a Limitation to Claims in relation to personal injury of 3 years. However, in personal injury cases involving a child, the limitation period does not start to run until the child reaches the age of 18, therefore schools have a valid reason to hold a child's personal data such as medical or dietary needs which may be required by the school to defend a claim until the child's 21<sup>st</sup> birthday.
- 6.8 Visits on Evolve are archived automatically and the records kept. Therefore, where an incident has taken place, we recommend attaching the additional information, including parental consent forms, to the Evolve visit form.
- 6.9 The establishment will need to retain all the visit information where the visit is not notified on Evolve. This will apply where an establishment chooses not to use Evolve for Category A visits.

6.10 A statement regarding GDPR compliance on Evolve is available on each web page on Evolve.

## **7. INSURANCE**

7.1 Visit leaders must satisfy themselves that adequate insurance exists for people and property well before an educational visit or off-site activity takes place. The following outline of each council's insurances and other insurances which may be assumed to exist may help leaders to decide what cover, if any, is desirable.

7.2 Academies are not insured by the Local Authority, therefore, their staff and pupils, are not insured by Devon or Torbay Council. Headteachers and other school staff concerned with the approval of visits and off-site activities will need to check whether adequate insurance is in place for the proposed visit.

7.3 In addition the visit leader should consider what insurance is provided by other organisations they are involved with such as a travel firm, landowner or residential centre. Evidence of adequate Public Liability Insurance (for a sum insured of not less than £5m) should be requested from any third-party provider such as a residential or activity centre/provider. This is normally done by using the Provider Questionnaire, (see Form SOE5 in the appendix).

7.4 For more information about the cover currently provided, please refer to the links below. You can get a claims form from and submit claims to:

**Devon:** The Insurance Section, County Solicitors Directorate, room G16, County Hall, Exeter EX2 4QD. Phone: 01392 382292

**Torbay:** The Insurance Manager, Licensing Litigation and Insurance team, Torbay Council, Castle Circus, Torquay, TQ1 3DR. Phone: 01803 207174

## **8. WAIVERS AND INFORMED CONSENT**

8.1 In recent years some providers have asked group members (or their parents or guardians) to sign a document before taking part in certain activities (most commonly when dealing with trampoline parks, paintball activities, pony trekking, and Go-cart activity providers).

8.2 Such documents are often referred to as a 'Waiver', 'Disclaimer' or 'Consent Form'. There is often misunderstanding of the legal position from both the provider and the Visit Leader as to what legal status such documents have.

8.3 It is reasonable and indeed preferable for a provider to highlight any particular hazards or risks that an activity may represent and clearly explain these to participants (or their parents or guardians). This is acceptable as it does not set out to limit the provider's responsibility, nor ask the participants to 'waive' their rights. This is considered informed consent.

- 8.4 Conversely a 'Waiver' or 'Disclaimer', is where a provider is effectively trying to avoid any responsibility for accidents or claims in any circumstances. Such documents should not be signed. In effect these documents have no legal status as the provider cannot absolve itself or its legal responsibilities in law. However, by asking participants to sign a waiver it demonstrates that the provider is not prepared to take full responsibility for their staff or service and therefore such providers should be avoided.
- 8.5 Where schools organise out of school activities the Visit Leader must not sign any such documents on behalf of a participant or their parent or guardian.
- 8.6 Visit Leaders must not use companies who have no insurance. Please use the form SOE5 and check that the company/individual providing the activity is adequately insured (£5m public liability insurance is the minimum acceptable).

## **9. CHARGES FOR VISITS**

- 9.1 See [www.gov.uk/government/publications/charging-for-school-activities](http://www.gov.uk/government/publications/charging-for-school-activities)
- 9.2 Sections 449-462 of the *Education Act 1996* sets out the law on charging for school activities in schools maintained by local authorities in England. Academies (including free schools, studio schools and university technical colleges) are required through their funding agreements to comply with the law on charging for school activities.

## SECTION TWO

### 10. RISK ASSESSMENT AND STANDARD OPERATING PROCEDURES

*“Well-managed school visits and outdoor activities are great for children. Children won’t learn about risk if they’re wrapped in cotton wool.”*

*HSE School trips and outdoor learning activities, Tackling the Health and Safety Myths (2011)*

- 10.1 Risk assessment is a legal requirement. Every educational visit or series of visits, (e.g. fixtures or a series of swimming lessons), must be subjected to a risk assessment process irrespective of visit category, duration or frequency.
- 10.2 The DCC and Torbay Local Authorities, along with the HSE, fully recognise that learning outside the classroom helps to bring the curriculum to life – it provides deeper subject learning and increases self-confidence. It also helps pupils develop their risk awareness and prepares them for their future working lives.
- 10.3 Striking the right balance between protecting pupils from risk and allowing them to learn from school visits has been a challenge for many schools, but getting this balance right is essential for realising all these benefits in practice.
- 10.4 Striking the right balance means that:
- schools and staff focus on real risks when planning visits
  - those running visits understand their roles, are supported, and are competent to lead or take part in them
  - the real risks are managed during the visit
  - learning opportunities are experienced to the full
- 10.5 The risk assessment of off-site visits is simply:
- identification of what could go wrong or cause harm during the visit
  - making a judgement to see whether the planned precautions reduce the risk of significant harm to an acceptable level
  - deciding what else needs to be done if the risk has to be reduced further
  - making a balance judgement between risk and benefit
- 10.6 By authorising a visit, the headteacher is confirming that the risk assessment measures are appropriate and sufficient and therefore the headteacher should ensure that any SOP/risk assessment documents are accurate and completed correctly.

#### **Standard Operating Procedures (SOPs)**

- 10.7 The SOPs form part of the risk assessment process - they describe the school's control measures for managing visits that are routine and regular. There are

SOP templates for different types of visit available for schools to adapt; these can be found in the document library of the OSHENS website, in *Inside Devon* and on Evolve. The SOPs are used for all trips with additional control measures added to the enhanced risk assessment column by the Visit Leader when required.

10.8 Please read the Guidance for Planning an Off-Site Visit to assist with completion of the SOPs (which can be found on Evolve or the document library of the OSHENS website)

- Day visits, walking from school
- Day visits using transport
- UK residential visits
- Overseas residential visits

10.9 The headteacher should ensure that the information contained in the Standard Operating Procedures Column accurately reflects the practice in that establishment. Headteachers are advised to gather a group of experienced staff to discuss and agree the establishments own specific SOPs; this is often done at the start of the school year.

10.10 Once adapted the SOP should be signed by the headteacher and designated safeguarding lead. It is not necessary for the headteacher and designated safeguarding lead to sign each SOP for every visit. The Evolve approval process (if used) is sufficient to demonstrate the headteacher's authorisation of each visit.

10.11 The Visit Leader should take their establishment's most appropriate SOP for the visit that they are organising, add their name, the name and date of the visit.

### **Enhanced Risk Assessment (right hand column of the SOP)**

10.12 The Visit Leader must use the Enhanced Risk Assessment column to record additional comments or actions over and above what is already included in the SOP column, i.e. identifying pupils with additional needs, specifying details about group ratios, sub-groups, times of indirect supervision, detailing differences in accommodation such as staying in tents or yurts rather than a building etc.

### **Adventurous Activities Risk Assessment**

10.13 If the visit is an 'adventurous activity' led by a member or members of establishment staff, the Visit Leader, in addition to the SOP, will need to write an Adventurous Activity Risk Assessment which should focus solely on the particular hazards of that adventurous activity.

10.14 For example, for a Ten Tors training event, the Visit Leader would complete a SOP for the whole event including, travel, pupils' medical needs, etc. and complete a separate Adventurous Activity Risk Assessment focussing on the

specific hazards i.e. getting lost, crossing rivers, staff check points etc. It need not repeat anything already in the SOP.

- 10.15 An Adventurous Activity Risk Assessment form template is available on the OSHENS website, in *Inside Devon* and on Evolve. For Devon establishments see the HS/HSA47 Risk Assessment Arrangements document for further advice on completing risk assessments.
- 10.16 Generic templates for adventurous activities run by a school are not provided by the Local Authority. If the Visit Leader is 'competent' to lead the activity then they should be able to carry out and record a risk assessment for it. If they cannot carry out the risk assessment then they cannot be considered competent to lead the activity. See Section 3 for advice and guidance for specific visits and activities.

### **Dynamic Risk Assessment**

- 10.17 Whatever the visit category, the risk assessment process should continue during the visit. This ongoing process of risk assessment is sometimes referred to as a 'dynamic risk assessment'. This involves professional judgements by all those involved in the visit in response to changing circumstances during the visit. The ongoing risk assessment involves staff monitoring the control measures and adapting or confirming them as required. These ongoing decisions will determine the safety of the group and the success of the activity. It is not expected that leaders write down this ongoing risk assessment. However, after the visit the Visit Leader should record significant findings as a note on the visit form, in order to inform future visits.

### **External Providers' Risk Assessments**

- 10.18 Visit Leaders do **not** need to see the detailed risk assessment produced by an external provider if they are confident about the overall management of that provider. Indeed, it would be reasonable to presume that they would not have the expertise to judge risk assessments if they are of a technical nature.
- 10.19 Holding the Learning Outside the Classroom (LoTC) Quality Badge, an AALA licence or the completion of form SOE5 helps to confirm that management standards are appropriate. See Section Three. One significant exception to this is overseas expeditions, where it is recommended the Visit Leader looks through the detailed risk assessment produced by the provider. The provider's risk assessment should detail access to medical care, in-country transport and accommodation etc. all of which will inform the Visit Leader in completing their own risk assessment.

## Venue Risk Assessments

10.20 Likewise Visit Leaders do **not** need to request risk assessments for residential buildings or venues, i.e. museums, zoos etc. Each venue must comply with the Health & Safety at Work Act (1974) in providing a safe environment for staff, visitors and customers. If the Visit Leader has specific concerns about their use of a venue, i.e. a child with reduced mobility or visual impairment, then they should visit the venue and carry out their own risk assessment with the child's needs in mind. If a pre-visit is not possible then a conversation should be had with the venue operator in order to address any concerns.

## 11 ADVENTUROUS ACTIVITIES LED BY EXTERNAL PROVIDERS

### Provider Questionnaire (form SOE5)

- 11.1 Where adventurous activities (outlined on page 98) are provided by an external provider, form SOE5 must be used to confirm the provider meets the required standards. Form SOE5 is not required where a provider holds a Learning outside The Classroom Quality Badge
- 11.2 There is no need to ask for additional risk assessments from a provider who completes the form SOE5 form, or who holds the Learning Outside The Classroom Badge, (except for Category C expeditions, see page 22)
- 11.3 **Please note, the LA does not endorse or approve any providers.**
- 11.4 The completed form SOE5 must be read by the visit leader and headteacher and they must satisfy themselves that the answers provided meet their expectations.
- 11.5 It is reasonable that a sole trader should reply 'n/a' to the question regarding their safer recruitment policy, likewise not all of the providers' staff may have DBS checks. It is up to the visit leader and or headteacher to decide whether to engage the provider. Additional advice can be sought from the Adviser for Outdoor Education.
- 11.6 Form SOE5 should be sent to the provider when making a provisional booking and no deposits should be committed prior to its satisfactory completion and return. The satisfactory completion of the form does not necessarily signify that the service on offer will be appropriate for the young people from your establishment. A pre-visit to the centre and references from previous users or both will help you to decide if the centre will provide the right service, taking into account the age, abilities and needs of your particular group.
- 11.7 In particular, the form SOE5 does not check the quality of the provision, nor the financial stability of the company.
- 11.8 Form SOE5's have a calendar year lifespan, when selecting an existing provider on Evolve, the visit leader should ensure they have read the form SOE5 and that

it is in date. The school is recommended to contact the Devon Health & Safety Service in the first instance, if the visit leader has doubts following a centre's failure to answer the questions satisfactorily.

- 11.9 Whilst the visit leader may rely on a provider or their employee for technical instruction and safety of an adventurous activity, the visit leader remains in charge at all times. The visit leader cannot delegate their duty of care to a third party.

## 12 **OUTDOOR AND ADVENTUROUS ACTIVITIES LED BY SCHOOL STAFF**

- 12.1 This section relates to where establishment staff and other leaders or volunteers operating alongside establishment staff are leading an adventurous activity themselves.
- 12.2 Outdoor and adventurous activities may not necessarily require specific qualifications but will need establishment staff to exercise professional judgement. Almost all category B activities will require a qualified leader. Staff should also know general requirements regarding what young people should be taught to ensure safe practice. This includes how to lift, carry, place and use equipment safely and how to warm up and recover from exercise.
- 12.3 Activity guidance is provided by individual National Governing Bodies along with the guidance and requirements of the Adventure Activity Licensing Regulations. Leaders of all activities should be working within the terms of reference of their national award.
- 12.4 Leaders of activities are required to upload their award/s onto Evolve and include that information in the Activity Leader Form (ALF) on the Evolve Visit Form. No other register of awards is kept by the Local Authority. The decision as to whether someone is 'competent' rests with the employer. As well as formal qualifications, the employer should make a judgement about their experience, skills and abilities to supervise the activity/group in the planned environment.

### **Competence to lead adventurous activities**

- 12.5 The visit leader must be 'competent' to lead any adventurous activities.
- 12.6 At all times the employer remains responsible for ensuring staff are 'competent' to carry out their duties. Therefore, the headteacher, Governing Body or Academy Trust must ensure staff or volunteers leading or assisting with adventurous activities are competent to do so.
- 12.7 The Health & Safety Executive and the Adventurous Activities Licensing Agency consider competence to be determined in one of three ways:
1. Externally awarded qualifications (National Governing Body or local scheme)

2. In-house training
  3. Significant relevant experience
- 12.8 Evidence of 1. will usually be an NGB/Local award supported by the appropriate syllabus, and for 2. or 3. a Statement of Competence. Such Statement of Competence should be provided by a Technical Adviser who is qualified to assess an equivalent award under an NGB/Local scheme.
- 12.9 It is not sufficient for the headteacher to trust the word of a visit leader that a volunteer is competent. The same checks must be undertaken on volunteers as employees. The employer is responsible for both categories to the same extent.
- 12.10 For most adventurous activities the required level of competence is recognised by a specific qualification, appropriate to that environment. The decision as to whether someone is 'competent' rests with the employer. As well as formal qualifications, the employer should make a judgement about their experience, skills and abilities to supervise the activity/group in the planned environment.

### **Evidence of competence**

- 12.11 Leaders of activities are required to upload their award/s onto Evolve and include that information in the Activity Leader Form (ALF) on the Evolve Visit Form. No other register of awards is kept by the Local Authority. Green Cards and associated codes are no longer used.
- 12.12 EVCs should ensure that staff maintain their own staff profile on Evolve and ensure qualifications and awards are up to date.
- 12.13 EVCs should ensure that where volunteers are used due to their specific qualification or award, they have appropriate notes added to their volunteer profile on Evolve.
- 12.14 At all times, visit leaders relying on a local or national award as evidence of competence, must adhere to the specific training, guidance, advice and syllabus of the award.

### **Risk Assessment process for Adventurous Activities led by Establishment Staff**

- 12.15 If the visit leader is suitably qualified, they should also be technically competent enough to write their own risk assessment for the planned activity.
- 12.16 For all visits the visit leader is required to complete a Standard Operating Procedures form covering the general aspects of the visit; travel, supervision, pupils' medical needs etc.

12.17 In addition to the SOP, the visit leader is required to complete a Visit Specific Risk Assessment. This form need only address the activity specific hazards, for example:

Moorland walking:

- Getting lost
- River crossings
- Military ordnance
- Staff supervision plan and checkpointing
- Etc.

Moorland Camping:

- Correct use of stoves
- Food and water hygiene
- Etc.

Kayaking:

- Correct fitting of buoyancy aids
- Whether helmets are required
- Safe portage of crafts
- Etc.

12.18 The Visit Specific Risk Assessment need not repeat general information contained within the SOP.

### 13 **APPROVAL PROCEDURES**

13.1 For any off-site activity the authorisation of the headteacher is required. The establishment must keep a record of these visits and details may be requested by the Local Authority as part of its statutory supporting and monitoring role. We recommend that these details are held on Evolve.

13.2 Visits in Categories B and C must also be endorsed by the Adviser for Outdoor Education via Evolve on behalf of the Local Authority where the Local Authority is the employer or where the governing body is the employer and formally adopts this policy. This requirement applies to academies and other establishments who subscribe to Babcock LDP for this service.

13.3 All Category B and C visits **must** be notified through Evolve.

13.4 Schools are also encouraged to record all Category A visits (approved within the establishment) through Evolve, so that the establishment has all visits and visits in one place, using one common system. Where Evolve is NOT used for

Category A visits, the establishment must ensure that an equally robust system is used, and records are kept.

Evolve enables schools to:

- share information within the establishment
- share information with the Local Authority
- learn from other schools' use of external providers
- build a record of visits and activities carried out each year
- reduce paperwork
- simplify and speed up approval and endorsement processes
- assist record keeping
- manage health and safety requirements in this area

13.5 For assistance with the Evolve system, please contact the Devon Health and Safety Helpline on 01392 382027 or via email: [healthandsafety@devon.gov.uk](mailto:healthandsafety@devon.gov.uk). Training on Evolve takes place as part of EVC training. EVC training courses take place every year. Find more information on Evolve at: [www.devonvisits.org.uk](http://www.devonvisits.org.uk).

13.6 EVC training can be booked at: <http://www.babcock-education.co.uk/ldp/courses/bookings/> Put EVC in the search box.

## Categories

13.7 There are three categories of activities and associated approval.

Category	Examples of programmes	Approval procedure
A	<p>Day visits not involving adventurous activities</p> <p>Residential visits not involving adventurous activities</p> <ul style="list-style-type: none"> <li>• Examples include farm visits, visits to sites of historic, commercial or cultural interest, most fieldwork, leisure centre visits, ice skating, local walks, journeys to the zoo or theatre etc.</li> <li>• Off-site PE activities and sporting fixtures</li> </ul>	<ul style="list-style-type: none"> <li>• Authorised by the headteacher</li> </ul>
B	<p>Adventurous activities – day visits and residential</p> <ul style="list-style-type: none"> <li>• Outdoor and adventurous activities including those listed in the table below</li> </ul> <p>This includes activities lead by a member of establishment staff or and external provider</p>	<ul style="list-style-type: none"> <li>• Authorised by the headteacher</li> </ul> <p><b>And</b></p> <ul style="list-style-type: none"> <li>• Endorsed by the adviser for outdoor education on behalf of the Local Authority</li> </ul>
C	<p>Overseas and other provision</p> <ul style="list-style-type: none"> <li>• All visits abroad.</li> <li>• Activities in the air – except commercial flying</li> <li>• Any other activity or programme where there is significant concern about safe practice.</li> </ul>	<ul style="list-style-type: none"> <li>• Authorised by the headteacher</li> </ul> <p><b>And</b></p> <ul style="list-style-type: none"> <li>• Endorsed by the adviser for outdoor education on behalf of the Local Authority</li> </ul>

### Category B

Category B activities may take place in hazardous or remote environments and require specific skills, experience and safeguards in order to contain risk at an acceptable level. Approval within the school and endorsement by the local authority

will normally only be given where activity leaders are appropriately qualified and experienced. In addition to technical competence, recognised by qualification, the headteacher should be satisfied that the individual has adequate non-technical skills and judgement to supervise or manage the group in question.

**Category B activities include:**

Camping more than 30 minutes away from shelter or habitation	Canoeing, kayaking, stand up paddle boards
Caving	Coastal and off-shore cruising
Cycling more than 30 minutes away from shelter or habitation (walking distance)	Power boating, rowing, sea fishing from a boat
Horse riding or pony trekking where a riding school or trekking centre is not used	Sailing, windsurfing and kite surfing
Mountain and moorland activities more than 30 minutes away from shelter or habitation	Bushcraft, woodland activities, Forest School and Earth Education.
Rock climbing, including abseiling, on natural crags or using climbing walls which are not on school sites	Snorkelling and sub aqua in the sea or open water
Gorge walking, coasteering or similar combined water and rock activities	Surfing
Snow sports in UK and abroad, including dry slopes	Water skiing, jet skiing
High level ropes courses	Swimming other than in a public pool
Paintball activities	Shooting and archery
Motor sports	Rafting and improvised raft building

**Required minimum timescales for submission to the local authority**

13.8 Where endorsement of visits is required for Category B and C activities, details should be provided via EVOLVE:

**Overseas Expeditions:** at the planning stage for overseas expeditions, before a contract is agreed with any external company.

**Overseas visits:** 3 months or more in advance.

**Residential visits involving adventurous activities:** 2 months or more in advance.

**Day visits including adventurous activities:** 2 weeks in advance.

13.9 *Please note that where there is any doubt about the appropriateness of a visit please add a note to the 'LA' on the Evolve visit form.*

## **14 PARENTAL COMMUNICATION AND CONSENT**

### **Consent forms and checklist of information to parents, guardians and carers**

14.1 For clarification, parental consent can be considered in three layers:

#### **No consent required**

14.2 Schools are not required to obtain consent from parents for pupils to participate in off-site activities that take place during school hours and which are a normal part of a child's education, such as local studies and visits to a museum or library etc. (*the Education Act 2002*, section 29).

14.3 While parents do not have the option to withdraw their child from the school curriculum, it remains good practice to inform parents that a visit or activity is to take place (see 'informing parents' below). Schools should be aware that asking for consent when it is not needed can lead to some parents assuming they can withhold consent and so withdraw their child from a curriculum visit when this is not the case.

#### **Consent required**

14.4 Consent is needed for all visits organised by establishments or services other than schools i.e. youth service and fostering.

14.5 Consent is needed for all visits including nursery age pupils.

#### **Annual Consent**

14.6 Consent **is** needed by schools for visits taking place outside school hours (early starts, late finishes, weekends and residentials) and also for activities taking place both during and outside school hours where it is perceived to involve a higher level of risk, such as a residential, overseas visit or including an adventurous activity.

14.7 One-off or blanket consent provides evidence that parents have consented **in advance** to all visits and activities, which require their consent.

14.8 However, it is essential that such blanket consent be turned into informed consent prior to any visit. Therefore, where 'one-off' annual consent is used, parents must be given information about the visit and their child's proposed participation and given the opportunity to withdraw their consent should they not

wish them to participate. This can be by a letter to parents about the planned activity.

- 14.9 The letter detailing the visit to parents will be a reminder of consent given and could also be an opportunity to update participant information.

### **Visit-specific consent**

- 14.10 While one-off consent can be used for many situations, when consent for a specific visit is required this must be informed consent, whereby parents are given full details of the planned visit including locations and planned activities.

- 14.11 The Local Authority policy is that schools should gain visit-specific consent for:

- Visits including adventurous activities
- Residential visits
- Overseas visits

### **Curriculum visits involving religious education or sex and relationship education**

- 14.12 Parents have a right to withdraw their children from Religious Education lessons, from collective acts of worship and from some elements of Sex and Relationship Education, but not from the National Curriculum. This means that parents do not necessarily have the right to withdraw their child from a visit to, for example, a place of worship, if this visit forms part of the school's delivery of the National Curriculum. It is therefore important for visit leaders to be clear about the purpose of the visit, including the wider personal, social and cultural benefits and its link to the curriculum.

### **Informing parents**

- 14.13 Where consent is required the key is to provide parents with sufficient information to make an informed decision about the participation of their child. Such information may be given in a variety of ways, as the information needed by parents will depend on the nature and complexity of the visit. For example, regular sports fixtures or cultural visits may involve information being given for the season or for the term ahead with parents being informed of any changes to this as they occur, perhaps by note, phone, email, text etc. For more complex visits specific information letters will be needed and for the most complex or adventurous visits a combination of written information and briefing/information meetings may be most appropriate.

- 14.14 Inevitably last-minute opportunities will arrive for exciting learning opportunities and the mechanisms for communicating with parents and gaining informed consent should support these. Verbal consent via a telephone call is perfectly acceptable in such a situation (and when parents are unable to give consent in

writing) but it would be wise to note the time and date of the phone call, who made it and who gave consent.

14.15 For all visits parents should be kept informed of arrangements and of any extra safety measures required; see the chart below:

1	Dates
2	Objectives of visit or activity
3	Times of departure and return, including location for meeting parents
4	Method of travel including name of any travel company
5	Accommodation with address and telephone number, including details of host families for exchange visits
6	Emergency contact arrangements, at home and away, if all young people are not at one centre. Consider using a 'telephone tree' to make easy and rapid contact with a large group of parents, for things like changes to transport arrangements
7	Name of visit leader and accompanying staff. Clear information where the visit leader is not attending the visit, for example where an external provider or coach is engaged
8	Names and status (such as parent or member of the governing body) of other accompanying adults who will have some responsibility during the visit
9	Details of activities planned. Any activity involving special hazards must be clearly specified
10	Charges or voluntary contributions and what they cover
11	Methods of payment and cancellation arrangements
12	Insurance used for baggage, personal accident, cancellation and medical cover for the group members. Send a photocopy of the insurance schedule to all parents or state that a copy of the schedule can be obtained from the visit leader if needed
13	Clothing, footwear and other items to be taken. Prohibited items may need to be highlighted
14	Money to be taken
15	Code of conduct and details about the standard of behaviour expected from the group during the visit, including, where appropriate, rules on general group discipline, smoking, sexual behaviour, illegal substances and alcoholic drinks
16	Parents should complete a medical form for all residential visits and give their written consent for emergency medical treatment

14.16 Parents should be invited to a planning meeting, especially where a residential experience is involved or for visits abroad. This provides the opportunity for everyone to be fully informed and to raise issues which may be difficult to address

in writing. For young people over the age of 18 a parental consent form is not needed.

14.17 If a young person is in the care of the local authority their care plan should say who can consent to off-site activities.

## **15 MONITORING**

15.1 The headteacher and the EVC should ensure that there are suitable arrangements to monitor educational visits and off-site activities so that they have a sound picture of practice during those visits and activities. This may include:

- more detailed discussion with the visit leader and other staff about proposed plans on a sample basis
- identifying a senior member of staff who may accompany visits on a sample basis to observe some or all of the provision, to help identify areas of good practice and areas for improvement
- reviewing the outcome of visits with the visit leader to discuss outcomes and any incidents which may have occurred

## **16 SUPERVISION/RATIOS**

16.1 There are many variables which govern appropriate staffing: pupil ratios. Decisions about staffing and supervision should take into account:

- The nature and duration of the visit and the planned activities
- The location and environment in which the activity is to take place
- The nature of the group including the number of young people and their age, level of development, gender, ability and needs (behavioural, medical, emotional and educational)
- Staff competence – inexperienced staff should not be counted as group members
- The consequence of a member of staff being indisposed, particularly where they will be the sole leader with a group for any significant time, or where the group is remote from the school such as an overseas visit.
- the nature of any planned activities
- the duration and nature of any journey
- the need to maintain a complete programme of supervision
- the type of accommodation
- supervision requirements required by airlines

16.2 Staffing: pupil ratios are a risk management issue and should be determined through the process of risk assessment. It is not possible to set down definitive staff/participant ratios for a specific visit. The following ratios should be considered as a starting point for consideration rather than being definitive; although if the ratio is exceeded, an explanation should be put in the 'enhanced risk assessment' column of the Standard Operating Procedures.

- 16.3 **The Local Authority recommends that there should be at least two adults on all visits.** However, where there is only one adult supervising a visit, (i.e. PE fixtures at another school), the employer must consider the implications within their establishment's Lone Working and Safeguarding policies and annotate the reasons why one member of staff is acceptable in the SOP's enhanced risk assessment' column.
- 16.4 When staff are 'lone working' with pupils they should consider what advice is given to pupils in the event of the visit leader becoming incapacitated. For secondary age pupils it may be appropriate to use an advice sheet kept in a minibus or leader's rucksack. An example can be found at: Evolve/Resources/Guidance & Policies/Emergency Action/Teacher Down.

#### **Early Years Foundation Stage (0 – 5 years inclusive):**

- 16.5 The Early Years Foundation Stage (EYFS) Statutory Framework (updated April 2017) no longer sets out different requirements for minimum ratios during visits from those required on site. Ratios during visits should be determined by risk assessment which should be reviewed before each outing. The appropriate ratio on an outing is likely to be higher than the legal minimum required for on-site supervision but this should be based on the risk assessment, type of outing, qualification of the teacher, age of the pupils and pupils' needs. This can be complicated to work out – see <https://www.foundationyears.org.uk> for further advice. Below are the Local Authority's recommended ratios:
- 16.6 Recommended minimum ratio of 1 adult to 6 group members.

#### **6 years and over for Category A visits:**

- 16.7 Recommended minimum ratio of 1 adult to 15 group members.
- 16.8 There may be occasions, particularly in the use of school transport, journeys between school sites or in the neighbourhood of the school, where the above ratio may reasonably be changed as decided by individual headteachers, based on an assessment of risk. Headteachers should be able to justify their ratio decision.

#### **6 years and over for Category B visits led by external providers:**

- 16.9 A minimum ratio of 1 adult to 15 group members.

#### **6 years and over for Category B visits led by establishment staff:**

- 16.10 Minimum ratios are specified for specific adventurous activities led by establishment staff in Section 4.
- 16.11 For other non-specified activities guidance on ratios may be determined through risk assessment and advice sought from the Adviser for Outdoor Education (via Evolve) but will generally not exceed 1 adult to 10 group members.

## **6 years and over for Category C visits:**

16.12 A minimum ratio of 1 adult to 10 group members.

### **Improved staffing ratios**

16.13 Any alteration to the recommended ratios and staffing outlined above should be informed by risk assessment and recorded in the 'enhanced risk assessment' column of the Standard Operating Procedures.

16.14 Where the children of staff members are also on the visit, consideration must be given to any possible conflict of interest. Ideally, children of staff should be of the same age and ability as the rest of the group, and able to join the programme as a full member. Where this is not the case, supervision of these children should be undertaken separately to the rest of the group, and the staff to participant ratio adjusted accordingly. This should be noted in the risk assessment for the visit. The Local Authority recommends that if children of staff members are on the visit then that staff member should not be the visit leader.

### **Ratios for special needs provision**

16.15 For special needs groups a minimum ratio of 1 adult to 6 group members is recommended subject to the visit leader's own risk assessment based on their knowledge of the needs of the pupils and the activity.

16.16 The Individual Health Care Plan for each young person who has special needs will help to determine the degree of additional support they need for off-site activities. Young people with special needs, like all young people, should be encouraged to participate in as rich a variety of outdoor education as possible.

16.17 When young people with special needs are working with external providers, for example at an outdoor centre:

- allow sufficient time for discussion and outlining procedures - activities may need to be explained one step at a time, making clear what is expected of participants
- the respective roles of the group leader and the instructor may need to be discussed prior to an activity
- external staff will need to be informed of the special needs of group members.
- a procedure with the instructor should be established for withdrawing any participant if needed
- close attention should be given to medical and dietary needs and any emergency medical procedure – a system of communication may need to be agreed between staff and participants

## **Definitions of 'Supervision' by the Visit Leader and accompanying adults**

- 16.18 **Direct supervision** is where an adult (staff or volunteer) is with a young person / group.
- 16.19 **Indirect supervision** is where young people are unaccompanied by an adult (staff or volunteer) but said adult is in the vicinity; for example; in a museum, shopping centre, or "down-time" at an activity centre. As pupils age and gain more responsibility, the distance and length of time they are under indirect supervision can be extended. This decision must be made by the visit leader and confirmed by the headteacher and included in the SOP/enhanced risk assessment.
- 16.20 **Remote supervision** is a term specific to adventurous activities such as moorland walking where an adult is a significant distance away from the group (often in remote environments) and are not able to provide assistance immediately. The decision when and how to remotely supervise groups during adventurous activities must be made by the visit leader in line with training undertaken to gain their relevant leadership award, and confirmed by the headteacher as part of the approval process.

### **Supervision by support staff (establishment employees)**

- 16.21 The extent of support staff involvement will depend on a risk assessment of the activity and the competence of the support staff in managing young people and their expertise in specific activities which would include any relevant prior experience, training or qualifications they may hold. Support staff should not be given responsibilities beyond their competence and their responsibilities. Specific roles and responsibilities should be outlined in the SOP.
- 16.22 Support staff should be involved in planning and organisation of the visit but the level of this involvement will depend on the qualifications, role and experience of the individual.

### **Supervision by volunteers**

- 16.23 Volunteers can be an essential part of the visit. Either to improve supervision ratios i.e. parents supporting primary school visit to a venue such as a zoo or museum etc. or due to the volunteer holding a specific leadership award such as mountain leader etc.
- 16.24 Volunteers should be appropriately briefed on the nature of the visit and the needs of the group, and where appropriate their input should be sought into the management of the visit including risk management.
- 16.25 The visit leader should ensure that any volunteers' involvement is in line with the establishment Safeguarding Policy including DBS checks where necessary.

16.26 The headteacher must ensure the appropriate steps have been taken as part of the authorisation process.

### **Supervision by external providers**

16.27 In circumstances where an external provider is supervising pupils and no school staff are present, the specific arrangements need to be in writing.

## **17 FIRST AID**

17.1 First aid should form part of the risk assessment for off-site activities.

17.2 One of the supervisory staff undertaking off-site activities should be a competent first aider. As a minimum, there must be a person responsible for first aid arrangements. An appointed person is someone identified to:

- Take charge when someone is injured or falls ill, including calling an ambulance, if required
- Look after the first aid equipment
- Competence may be recognised by prior knowledge and experience, or preferably, as a result of formal training

17.3 The level of staff competence required will depend on many factors including:

- the nature of the programme
- whether the programme includes adventurous activities
- the number in the party
- the age of the pupils
- the extent to which outside first aid assistance is available i.e. whether in an urban or remote location
- the environment and environmental hazards
- the health and medical needs of individual group members

17.4 There is a legal requirement for a first aider trained in paediatric First Aid to be present for all outings involving pupils up to 5 years of age.

17.5 The Dartmoor Centres provide 'First Aid for the Outdoors' courses under the remit of Mountain Medicine. These courses are specifically geared towards the outdoor environment. Full details of these awards from:  
[www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training)

17.6 A valid first aid certificate is a pre-requisite for many outdoor leadership qualifications for example Mountain Leader Training England, Royal Yachting Association, Canoe England or South West Mountain and Moorland Leader Training Scheme.

### **First aid kit**

- 17.7 For all activities and the associated journey an appropriate first aid kit should be available and its stocks regularly replenished. The visit leader and other staff should be aware of its contents and know how they should be used. All staff should know how to contact the emergency services in this country or abroad, if applicable.

## **18 TRAVELLING ARRANGEMENTS**

### **Managing groups when travelling**

- 18.1 The level of supervision required in a vehicle should be considered as part of the overall risk assessment process.
- 18.2 The transport needs of young people with special educational needs or a medical condition should be assessed. This will help determine what type of supervision, what equipment and what type of vehicle is needed to transport the young person.
- 18.3 If a vehicle needs to stop in an emergency the occupants of the vehicle should remain together under the direct supervision of a responsible adult until assistance arrives. The group leader should normally evacuate the vehicle and move the group to a position behind the safety barrier on a motorway or well away from moving traffic.
- 18.4 Your school's SOP should describe the control measures needed for travelling by foot, car, ferry, air, public transport or coach.

### **Using teachers' or parents' cars for transporting pupils**

- 18.5 Your school's SOP should describe the control measures needed for using teachers or parents' cars for transporting pupils.
- 18.6 A draft letter for schools and other establishments to send to parents and volunteers who use their cars to transport pupils is available. There is also a form for parents and volunteers to return to the school, indicating they have read and understood the requirements.
- 18.7 Advice on seatbelts and child restraints can be found for Devon establishments in HS56/HSA56 Transport arrangements and for Torbay contact the health & safety team on 01803 207170.

### **Use of Minibuses**

- 18.8 The use of minibuses by schools and who can drive them is often misunderstood. DCC's Transport Coordination Service no longer gets involved in issuing documentation for taking a minibus abroad.

- 18.9 See 'Driving school minibuses' Advice for schools and local authorities, (September 2013):

[www.gov.uk/government/publications/driving-school-minibuses-advice-for-schools-and-local-authorities](http://www.gov.uk/government/publications/driving-school-minibuses-advice-for-schools-and-local-authorities)

### **Hire or reward**

- 18.10 A vehicle which is operated for hire or reward is one where payment is made, in cash or in kind, for the carrying of passengers, or matters which include the carrying of passengers, irrespective of the person to whom the payment is made. This includes direct payments such as a fare or an indirect payment which gives a person an opportunity to travel. It does not matter whether or not the operator is a profit-making entity. A minibus is used for hire or reward if there is a clear and logical link between payment and the transport provided and that link is not too remote.
- 18.11 Therefore the majority of school visits using minibuses are deemed to be 'for hire and reward' as money has changed hands (parents have paid for children to go on the visit) and as part of that visit a minibus is used. There does not need to be a specific charge for the minibus.

- 18.12 DCC vehicles are no longer available for schools or youth centres to hire.

### **Section 19 permits**

- 18.13 See: [www.gov.uk/government/publications/section-19-and-22-permits-not-for-profit-passenger-transport/section-19-and-22-permits-not-for-profit-passenger-transport](http://www.gov.uk/government/publications/section-19-and-22-permits-not-for-profit-passenger-transport/section-19-and-22-permits-not-for-profit-passenger-transport)
- 18.14 These permits allow the holder to operate transport services for 'hire or reward' without the need for a full public service vehicle (PSV) operator's licence.
- 18.15 A separate permit must be applied for and displayed in each minibus. Where establishments occasionally hire additional mini-buses, spare permits should be obtained. The permit does not relate to who owns the vehicle, but who is operating it.
- 18.16 These permits only apply within the UK. See driving a minibus abroad below.
- 18.17 Torbay Schools, Devon schools, academies and independent schools should obtain permits from the Traffic Commissioner. See: [www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372](http://www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372)

## Driving licence categories

Category	Vehicle covered	Explanation
<b>D</b>	Passenger carrying vehicle (PCV) of any size	Able to carry more than 9 passengers (no upper limit) i.e. coaches
<b>D1</b> Driving test passed before 1 January 1997	Passenger carrying vehicle (PCV) Minibuses	Able to carry 9 - 16 passengers including 'for hire and reward'
<b>D1 Restricted</b> Driving test passed since 1 January 1997	Minibuses restricted to non PCV use	Able to carry 9 - 16 passengers but only if not 'for hire and reward'
<b>B</b>	Cars	Including people carriers up to 8 passengers

### Driver competence

18.18 Whilst a person may hold a licence allowing them to drive a minibus, it is up to the employer to ensure they are competent to do so. A person may have passed their driving test several years ago but have only ever driven a small car or not driven a minibus at all. Employers are required to provide appropriate training for staff to 'carry out their duties' (the Act). To this end additional minibus driver training is recommended. Get additional training in driving minibuses from Red One. Visit: [www.devon.gov.uk/devondriverscentre](http://www.devon.gov.uk/devondriverscentre); phone: 01392 444773 or Email: [drivers@devon.gov.uk](mailto:drivers@devon.gov.uk)

### Devon County Council employees

18.19 Any Devon County Council member of staff or volunteer driving any minibus on a school journey or similar programme must be a council approved minibus driver, through having satisfactorily completed the minibus test or obtaining a PCV driving licence prior to driving passengers in a minibus. Refresher training must also be done every four years.

### Torbay Council

18.20 Drivers of a Torbay Council owned minibus must have a D1 licence, have undertaken a Devon County Council minibus test and the in-house course through Torbay Council, and a copy of the driving licence must be sent to the Tor2 Garage and be registered with them for insurance purposes. Requirements for school owned vehicles will be determined by individual schools in accordance with their insurance company requirements.

## **Vehicle loading on minibuses and other vehicles**

- 18.21 The driver is responsible for any load carried. There must be uninterrupted access to all doors; luggage and equipment must not block gangways or doors or access to them. Doors must be left unlocked when the vehicle is carrying passengers.
- 18.22 The balance of the vehicle must also be considered, particularly when roof racks or trailers are used. The manufacturer's maximum permitted weight must not be exceeded. This is commonly 100kg on a Ford Transit minibus and 90 kg on an LDV.

## **Towing**

- 18.23 Passengers should not be carried when towing a trailer if the emergency doors (the second doors in addition to the normal access door) are rear-facing, as in the event of an accident the trailer is likely to block the emergency doors. Any minibus carrying passengers while towing should have a separate emergency door fitted at the rear offside, if necessary in addition to rear facing doors.
- 18.24 Note that drivers must comply with driver licensing requirements for towing trailers. See: [www.gov.uk/towing-rules](http://www.gov.uk/towing-rules). INF 30 'Towing Trailers in Great Britain' is available from the DVLA: [www.dvla.gov.uk](http://www.dvla.gov.uk)

## **Taking a minibus abroad**

- 18.25 The law relating to driving a minibus abroad is significantly different to that within the UK. Where the visit is for 'hire and reward' (as specified above) the driver must hold a full PCV licence (D1 without 101 restriction) gained by passing a separate DVLA driving test (not a certificate of competence test).
- 18.26 For this reason alone it is unlikely that school staff will be entitled to drive a minibus abroad. If staff (or volunteers) do hold a full PCV licence there are considerable demands placed on the driver and establishment to meet additional vehicle and documentation requirements. Including the establishment holding a Public Service Vehicle Operator's Licence.
- 18.27 If you intend to take a minibus abroad on a school journey please contact the Adviser for Outdoor Education.

## ***For Devon establishments***

- 18.28 Get additional training in driving minibuses from Red One, phone: 01392 444773
- 18.29 Transport for Schools: The HS/HSA56 Transport arrangements is available on *Inside Devon* or OSHENS.

### ***For Torbay establishments***

- 18.30 Torbay Children's Services Transport Team;  
[www.torbay.gov.uk/schooltravelsupport](http://www.torbay.gov.uk/schooltravelsupport); email: [transport.co-ordination@torbay.gov.uk](mailto:transport.co-ordination@torbay.gov.uk) or phone: 01803 207685
- 18.31 Devon County Council maintains an Approved Bus and Coach Operators List to enable schools to identify operators who are able to provide vehicles and drivers to a minimum standard at all times. This includes seatbelts on all seats and drivers who are DBS checked to the enhanced standard.
- 18.32 Find more information for Devon:  
Email: [envtcsqf@devon.gov.uk](mailto:envtcsqf@devon.gov.uk) or phone: 01392 382886  
The Transport Co-ordination Service, Matford Offices, County Hall, Exeter, EX2 4QD.  
[www.devon.gov.uk/school\\_care\\_transport](http://www.devon.gov.uk/school_care_transport)  
Phone: 01392 382886
- 18.33 For more information for Torbay:  
Torbay Children's Services Transport Team  
[www.torbay.gov.uk/schooltravelsupport](http://www.torbay.gov.uk/schooltravelsupport)  
Email: [transport.co-ordination@torbay.gov.uk](mailto:transport.co-ordination@torbay.gov.uk) or phone: 01803 207685

## SECTION THREE

### 19 ADVICE AND GUIDANCE FOR SPECIFIC VISITS AND ACTIVITIES

19.1 Certain types of visit require more detailed planning and may require specific staff competency or qualifications. Advice on the following types of visit can be found below:

- Safety at the water margins
- Beach and coastal safety
- Walking in non-remote environments
- Educational visits to farms, wildlife parks and animal sanctuaries
- Sponsored walks and large-scale events
- Residential visits
- Trampoline parks
- Theme parks, water parks, funfairs etc.
- Visits abroad
- Overseas expeditions
- Exchange visits

**Safety at the water margins (for swimming or adventurous activities see section three)**

19.2 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

19.3 Paddling (either on its own or as part of rock pooling or pond dipping) may be permitted where there is no intention of swimming or, likelihood of individuals being beyond the direct control of supervising adults, provided risks have been assessed and there is adequate supervision.

19.4 Paddling is always with clothes on (not a swimming costume), in water lower than the child's knee.

19.5 Good practice should include adults marking the boundaries of the safe supervised area, for beaches this would be both out to sea and along the shoreline.

19.6 It is recommended that adults each have responsibility for a small group, rather than all adults having oversight of all pupils. Closer supervision may be required where rocks or vegetation obscure adults vision.

19.7 Relevant training is provided by The Royal Life Saving Society under their Water Safety Management Programme. This is a modular programme including theory sessions about water safety and practical rescue methods. Participants need not complete all modules.

[rlss.org.uk/professional-qualifications/nwsmp/](http://rlss.org.uk/professional-qualifications/nwsmp/)

- 19.8 The former Department for Education provided 'Group Safety at Water Margins'. This guide is aimed at anyone who organises learning activities that take place near or in water such as a walk along a river bank or seashore, collecting samples from ponds or streams, or paddling or walking in gentle, shallow water. This booklet remains a good source of advice and guidance, and is available for download at:

[webarchive.nationalarchives.gov.uk/20130323074033/https://www.education.gov.uk/publications/eOrderingDownload/water%20margins.pdf](http://webarchive.nationalarchives.gov.uk/20130323074033/https://www.education.gov.uk/publications/eOrderingDownload/water%20margins.pdf)

**Beach and coastal safety (for swimming or adventurous activities see section three)**

- 19.9 The local beaches and coastal areas offer a wide range of opportunities for study and activities. However, whilst presenting many opportunities and interests, areas where the land meets the sea present their own hazards.

19.20 When planning activities in coastal areas consider:

- tides, swell, wind, currents, beach profile and sandbanks
- exit routes checked in advance and at all times during the activity

19.21 Beaches present their own problems, particularly when large numbers of the general public are present:

- Establish a base where 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, 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
- Seaweed covered rocks may make surfaces slippery
- Be prepared to seek advice from the Coastguard, the RNLI or from the LA via notes on Evolve visit forms

19.22 Information on swimming, other than in public pools, in open water, rivers, lakes and the sea, is included in the Outdoor and Adventurous Activities Section Four.

**Walking in non-remote environments**

19.23 Non-remote' is defined as the group being no more than 30 minutes (group walking speed) from a road or refuge at all times during the activity.

- 19.24 Therefore, most countryside and coastal activities fall within category A and no specific leadership qualification required.
- 19.25 However, the visit leader will need to take note of additional hazards when supervising groups in such environments. Hazards in coastal or tidal areas should not be underestimated even if close to habitation and the visit leader must be suitably competent to lead the activity, as determined by the establishment's headteacher.
- 19.26 The visit leader should have visited the location and walked the route or should have sufficient knowledge or experience to be able to address any unexpected problems, i.e. blocked footpath, eroded cliff path etc.
- 19.27 There is significant difference between a primary school walk through farmland and a secondary school bronze Duke of Edinburgh Award Expedition walk, though they may take place in exactly the same environment. Therefore, the purpose, duration, age of participants and outcomes must be considered in determining the visit leader and accompanying staff competence.
- 19.28 The Duke of Edinburgh Award Scheme has its own requirements for leader qualifications dependant on the terrain/activity, contact your local DofE Award Officer for more information.
- 19.29 Other safety factors will need to be considered as appropriate: clothing and equipment, manageable group size, adequate communications and control of the group.
- 19.30 All these factors will be informed by and recorded in your risk assessment process.

### **Educational visits to farms, wildlife parks and animal sanctuaries**

- 19.31 Visits to working farms are a regular feature of education for young people from both rural and urban environments. Such visits are beneficial to young people, helping them to appreciate the origin of their food and learn about aspects of rural life.
- 19.32 The Countryside Educational Visits Accreditation Scheme (CEVAS) accredits farm staff who are working with school groups and endorses the farm premises as being appropriate for school visits: [www.visitmyfarm.org/cevas-farmer-training](http://www.visitmyfarm.org/cevas-farmer-training)
- 19.33 The Learning Outside the Classroom Quality Badge is available to farms through the CEVAS scheme.
- 19.34 Farms that do not provide adventurous activities are not required to complete a Provider Questionnaire (form SOE5). However, the farm should confirm they

hold appropriate public liability insurance, minimum £5 million.

### **Farm related risks**

- 19.35 Experience over recent years shows that visits to farms can carry a small risk to 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.
- 19.36 In addition, pupils' fingers may become contaminated with animal faeces which is then transferred to their mouths when eating or simply sucking their fingers or thumbs. Pregnant women are advised to avoid visits to livestock farms, particularly during lambing.

### **Health and safety precautions**

- 19.37 Farmers and visit organisers need to be aware that visitors may be more susceptible to infection from the farm environment and its products than are those who live in that environment. Prevention depends primarily on simple hygiene measures which, if followed, will help ensure the visit is well-managed and safe. Parents, teachers and young people should be made aware of these measures and they should be re-emphasised before and during the visit.

#### ***For visit leaders:***

- Carry out a pre-visit to identify specific hazards and discuss objectives
  - Ensure young people with cuts or abrasions to cover them with a plaster
  - Provide a briefing for young people at the farm to cover safety points
  - Ask young people to keep their fingers out of their mouths and not to eat refreshments until they have washed their hands
  - Young people should not sample, taste or take away any animal feed stuff or raw milk or drink from farm taps
  - Pupils should be closely supervised if direct contact with animals is likely. If this happens they should be made to wash their hands afterwards. They should not be allowed to kiss or put their faces close to the animals
  - Pupils and adults with asthma or hay fever may experience difficulty at certain times of year
  - Be aware of moving machinery, such as tractors, and do not allow pupils to touch any machinery or tools unless directly supervised
- 19.38 Particular care must be taken by expectant mothers if visiting farms during lambing season.
- 19.39 Although the guidelines have been written with farms in mind, the general principles should be followed when visiting similar establishments such as zoos

and wildlife reserves.

### **Establishments organising sponsored walks and large-scale events**

- 19.40 Establishments must be clear about their legal responsibilities when organising events and inviting the participation of the public, young people or other schools. Any limitations to, or conditions of supervision or responsibility must be clearly shared with event users.
- 19.41 There are particular hazards associated with large scale events and from undertaking sponsored walks on roads. Check with local police where necessary. Consider alternative routes or means of achieving the same objectives, such as the use of a non-road environment or different activity.
- 19.42 Consideration should be given to weather and environmental factors:
- Adequate shelter if cold or wet weather is forecast
  - Shade and water if hot weather is forecast (with means to replenish water)
  - Adequate and timely information to participants about weather and environmental factors and what is expected of participants and what is offered by the organiser
  - Emergency transportation of participants and staff
  - Marshalling and check pointing
- 19.43 Clear communication must take place between the organising establishment and participants detailing who is responsible for what.
- 19.44 For large scale events on Dartmoor see:

[www.dartmoor.gov.uk/enjoy-dartmoor/events/organising-an-event](http://www.dartmoor.gov.uk/enjoy-dartmoor/events/organising-an-event)

### **Residential visits**

- 19.45 Residential visits in the UK that do not include an adventure activity are Category A visits and only require the authorisation of the headteacher. Where required advice can be sought from the Adviser for Outdoor Education though evolve visit notes.
- 19.46 Your school's SOP should have the control measures for managing a residential visit. There may be additional control measures added to these for the specific visit you are considering.
- 19.47 Residential visits could involve a visit to an outdoor centre, a youth hostel, a caravan/holiday park or hotel etc. The supervision of any group overnight involves additional responsibilities for the visit leader and other staff.
- 19.48 Providers of residential accommodation in the UK should complete a provider

questionnaire (form SOE5) to confirm standards of provision meet council expectations. Providers of residential accommodation who hold the Learning Outside the Classroom Quality Badge do not need to complete form SOE5.

- 19.49 Campsites where the establishment (or pupils) provide its own tents and cooking arrangements are **not** classed as residential providers and do not need to complete form SOE5. Visit Leaders should ensure the facilities meet the groups needs and that the group is appropriately supervised in areas used by other campers, the public.
- 19.50 Where accommodation is in tents, yurts or cabins the visit leader should satisfy themselves that adequate security arrangements are in place and should make clear notes in the enhanced risk assessment column detailing how tents are to be arranged, tent groups, staff proximity, overnight use of toilets etc.
- 19.51 When selecting residential providers, the visit leader should consider;
- Dormitories should normally be for a group's exclusive use
  - Are all group members in the same area/wing/floor
  - Whether security arrangements are adequate to stop unauthorised visitors.
  - When using hostels or hotels the visit leader should check how many keys are available for each bedroom and where they are kept avoiding the re-issuing of rooms keys to other guests in error
  - Young people should be able to contact members of staff in the event of an emergency overnight
  - Supervisory staff should ideally be accommodated in rooms adjoining or close to their group
  - Young people and staff should know the lay out of the accommodation, key personnel, fire precautions and exits and necessary regulations and routines
  - Access should be available to groups' rooms at all times by members of the accompanying staff
- 19.52 A list of names must be provided by the visit leader to the provider where a residential stay is. This should include other relevant information such as medical and dietary needs. It is not necessary to share full parental consent and contact information with the provider.
- 19.53 The selection of a reputable tour operator is recommended where appropriate. This should form part of the risk assessment process. Establishments should ask operators to confirm their safety management procedures and say if they have been externally verified. The School Travel Forum was formed in 2002 and has developed a code of practice which its members must adhere to, see [www.schooltravelforum.com](http://www.schooltravelforum.com) or hold a Learning outside the Classroom Quality Badge.

### **Trampoline Parks**

- 19.54 The emergence of trampoline parks and similar leisure facilities without a national

governing body or nationally accredited safety standards has led to concerns. **At present the Local Authority will only endorse visits to trampoline parks where the activity is led by a British Gymnastics qualified coach.** This is in line with advice from the Association for Physical Education, which is the most appropriate body to seek advice from.

19.55 Whilst we have seen an increase in the number of trampoline parks in the South West rise from 1 to 5 in the last 2 years, the regulation of such parks has been slow to respond to the increase. There are plans in place for trampoline parks that are members of the International Association of Trampoline Parks to ensure their facilities meet certain standards which is welcomed but not completed yet and not all trampoline parks are members of the Association (there is no other professional body).

19.56 RoSPA is also keen for parks to improve their safety;  
[www.rospa.com/play-safety/advice/trampolines/](http://www.rospa.com/play-safety/advice/trampolines/)

19.57 The Outdoor Education Advisers' Panel has not been able to make a definitive statement on such parks as there is considerable variation in the quality and safety of such centres. There is also concern amongst medical practitioners about the extent and nature of injuries suffered at trampoline parks see; British Medical Journal - Injury Prevention Press Release - Trampoline park injuries "emerging public health concern".

[www.bmj.com/company/wp-content/uploads/2016/08/trampoline-injuries.pdf](http://www.bmj.com/company/wp-content/uploads/2016/08/trampoline-injuries.pdf)

19.58 The Local Authority is very clear in that it does not recommend any particular provider, instead it sets down minimum expectations of coaching (as detailed above) and is prepared to endorse visits to any parks that can meet these standards.

19.59 Another concern is the requirement of some trampoline parks for customers to sign a 'waiver'. The Local Authority will not endorse visits to any provider (for any activity) where customers are required to sign a waiver. See page 16.

19.60 It is understood that many adventurous activities bring a certain level of risk, and that participation will always be a balance of risk v reward, however for the more mature activities such as climbing or water sports, these risks have been well understood for decades and remedial action taken over time, as well as having robust safety regulations such as the Adventurous Activities Licensing Agency licensing scheme and formal national governing bodies. The same cannot be said for trampoline parks, at present.

### **Theme parks, water parks, funfairs, etc**

19.61 Visits to theme parks and water parks, funfairs or similar are Category A. Whilst they may offer an element of fun, they are not classed as 'adventurous activities'

by the local authority. As such these places should be recorded as 'venues' on Evolve. Such companies are **not** required to complete a provider questionnaire (form SOE5).

- 19.62 Visit Leaders should ensure the facilities meet the groups needs and that the group is appropriately supervised in areas used by other venue users. As with all venues Visit Leaders are not expected to seek risk assessments from these venues. In law they must provide a safe environment for customers. Travelling fun fairs are licensed by the local authority.

### **Visits abroad**

- 19.63 A minimum staffing ratio of 1 adult to 10 group members is recommended for visits abroad with a minimum of two adults, at least one of whom should be a member of employed school staff. For more complex visits early notification to the Local Authority is required, this can be achieved by adding a note to the visit from on Evolve at the initial planning stage, often a year or more in advance.
- 19.64 For all visits abroad the visit leader should be aware of the latest advice from the Foreign and Commonwealth Travel Advice Unit at: [www.fco.gov.uk](http://www.fco.gov.uk) click on 'Travel Advice' then search by country.
- 19.65 Visit leaders should consider recent or heightened threats of terrorist activity as part of their risk management plan. This must include travel through major travel hubs as well as destinations. As part of the safety management plan all groups members should be provided with emergency action cards detailing contact numbers, addresses and useful phrases in the native language.
- 19.66 Actions specific to emergencies when travelling abroad must be detailed in the enhanced risk assessment column of the school SOP. Consider a number of 'what if' scenarios as part of the risk management process. Ask and answer questions such as, 'What would I do if... a young person got lost, was ill, was caught shoplifting and arrested or lost a passport or the group was stranded due to transport failure?'

### **Tour Operators**

- 19.67 Groups should seek to use the services of a reputable tour operator experienced in group travel. Air travel organisers may be licensed through ATOL (Air Travel Organisers Licence) for all or part of a package. It is recommended that establishments use tour companies which are members of a Department of Trade approved bonding body; such as the Association of British Travel Agents (ABTA) or the Association of Independent Tour Operators (AITO). Ensure you have ready access to your insurance company telephone number.
- 19.68 It is also recommended that groups choose where possible a tour operator that holds the Learning outside The Classroom quality badge, and / or is registered

with the Schools Travel Forum. Additional checks may also be required to confirm the financial stability of the company.

- 19.69 The form SOE5 should be used if the operator does not have hold the Learning outside The Classroom badge. These checks should be completed BEFORE any booking is made or deposit paid.
- 19.70 In addition to the Planning Checklist in the appendix page 89, visit leaders planning visits abroad should:
- Ensure they meet the required time scales for notification of the visit as set out in page 20
  - Identify whether there are medical requirements imposed by the country being visited
  - Ensure all participants have a European Health Insurance Card (EHIC) for all visits to member countries of the European
  - Ensure all members of the party carry the address and telephone number of the hotel or hostel in case of separation
  - Identify an emergency contact for parents
  - Brief young people about any local hazards and emergency procedures, including the use of telephones
  - Discuss any local customs and cultural issues
  - Agree codes of conduct with young people
  - Check visa and passport requirements - photocopies of passports and other essential documents may prove useful.
  - Consider language ability as part of the risk assessment process
- 19.71 Advice on medical matters abroad or vaccinations required is available from:  
<http://www.travelhealthconsultancy.co.uk/>

### **Collective (group) passports**

- 19.72 For details about collective passports and other passport enquiries visit:  
[www.gov.uk/collective-group-passports](http://www.gov.uk/collective-group-passports)

### **Overseas Expeditions**

- 19.73 Expeditions by schools to remote areas and to developing countries, are becoming increasingly common. Such expeditions should be undertaken with great care to ensure that the objectives are clearly identified and reasonable, group members have appropriate prior experience to cope with the challenges of the programme, the expedition is led by appropriately competent leaders and emergency arrangements are suitably thorough.
- 19.74 Leaders should consider value for money and the extent to which such an opportunity provides sound educational benefits and meets the school's inclusion policy. Groups are recommended to use an operator / provider that is a member of the

Expedition Providers Association (EPA) and / or holds a Learning outside The Classroom Quality Badge. [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk);  
[www.expeditionprovidersassociation.co.uk/](http://www.expeditionprovidersassociation.co.uk/)

- 19.75 Parental consent must be based on a thorough explanation of the intended programme by the provider including travel and accommodation arrangements, all planned or possible activities and associated risks.
- 19.76 Plans to take part in overseas expeditions should be notified to the Adviser for Outdoor Education via Evolve at the planning stage, before a contract is agreed with any external company.

### **Expedition companies risk management**

- 19.77 For overseas expeditions and other trips abroad with significant risk, such as those to challenging terrain, remote regions, extreme climates, or where health hazards can be expected, the relevant appropriate safety standard is British Standard BS 8848:2014. It provides a rigorous framework for assessing and managing the risks associated with such visits.
- 19.78 Expeditions using external providers are the only category of visits where the LA advises visit leaders to request detailed risk management plans from providers. Due to the extended duration and remoteness of these visits the visit leader must be fully conversant with the provider's plans for the whole expedition. This will include understanding what any emergency rescue or extraction will involve, the proximity of medical assistance/hospitals, the extent of additional support available for the provider, etc.

### **Supervision arrangements on overseas expeditions**

- 19.79 Most expedition providers allocate staff places based on the number of pupils' places, and do not always offer 2 staff places. The Local Authority recommends that there should be a minimum of two adults on all school visits. Due to the extended and remote nature of overseas expeditions, headteachers may consider the need to pay for additional staff places from school budgets to meet their obligations to provide a safe working environment for staff and pupils.
- 19.80 If the headteacher decides to approve a visit provided by and expedition company with only one member of staff attending they must consider the impact on their employee and the safeguarding of their pupils.
- 19.81 If your school is paired with another school on the expedition, the LA recommends that early contact is made between the schools (at headteacher to headteacher level). This contact should include a request for the partner school to provide a reference and evidence of DBS check for their own supervising adults. With a reciprocal offer made.

- 19.82 Due to the extended nature of such expeditions it is almost guaranteed that at some point the staff of the partner school will have to supervise pupils from your school, either to allow your employee some rest or if your employee has to attend hospital with one of your pupils etc. Therefore, the headteacher and visit leader must ensure that such other adults are dealt with in line with the establishment Safeguarding Policy as 'volunteers'.
- 19.83 Headteachers are unlikely to allow unknown adults to supervise their pupils overnight and in temporary accommodation with unconventional toilet and showering arrangements in the UK, so they shouldn't do so elsewhere. Where schools have taken this advice and made contact with partner schools, it has been seen to be very beneficial to all parties.
- 19.84 If a partner school refuses to engage in this type of relationship, it is likely that little support will be offered by the partner school's staff during the visit, therefore the headteacher and visit leaders should ensure they have sufficient competent adults to supervise their own pupils throughout the visit and to cope with emergencies.
- 19.85 Support provided by the expedition companies' staff is of a technical nature; travel, accommodation etc. Visit leaders cannot rely on expedition companies to supervise pupils except in emergency situations.

Further information is available at:  
Young Explorers Trust at: [www.theyet.org](http://www.theyet.org)  
Expedition Providers Association;  
<https://www.expeditionprovidersassociation.co.uk/>

### **Acclimatisation and altitude gain**

- 19.86 All relevant authorities are agreed that the emphasis in planning an expedition to visit or work at altitudes over 3000m must allow the whole party to gain altitude acclimatisation in a gradual manner. The provider must have a program of ascent based on expert medical advice which will significantly reduce – but not necessarily eliminate – the occurrence of Acute Mountain Sickness or other altitude-related conditions within a group.
- 19.87 Youth expedition leaders should be extremely wary of any expedition provider that ties the expedition into a strict time-scale for high altitude ascents, particularly where financial or other constraints might act against making the time available for medically appropriate ascent profiles and altitude acclimatisation as described below.

See: [www.theyet.org/wp-content/uploads/2012/09/YET-Altitude-guidelines-June-2014.pdf](http://www.theyet.org/wp-content/uploads/2012/09/YET-Altitude-guidelines-June-2014.pdf)

19.88 Further medical advice is available from [www.travelhealthconsultancy.co.uk/](http://www.travelhealthconsultancy.co.uk/)

19.89 Groups are recommended to use an operator / provider that is a member of the Expedition Providers Association and / or holds a Learning outside The Classroom Quality Badge. See [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

### **Exchange visits**

19.90 The success of a foreign exchange is largely dependent on good relationships and planning and communication with staff in the host school or youth group. In particular visit leaders should:

- check the status of the exchange programme provider to ensure they are a legitimate organisation, with links to a professional or governmental body
- seek reassurances from the host school about procedures for checking the suitability of host families – particular care should be taken if external agencies are used to recruit host families
- consider whether the individuals undergoing the exchange are suitable and able to cope with the change in culture and separation from home
- ensure all group members have easy contact with the visit leader whilst in the host country
- make young people aware of the ground rules agreed between the visit leader and the host family
- ensure home stay exchanges are well-planned, with sensible pairing arrangements
- for reciprocal home stay exchanges in the UK, liaise with the school's designated safeguarding lead to ensure to help ensure the suitability of hosting arrangements and compliance with the school's safeguarding policy.
- provide host families with details of medical or dietary needs
- ensure UK parents are asked for informed consent for any adventurous activities planned
- ensure host families abroad are aware of any restrictions on certain activities during family time

### **General guidance for all water based activities**

19.91 The local area provides rich opportunities in the natural environment for pupils to participate in a wide variety of water based activities. However, there are obvious hazards, so qualifications and codes of practice developed by the National Governing Bodies, including the Royal Life Saving Society (RLSS), Royal Yachting Association (RYA) and Canoe England, provide important safeguards for sound and safe participation.

19.92 The greatest danger in any water sport is drowning and being immersed in cold water is a major contributing factor in drowning fatalities in this country.

## **Weather forecasts**

- 19.93 Leaders should obtain a recent forecast prior to the activity, and check for changing conditions during the activity. Off shore winds are a particular hazard. Current weather forecasts should be sought before any water based activity
- 19.94 The BBC site has a special marine section [news.bbc.co.uk/weather/coast\\_and\\_sea/](http://news.bbc.co.uk/weather/coast_and_sea/)

## **Additional controls and safety factors**

- 19.95 A Personal Flotation Device (PFD) – such as a buoyancy aid or lifejacket must be worn at all times by group members and leaders. Surfing is an exception to this, see the specific surfing guidelines. The leader must know the appropriate buoyancy aid or life jacket to suit the specific activity, individual and location. All PFDs must comply with appropriate current standards, for more information see: [www.hse.gov.uk/foi/internalops/oms/2009/03/om200903app8.pdf](http://www.hse.gov.uk/foi/internalops/oms/2009/03/om200903app8.pdf). National Governing Body web sites include details of current standards. The buoyancy aid must fit, be in good condition, and be checked periodically to ensure it remains fit for purpose.
- 19.96 Helmets should be worn according to National Governing Body guidelines for the activity, and a local risk assessment.
- 19.97 All boats and boards should be in good condition, have adequate buoyancy, be suitable for the activity and the right size for the participant. It is the responsibility of the leader to check all equipment before the activity.
- 19.98 Clothing must be suitable for the conditions and spare clothing should be carried or readily available. Wet suits or dry suits may be appropriate in certain circumstances. Footwear should normally be worn for water based activities. Surfing may be an exception.
- 19.99 First aid equipment and appropriate emergency equipment must be carried or be immediately to hand (in the safety boat) at all times. All leaders of water activities must have a current first aid award appropriate to their National Governing Body qualification and to the environment they are working in.
- 19.100 Weather and water conditions can make normally safe areas unsafe. Leaders should be aware that at all levels 'normal water and weather conditions' are implied. The leader should also be aware of riptides, currents, the particular effects of wind in that area, and relevant local bye laws.
- 19.101 The leader is always responsible for the whole group. The leader should leave details of their activity with a responsible adult on shore, with instructions for action to take if the party is late.

- 19.102 Leaders need to take common sense precautions for water quality. Using recognised sites will minimise risks. Cuts should be protected with plasters. It is good practice to shower after water based activities. Should illness or 'flu like' symptoms develop immediately or after a few days, participants should consult a doctor as this could be a symptom of Weil's Disease and should be reported.
- 19.103 Individuals taking part in adventurous water based activities should normally be able to swim 50 metres in light clothing. Discretion may be exercised, in accordance with the instructor's training and experience, where special circumstances exist. Water confidence for the proposed activity may be more appropriate than the ability to swim 50 metres. In addition, trained instructors working in a controlled environment may safely introduce some non-swimmers to such activities.

### **Adventurous Activities List**

19.104 Adventurous Activities (Category B) are listed as follows:

- Air activities (other than commercial flights)
- Boating – rowing, water-skiing, jet skiing, fishing from a boat
- Bush craft, woodland activities, Forest School, Earth Education, etc.
- Camping
- Caving / mine exploration
- Climbing, abseiling, use of climbing walls, traversing walls, Tyrolean Traverse
- Coaststeering / coastal scrambling / sea level traversing
- Cycling
- Fishing
- Gorge / river walking and scrambling
- High level rope courses, including use of 'Go Ape'
- Horse riding and pony trekking
- Mountain and moorland (including Ten Tors)
- Motor sports
- Orienteering
- Paddle sports – canoe, kayak, stand up paddleboards
- Paintball
- Rafting – including improvised raft building
- Sailing, windsurfing, kitesurfing
- Shooting and archery
- Snow sports – including dry slopes
- Snorkel and sub aqua
- Surfing
- Swimming other than public pools

19.105 The following Section 4 covers the activity specific guidance.

## Section 4

### Activity Specific Guidance

#### 1.1 Air Activities

Included in this section are gliding, hang gliding, flying (except commercial flying), parachuting and other air based activities. These fall within category C, which means that details must be notified via Evolve.

The council's insurers do not provide insurance cover for air borne activities. For these reasons the council will need visit leaders to ensure the provider of the activity has public liability insurance and that participants consider their own needs in terms of accident insurance.

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#### 1.2 Boating – rowing, water-skiing, jet ski, fishing from a boat, etc

##### ***Rowing***

This activity should normally be undertaken with an established club or provider. The Form SOE5 should be used to ensure that the provider meets the standards of the Local Authority.

##### ***Water skiing and associated activities***

- Water skiing and similar activities, such as banana rides and wake boards, should only be offered to groups through registered operators, and not on private boats.
- The National Governing Body for water skiing is British Water Ski & Wakeboard (BWSW): [www.bsw.org.uk/home/](http://www.bsw.org.uk/home/)
- The BWSW runs an approval system for water ski schools, and has an established Ski Boat Driver Award (SBDA).
- Banana rides or similar are often offered as an additional activity by sailing schools.
- The school should have in place minimum standards of competence for the driver, such as the SBDA or RYA level 2 certificate, backed up by additional training. Ski boats should always have a second person, or 'spotter' to watch the skier or riders and assist the driver.

##### ***Jet skiing (personal watercraft)***

This activity should only be offered to groups through registered organisations, and **not** on private craft.

The National Governing Body for personal watercraft is the RYA. The RYA register and approve centres and schools and have an award system for instructors: [www.rya.org.uk](http://www.rya.org.uk)

## ***Sea fishing from a boat***

When a private or hired boat is being used the leader or skipper must be qualified in safety and power boat handling or equivalent, and all members of the party must wear an appropriate personal flotation device (buoyancy aid or lifejacket). The boat must be fit for purpose and carry appropriate equipment. This could include; a life raft, radio, flares, first aid kit, additional anchors, water, shelter and spare clothing. The leader must have an established emergency action plan, and it may be advisable to notify the coastguard. The boat owner / skipper should complete the form SOE5 and, in particular, hold appropriate Public Liability insurance.

For commercial boats, the skipper and the boat must both be licensed by the local authority and must comply with the Maritime and Coastguard Agency relevant Code of Practice Certification. The skipper must hold a Commercial Endorsement. The skipper should brief the participants on behaviour and safety points. Form SOE5 must be used.

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### **1.3 Bushcraft, woodland activities, Forest School, Earth Education, etc.**

These programmes cover a wide range of venues and activities. They range from simple art based sessions in school grounds to fire lighting, shelter building and the use of tools in remote woodland.

The activities will be in category A where they do not involve the use of fires or edged tools, AND take place in an accessible location, such as school grounds, or local woodland with access by vehicle. Activities will be category B where fires and / or edged tools are used, OR the activity takes place in a relatively remote environment.

#### **Activity leader competence**

Groups may buy into programmes run by external providers. The form SOE5 should be used to ensure that the provider meets the standards expected by the Local Authority.

Where Devon or Torbay leaders run the activity, the leader competence should be determined on a case by case basis, according to the activity, venue, planned programme and type of group.

Where the planned sessions do not include the use of edged tools (including but not limited to knives, axes, saws, bill hooks etc) or fires, and is in an accessible location, the leader may not require any specific additional award other than their qualification as a teacher or youth leader PLUS experience of the activity.

The use of edged tools requires the leader to have specific training and competence. The use of fires requires the leader to have experience and preferably additional training.

Sessions in remote locations (more than 30 minutes from a road or refuge) require the

leader to have a walking / trekking award appropriate to the venue, for example, Summer Moorland Leader, Summer Camping Leader.

Woodlands can present additional risks, particularly in windy conditions. Leaders should be competent to assess these risks and choose a suitable location.

## 1.4 Camping (also see mountain and moorland activities)

### Introduction

Camping is a particularly rich activity in the variety of positive educational experiences it offers. It does, however, require considerable organisation. It may involve large scale multi-day standing camps, single overnight remote backpacking expeditions, a bivouac or may be carried out in conjunction with other activities such as canoeing or cycling.

It is an activity which offers ready access to stimulating areas working in close co-operation with others with great freedom and flexibility. As such it requires purposeful planning for that freedom to be safely enjoyed by all.

### Activity leader competence: camping

Hazard level	Minimum Group instructor or leader qualification
Coastal and countryside locations and recognised commercial campsites <b>where stoves are used solely by staff</b>	Relevant experience  <b>This is a category A visit. All others below are category B visits.</b>
Coastal and countryside locations and recognised commercial campsites <b>where stoves are used by the group</b>	SWMMLTS Coastal and Countryside Camping Endorsement or a higher level award (see below)
Moorland terrain (summer conditions)	SWMMLTS Summer Moorland Camping Leader or MTE Hill and Moorland Leader with Camping Endorsement*

Moorland terrain (winter conditions)	SWMMLTS Summer Moorland Camping Leader and Winter Day Walking Leader  or Hill and Moorland Leader with moorland Camping Endorsement (MTE)*
Mountain terrain (summer conditions)	MTE Summer Mountain Leader Award
Mountain terrain (winter conditions)	MTE Winter Mountain Leader Award

\* The camping endorsement referred to here can be either the MTE Expedition Module offered as an additional bolt on to the Hill & Moorland/Lowland Leader, OR the SWMMLTS Camping Endorsement.

Full details of these awards are available at: [www.dartmoorcentres.co.uk/training.html](http://www.dartmoorcentres.co.uk/training.html)  
[www.mountain-training.org](http://www.mountain-training.org)

### **Recommended staffing ratios**

- A minimum of 1:12 is recommended.
- Lower ratios will be required for camping in mountainous terrain or winter conditions
- Mixed parties should be supervised by staff of both sexes. However, discretion may be exercised regarding the remote supervision of expeditions in which case the headteacher must give their specific approval
- Large groups may need to be supervised in smaller units

### **Additional controls and safety factors**

- The suitability and condition of equipment should be checked prior to departure and on return
- Leaders should teach basic camp skills, such as use of stoves, prior to a camp
- Access and permission arrangements need to be established
- The site should be left in the same condition that it was found, or better
- Candles should not be used to illuminate tents
- Group members may need to be shown how to plan menus and cook. A satisfactory diet is important for morale and safety
- It is the leader's responsibility to ensure a good standard of hygiene. All group members should be aware of washing areas, toilet areas, water collection points and rubbish disposal and related environmental considerations
- A set of camp rules should be considered which might include activities near tents, tidiness and noise. Hazards within the area of the camp should be identified.

## Stoves and cooking

- Stoves are potentially hazardous. Accidents have occurred from their misuse, particularly when re-fuelling
- Gas canisters should be changed well away from any flame and should not be changed in tents. If gaz-type stoves are used they should have a re-sealable valve outlet
- The Trangia meths burner unit should be re-fuelled with a purpose designed container, such as the Trangia safety fuel bottle. Do not use the plastic containers in which the meths may have been sold. The use of a second, exchange burner unit will minimise risks for the young or inexperienced individuals. The Trangia burner must be extinguished and cooled prior to refuelling
- Discuss the design, use and siting of stoves and practice their use in daylight conditions, prior to the expedition if individuals have no previous experience
- Each person should receive training in using stoves and have their competence assessed.
- Individuals should be taught how to deal with flare ups
- Mark fuel containers. Store them in the shade in a cool area
- Young people should not use stoves fuelled by petrol
- Cooking should be done outside and away from tents
- Standing camps will normally have separate kitchen tents

### Recommended stoves for light-weight camping and expeditions are:

- Trangia-type methylated spirit stoves, with care needed on refuelling and careful storage of fuel
- Gas stoves with a re-sealable valve outlet using propane and butane gas mix
- Gas adaptors are available for Trangia stoves

### Training opportunities and additional information

Mountain Leader Training England [www.mountain-training.org](http://www.mountain-training.org)  
South West Mountain and Moorland Leader Training Scheme Syllabus  
[www.dartmoorcentres.co.uk/training.html](http://www.dartmoorcentres.co.uk/training.html) and [www.swmmlts.org/](http://www.swmmlts.org/)  
Hillwalking: The Official Handbook of the Mountain Leader and Walking Group Leader Schemes.

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## 1.5 Caving and Mine exploration

### Introduction

Caving is the exploration of natural and sometimes mined underground systems and a primary motive should be the desire to learn about such places. Devon has a variety of cave systems particularly centred around the limestone of the Buckfastleigh area. The caves of the Mendip Hills provide a nearby extension to these opportunities, for those qualified to lead groups in this area. Groups must abide by current access agreements.

Groups may buy into programmes run by external providers. Form SOE5 should be used to ensure that the provider meets the standards expected by the Local Authority.

### **Activity leader competence: caving**

All leaders of caving activities MUST hold the appropriate NGB award for the cave concerned. The award must be added to the Evolve system and attached to the Activity Leader Form (ALF) for the Visit.

### **Training opportunities and additional information**

The National Governing Body for caving is the British Caving Association: [british-caving.org.uk/](http://british-caving.org.uk/). The Local Cave and Mine Leader Award Assessment Handbook provides detailed background to the scheme and is available from the BCA website.

### **Recommended staffing ratios**

- For caves with no technical difficulty and no wet sections one qualified instructor who holds a minimum of the LCMLA Level 1 may lead groups of up to 12 pupils. A second responsible adult, who has previous experience of the cave, should accompany the group
- For more technical caves the number in the party should not exceed a ratio of 1 qualified leader to 6 pupils. Each party should have an assistant or second member of staff
- The minimum party size should be four. Group size should be small both for mobility underground and so that each person is able to be an integral member of the group

### **Additional controls and safety factors**

- The leader should have previous experience of the caves that groups are taken in to and associated access and accident procedures
- Mines present particular hazards which require more detailed background information prior to any visit, in terms of false floors, stacked waste rock, unsafe timbering, deep water and structural instability. The possibility of poisonous gases and discarded materials should also be considered. Radon hazards in mines in the West Country are particularly significant. Visits to mines must be considered in the light of currently available radon readings
- The leader should be familiar with current information related to radon hazards in mines or caves which are used
- Leaders should set examples and impress upon their parties the need for conservation in caves. The principle of minimum impact, when to avoid caves, care of stalagmites, removal of any litter and care for the local flora and fauna should form part of an all-round education in cave conservation
- Each caver should have adequate warm clothing with protective outer garment, a helmet conforming to British Standard with 'Y' chin strap and lamp bracket, an efficient head lamp and suitable footwear such as wellingtons or stout boots without

- hook lacings
  - Group equipment should include emergency food, spare lighting, a first aid kit, knife and whistle. A group shelter sufficient for all members of the group should be carried, or individual bivi-bags.
  - The group leader should be sensitive to the physical and psychological condition of all group members and have an established system of communication within the group
  - Information about the proposed visit should be left with a responsible adult who will be clear about emergency procedures in the event of the group not returning. An indication of the groups' presence in the cave should be left at the cave entrance
  - Preparation may need to include surface training and should include a briefing and equipment checks
  - A weather forecast should be obtained for any cave in which there is any danger of flooding
  - The group leader should identify any medical conditions within the group prior to the activity
- 

## 1.6 Climbing, abseiling, use of climbing walls, etc

### Introduction

This activity covers rock climbing, abseiling, the use of climbing and traversing walls, and Tyrolean traverses.

### *Climbing*

#### Activity leader competence

Hazard level	Group instructor or leader
Bouldering at indoor venues or natural crags	Relevant experience
Climbing walls – School and community climbing walls	Devon County Council Climbing Wall Supervisor* Or MTE Climbing Wall Instructor (formerly known as Climbing Wall Award)
Climbing walls - commercial or privately run	Devon County Council Climbing Wall Supervisor* Or MTE Climbing Wall Instructor (formerly known as Climbing Wall Award)

Single pitch crags less than 30 minutes from road or refuge - non-tidal	MTE Rock Climbing Instructor (formerly known as Single Pitch Award)
Multi-pitch climbing	MTE Mountain Instructor Award
Single or multi-pitch climbing more than 30 minutes from road or refuge	MTE Climbing Wall Instructor with MTE Summer Mountain Leader or SWMMLTS Summer Moorland Leader Or MTE Mountain Instructor Award
Winter climbing (mixed routes/ice climbing)	MTE Mountain Instructor Certificate
Tyrolean traverses  These can be improvised, or semi-permanent. They can be between trees, over rivers and across gorges	Single Pitch Award <b>and</b> relevant training in the use of Tyrolean set ups Or MTE Mountain Instructor's Award

\*Devon County Council Climbing Wall Supervisor Award is no longer offered to new entrants following the introduction of the MTE Climbing Wall Award, later superseded by the MTE Climbing Wall Instructor

### ***Rock Climbing and Abseiling***

#### **Recommended staffing ratio for use of natural crags**

- This will depend on the level and purpose of the session and the experience of the participants
- An introductory session will be difficult to manage if the ratio exceeds 1:8
- On multi-pitch climbs, 1:2 is a minimum recommended ratio

#### **Additional controls and safety factors for natural crags**

- Rock climbing with young people should be introduced in easy stages, allowing for an early appreciation of basic skills and procedures
- Where appropriate, beginners should experience the effects of holding another climber on a rope and of being held themselves
- A safety rope should be used when abseiling
- Approved protective helmets should be worn

- The use of equipment should be monitored each session and throughout the year
- There should be a systematic approach to checking and maintaining equipment, informed by manufacturers' guidance. Records should be kept of important safety checks, and any equipment showing undue signs of wear should be discarded.
- All climbing equipment should be fit for purpose and carry the CE standard

### ***Climbing walls***

Recreational climbing on walls has become an activity in its own right. Climbing walls also complement opportunities to climb on natural crags and boulders and offer new opportunities for teaching and practice. They may incorporate artificial structures adapted for climbing

### **Additional controls and safety factors on climbing walls**

- Other than low walls only used for traversing, climbing walls should only be used under the supervision of an individual with the appropriate qualification; Devon Climbing Wall Supervisor\* or MTE Climbing Wall Instructor depending on the complexity of the wall and local conditions of use
- Instructors should follow recognised practice and conform to conditions of use at individual climbing walls, including use of helmets and other equipment where recommended
- There should be a progressive programme of training, allowing pupils to develop and master the skills of belaying in low risk situations, before they take greater responsibility for other pupils when peer or team belaying on the wall
- A qualified member of staff supervising the group must be able to intervene quickly and effectively if they need to. Young people with less experience in peer belaying will need closer supervision
- Belay methods need to be appropriate to the group's level of experience. For most pupils a second belayer 'tailing' the rope (holding the rope and acting as an alert back up to the belayer) is essential
- Equipment should be of the same standard as for other forms of climbing
- On council property the design of artificial walls must be approved. The headteacher of the establishment should ensure that any wall fixtures, particularly anchor points, are inspected regularly and the inspections recorded. A prominent notice should be displayed to the effect of, 'Do not use this wall without permission'.

### **Inspection/Testing requirements for Artificial Climbing Structures (ACS)**

The inspection/testing requirements for ACS can be found at:

[www.thenbs.com/PublicationIndex/documents/details?Pub=BSI&DocID=316241](http://www.thenbs.com/PublicationIndex/documents/details?Pub=BSI&DocID=316241)

The standards identify 3 levels of inspection and it is recommended that a system of inspections is undertaken on the following basis:

- **Routine Visual:** by teachers or climbing wall supervisor's each time the wall is used

(usually daily, not documented). If any defects are apparent this may result in not using that part of the wall until the defect is rectified. A verbal or written report should be made to the manager of the wall or the headteacher of Physical Education

- **Operational** (every 1-3 months dependent on usage by wall managers - documented) noting any defects, loose holds or potential weak points within belay fixtures
- **Annual Formal Inspection ('structural')** A site visit should be undertaken by a competent inspector to assess the integrity of belay and other permanent fixtures, including the integrity of the wall. This should be carried out at least once every year or when any concerns are apparent or when significant amendments to the wall are proposed

Whilst the frequency of the main formal inspection depends upon the manufacturer's recommendations, all the manufacturers (including all members of the Climbing Wall Manufacturer's Association - CWMA) require that a formal ('structural') inspection is carried out annually. The CWMA ([www.cwma.co.uk](http://www.cwma.co.uk)) can be contacted by schools to arrange competent inspectors to carry out annual formal inspections. It is worth noting that for newer climbing walls there may already be an inspection arrangement in place with the firm responsible for design and construction.

### **Community use of climbing walls**

- Participants should be informed about the risks of climbing and should confirm that they are aware of and consent to those risks
- Suitable arrangements must be in place to supervise community use of the climbing wall where young people under the age of 18 take part

### ***Traversing walls***

Traversing walls encourage balance, co-ordination and movement in curriculum time or as part of lunch-time and break time activities. Using some or all of the holds young people may set themselves challenges appropriate to their own ability. As the name implies, traversing walls are designed to allow movement along, rather than up, the wall. A traversing wall does not need specialist climbing equipment or specially qualified supervisors - it provides 'low level' climbing.

- Follow manufacturer's guidance for fitting holds. Extra holes may be drilled and sleeves fitted, to allow swapping and movement of holds
- Provide holds of different colours, sizes, shapes and locations
- Risk assess the location of the wall:
  - consider the surface at the foot of the wall and ensure there are no obstacles such as drains or kerb edges which young people are likely to step down onto.
  - consider the location in terms of any immediately adjacent activities
- A protective surface should generally be considered where the highest footholds are

more than 600mm off the ground - protective surfacing is not a legal requirement but should be considered as part of your risk assessment for the wall and its use

- Consider ease of supervision and observation for things like lunchtime use.
- Check the holds on a regular basis to see if any have become loose, and tighten where necessary. Ask group members to report any loose holds
- Young people should be informed about good practice (and may be able to draw up their own code of practice) including:
  - giving people on the wall time and space to move on
  - don't stand immediately behind or directly below someone who is on the wall
  - be considerate towards other people on the wall
  - use sensible footwear

### ***Tyrolean Traverses***

These can be improvised or fixed. They can be between trees, over rivers and across gorges.

The leader / instructor should be suitably competent to rig and supervise the activity using appropriate PPE and recognised systems and equipment. The minimum qualification is MTE Rock Climbing Instructor **and** additional training and sign off from a suitably competent technical adviser, or MTE Mountain Instructor Award. Where the traverse crosses water, the leader should thoroughly risk assess the group's safety at the water margins and have appropriate staff on each bank to supervise the group effectively. Inexperienced leaders should not attempt to improvise Tyrolean traverses or 'zip wires'. Considerable loads and forces are present in Tyrolean traverses and serious injury can be caused by inappropriate set ups.

### **Training opportunities and additional information**

- The Adventure Activities Licensing Service has guidance on peer belaying; [www.hse.gov.uk/aala/index.htm](http://www.hse.gov.uk/aala/index.htm)
  - Guidance on selecting, using and caring for equipment is in the British mountaineering Council (BMC) pamphlets on equipment at: [www.thebmc.co.uk](http://www.thebmc.co.uk)
  - The leader should have a clear understanding of environmental and access issues in general and those relating to using individual areas. Guide books, the BMC pamphlet *Tread Lightly* and the Countryside Code provide background information. See [www.thebmc.co.uk](http://www.thebmc.co.uk)
  - See BMC club guidance notes for information on community use of climbing walls and other club based information: [www.thebmc.co.uk](http://www.thebmc.co.uk)
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## 1.7 Coasteering, coastal scrambling, adventure swimming, etc

### Coasteering

Coasteering is an Adventurous Activity (category B) and involves traversing along a stretch of intertidal zone, often as part of an organised group activity. Participants travel across rocks and through water, using a variety of techniques including climbing, swimming and jumping into water. Coasteering participants must wear appropriate clothing and equipment while undertaking coasteering activities.

It should be noted that coasteering can be offered under other names, such as Adventure Swimming, Coastal Exploration, Sea Level Traversing etc. Leaders should check carefully what the activity includes when using an external provider.

In the absence of a National Governing Body establishments are encouraged to seek providers that are members of the National Coasteering Charter (NCC); [www.nationalcoasteeringcharter.org.uk/](http://www.nationalcoasteeringcharter.org.uk/)

The provider must hold an AALA licence AND complete the form SOE5 or hold a Learning Outside the Classroom quality badge.

Where the activity will be led by a Devon or Torbay leader, the following will apply:

- The leader must hold a 'certificate of competence' issued for the site to be used by an appropriate technical advisor. This must be added to Evolve and to the visit form ALF
- The technical advisor must be agreed with the Local Authority
- The activity should be run in line with the NCC guidance
- Clothing and equipment should be carefully considered. A buoyancy aid should be worn if there is a likelihood of being in the water and wet suits may be required
- Helmets should be worn
- The group leader needs to be aware of local conditions, including tides and currents
- Access and exit points need to be considered. Emergency procedures should include alternative exits and escape routes
- The group leader should carry out a visit to the site, to assess risks and consider the suitability of the site before using it with group members
- There should be clearly identified cut off points, for temperature, and tide height, beyond which the activity does not take place
- Leaders should exercise caution before allowing participants to jump into the water. It may be appropriate for the leader to test the jump and the exit point
- Leaders should be aware of the effects of cold water and that someone may panic and ensure appropriate safeguards are in place
- See also page 52 on other water based activities

## 1.8 Cycling

### Introduction

The local area has an extensive road network and a wide range of off-road cycle routes and bridleways. Cycling provides great opportunities for independent journeying. An awareness of traffic hazards on all roads and how to avoid such hazards must, however, be a priority. Environmental damage and erosion is a major concern, particularly on Dartmoor and should be kept to a minimum. Respect should always be shown to other users of the countryside.

Where cycling takes place on public roads, or on non-technical cycle trails, such as the Tarka Trail, Granite Way or the “Discovery” routes at Haldon Forest, the activity will be category A. Technical trails and trails in remote country will be category B.

### Activity leader competence: cycling

There are a number of national awards for cycling, and leaders are strongly encouraged to obtain an appropriate national award. Where a leader does not hold an award, they must be able to demonstrate appropriate, recent and relevant experience in cycling in the environment to be used.

A remote country walking award may also be required if the cycling is to take place more than 30 minutes walk from a road or habitation. In this case, the award must be added to the Evolve system, and attached to the Activity Leader Form (ALF) for the Visit.

Leaders should hold a current first aid certificate.

### Training opportunities and additional information

[www.britishcycling.org.uk/mtbleadership](http://www.britishcycling.org.uk/mtbleadership)  
[www.cyclinguk.org/courses-and-training/faq/terrain-definitions-for-mtb-courses/mountainbikeinstructor.com/courses-2/mountain-bike-leader-tutor-award/](http://www.cyclinguk.org/courses-and-training/faq/terrain-definitions-for-mtb-courses/mountainbikeinstructor.com/courses-2/mountain-bike-leader-tutor-award/)

Details of current awards in cycling leadership can be found on the Adventure Activities Licensing Service web site [www.aals.org.uk](http://www.aals.org.uk)

### Additional information

Devon County Council provides one-day cycle training courses for pupils and adults: [www.traveldevon.info/cycle/cycle-training/](http://www.traveldevon.info/cycle/cycle-training/)

### Recommended minimum staffing ratios

- 1:10. This may need to be improved, informed by risk assessment and with particular regard to terrain, hazards, group age and experience

- There should be an assistant leader if group members have limited previous experience of riding in groups or on roads

### **Additional controls and safety factors**

- Cycling on roads presents additional risks. The danger from traffic is an increasing problem, even on quiet country lanes. Leaders are encouraged to use dedicated cycle ways wherever possible and may consider transporting bikes to cycle way venues, or hiring on site
- Reflective materials on clothes or cycles greatly increase the visibility other road users have of cyclists and are strongly recommended
- Helmets should be worn when cycling on and off road
- Groups should practice in a safe area to ensure they can control their bikes properly.
- Leaders should ensure group members understand correct behaviour and are aware of dangers en route
- Uncontrolled descents and blind corners present particular hazards on even the most minor roads
- Cyclists should be proficient and have appropriate knowledge of the Highway Code
- Access may need to be negotiated when cycling off roads. Cyclists have a right of way along public bridleways but not along public paths
- Cycle in single file on roads
- Particular care should be taken on unstable or wet surfaces
- Leaders should have experience of both cycling and basic cycle maintenance
- Cycles should be checked for roadworthiness, particularly brakes, tyres and lights

## **1.9 Fishing/Angling from the water margin**

### **Sea fishing from a boat is detailed in the section ‘Boating’ above**

Leaders should exercise supervision appropriate to the expertise and self-reliance of the participants and with regard to prevailing conditions. They should brief group members about potential hazards such as crumbling rocks, tides, shingle, unexpected large waves, slippery rocks, casting dangers and the dangers of being washed into the sea, bearing in mind a safety margin.

The booklet *Group Safety at Water Margins* is recommended reading, and can be found on [Evolve/Resources/Guidance](#).

### **Activity leader competence: fishing**

All leaders should be competent to assess the risks of the proposed activity, based on the factors listed below. All leaders should have relevant fishing experience and be proficient in first aid, life-saving and rescue as appropriate recognised fishing areas should normally be used.

## **Recommended minimum staffing ratios**

- 1:10 is recommended inland/rivers /lakes/canals
- 1:6 is recommended on the coast/tidal estuaries
- Many circumstances will require an improved staffing ratio, informed by risk assessment.

## **Additional controls and safety factors**

- Group leaders are encouraged to undertake a training course recognised by the Angling Trust or similar organisation
- Personal clothing and equipment should be appropriate to the environment and weather conditions. Particular attention should be paid to adequate footwear
- A lifejacket or buoyancy aid should be worn when fishing from rocks
- A rescue rope or line throwing buoy should be available when fishing from rocks and the leader should be competent to use it
- Leaders should consult tide tables, if applicable, and be familiar with prevailing conditions
- Leaders should have local knowledge of the water and access arrangements and be aware of seasonal limitations
- Elementary weather signs such as wind strength, wind directions, cloud and formations should be monitored as the weather affects tidal conditions
- Leaders should be proficient in life-saving and resuscitation and aware of the causes and treatment of hypothermia
- There should be a competent first aider present, who has the ability to instruct others in how to remove fish-hooks from flesh. If this happens an anti-tetanus injection may be needed
- Wading in fast or unfamiliar waters can be dangerous. Only wade when the bottom can be seen and risks have been carefully assessed
- The leader should carry a whistle for recalling group members
- Group leaders should brief participants about appropriate environmental considerations and conservation practices, including a 'catch and return' policy. Anglers should be aware of other people when using hooks and weights
- Leave details of your programme with an emergency contact who can act if you are overdue

## **Training opportunities and additional information**

Details of the coach licensing scheme of the Angling Trust can be found at:  
[www.anglingtrust.net](http://www.anglingtrust.net)

Details of the RLSS National Water Safety Management Programme can be found at:  
[rlss.org.uk/professional-qualifications/nwsmp/](http://rlss.org.uk/professional-qualifications/nwsmp/)

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## 1.10 Gorge Walking

Gorge Walking is a combined water and rock activity where hazards associated with a rock environment may at times combine, or alternate with, those of a water environment. It should be noted that other names can be used for the activities, such as canyoning, ghyll walks, river walks, adventure swimming, river running and activities at water margins.

Leaders should be aware of the specific content of a programme or proposed activity and use the table below, together with a specific risk assessment, to guide their planning and level of required leader competence. This activity can be run as a 'wet' or a 'dry' activity, depending on the intentions at the outset. Group Leaders should have a clear understanding of the activity objectives and base their risk assessment on that objective.

Gorge walking - non-technical within the South West	Appropriate life-saving and rescue skills <b>and</b> Summer Moorland Leader Award or equivalent
Gorge walking - technical gorges involving the skills and techniques of a climber and the use of climbing equipment	Appropriate life-saving and rescue skills <b>and</b> MTE Rock Climbing Instructor <b>and</b> Summer Moorland Leader Award or equivalent for sites more than 30 minutes from a road or refuge

Groups undertaking gorge walking and similar activities may use an external provider, ensuring that the provider holds an AALA licence AND completes the form SOE5 or holds a Learning Outside The Classroom quality badge. Where the activity will be led by a Devon or Torbay leader, the following will apply:

- The leader must be able to demonstrate their competence for the site used based on an assessment of the risks involved at the site. This may be a combination of awards as noted above, or they may hold a 'certificate of competence' issued for the site to be used by an appropriate technical advisor. This must be added to Evolve, and to the visit form ALF
- The technical advisor must be agreed with the Local Authority
- The activity should be run in line with the AALA guidance
- Clothing and equipment should be carefully considered. A buoyancy aid should be worn if there is a likelihood of being in the water and wet suits may be required
- Helmets should be worn
- The group leader needs to be aware of local conditions, including dam releases, river levels and currents
- Access and exit points need to be considered. Emergency procedures should

- include alternative exits and escape routes
- The group leader should carry out a visit to the site to assess risks and consider the suitability of the site before using it with group members
- There should be clearly identified cut off points for temperature and water levels beyond which the activity does not take place
- Leaders should exercise caution before allowing participants to jump into the water. It may be appropriate for the leader to test the jump and the exit point
- Leaders should be aware of the effects of cold water, and that someone may panic, and ensure appropriate safeguards are in place.
- See also pages 52 and 62 on other water based activities

## **Training opportunities and additional information**

There is no specific National Governing Body for this type of activity. Most of these activities will need a combination of skills and awards Group leaders are recommended to be familiar with and adhere to the guidance in the document 'Combined Water Rock Activities, a Safety Checklist' available from the AALA website [www.hse.gov.uk/aala/](http://www.hse.gov.uk/aala/)

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### **1.11 High Level Rope courses**

#### **Introduction**

Ropes courses are an established activity which are by their nature a fun and challenging activity for young people and which can form a very valuable part of an outdoor education programme. There are an increasing number of these courses in the South West which are being used by a range of Devon County Council and Torbay Council groups.

The European Ropes Course Association (ERCA) is the leading body in Rope Course Inspection. When using an external provider of 'ropes courses', visit leaders should ensure the provider complies with a formal accreditation scheme.

Competence of staff (instructors) to run the activities is clearly important to ensuring both the success of the activity and also its safety. Until recently the majority of instructors have been trained in-house by the installer of the course or the operator of the course.

The view of the Adventure Activities Licensing Service has been that the most appropriate technical advisors for training and assessing the competence of instructors will have appropriate experience of ropes courses and hold one of the following NGB awards – Mountain Instructor Award (MIA), Mountain Instructor Certificate (MIC), a British Mountain Guide (BMG) Carnet or the Cave Instructor Certificate (CIC) or be an ERCA Trainer.

Most groups will use an external provider to supervise / instruct a ropes course session. The form SOE5, or an LoTC Quality badge, should be used to confirm the provider meets the standards of the Local Authority. See page 116.

Where the activity is led by a Devon or Torbay leader, the following will apply:

- The leader must be able to demonstrate their competence for the site used based on an assessment of the risks involved at the site. This will include a 'certificate of competence' issued for the site to be used by an appropriate technical advisor. This must be added to Evolve and to the visit form ALF
- The technical advisor must be agreed with the Local Authority, following AALA/ERCA guidelines
- The activity should be run in line with the AALA and / or ERCA guidance. For more information, visit [www.erca.cc](http://www.erca.cc) or [www.aals.org.uk](http://www.aals.org.uk)

### **Use of the Go Ape facility at Haldon Forest, Exeter**

**Additional staff supervision is required at Go Ape due to the possibility of 'double unclipping' on the safety system. All establishment staff and volunteers should be personally comfortable working at height.**

Please refer to detailed guidance on the use of Go Ape by schools and other establishments on the Evolve site, go to /resources/guidance, policies, documents/ropes courses.

## **1.12 Horse riding and pony trekking**

### **Activity leader competence: horse riding and pony trekking**

<b>Hazard level</b>	<b>Group instructor or leader</b>
Riding school	Establishment is recognised by the British Horse Society (BHS)
Trekking - countryside or moorland fringe	Established trekking centre with local authority licence and staff with relevant experience
Trekking – more than 30 minutes walk from road or refuge	Establishment is licensed with the Adventure Activity Licensing Authority

Visit leaders planning to use riding or trekking centres should ensure that the centre

has a current licence issued by the local authority which requires a building inspection, veterinary inspection and evidence of insurance.

### **Additional controls and safety factors**

#### **Riding**

- Recognition by the Association of British Riding Schools (ABRS) or BHS provides a guide to the standards to be expected of riding schools when instruction is being considered. In addition, a number of centres have particular experience and qualifications connected to work with special needs groups.
- For all groups, suitable clothing must be worn including well-fitting headgear to current BSI standard and footwear with low, hard heels
- The numbers of riders per escort must not exceed safe limits, six is reasonable

#### **Pony trekking**

- This activity allows access to a great deal of hilly and scenic terrain. It may involve some time in the saddle and preliminary riding instruction is advisable
- Weather conditions and terrain may make protective clothing necessary
- Small groups are desirable for pony trekking. They should be accompanied by two adults who are experienced in instructing, leading and assisting treks, have an elementary knowledge of first aid and local knowledge of riding routes

#### **Training opportunities and additional information:**

Approval by one of the following organisations ensures the establishment has been inspected and found to meet certain minimum standards:

- the Association of British Riding Schools: [www.abrs-info.org/](http://www.abrs-info.org/)
- British Horse Society: [www.bhs.org.uk](http://www.bhs.org.uk)
- Ponies Association (UK): [www.poniesuk.org](http://www.poniesuk.org)
- Riding for the Disabled Association: <http://www.rda.org.uk/>

The BHS Stage II provides an indication of minimum competence but is not a requirement for an escort.

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**1.13 Mountain and moorland activities** (also see Coastal and Countryside activities on pages 38 and 62)

**Activity leader competence: walking** (also see camping)

<b>Hazard level</b>	<b>Group instructor or leader</b>
Moorland in summer conditions more than 30 minutes from road or refuge	SWMMLTS Summer Moorland Walking Leader or MTE Hill and Moorland Leader (formerly known as Walking Group Leader)
Moorland in winter conditions	SWMMLTS Winter Moorland Walking Leader or Hill and Moorland Leader (MTE) (formerly known as Walking Group Leader)
Mountain terrain in summer conditions- including scrambling	MTE Mountain Leader Award - Summer
Mountain terrain in winter conditions	MTE Mountain Leader Award - winter
Mountain terrain abroad	Mountain Leader Award (equivalent to UK Terrain) or International Mountain Leader Award

Full details of these awards from:

[www.dartmoorcentres.co.uk/training.html](http://www.dartmoorcentres.co.uk/training.html)  
<http://swmmlts.org/>  
[www.mountain-training.org](http://www.mountain-training.org)

Summer moorland conditions are typically fair weather days but may have cold winds, rain and low temperatures which have not been forecast and can be a hazard, so the leader and the party should be prepared for this. Winter moorland conditions exist when there is snow and or ice under foot or forecast irrespective of the time of the year and also includes a combination of rain, cold winds and low temperatures.

All moorland leaders must have done a minimum of sixteen hours formal first aid training in the last three years, ideally with an outdoor bias.

## **Recommended staffing ratios**

- One qualified leader to 15 group members is recommended as a minimum
- It is preferable to have two adults accompanying a group
- In a mountain environment an improved ratio is required based on risk assessment.
- Large parties are difficult to manage
- The minimum recommended group size is four

## **Additional controls and safety factors**

The responsibilities and leadership skills needed for a group on the moors or in the mountains call for a broad base of knowledge and experience. This is particularly the case where there are severe weather conditions, navigational difficulties or where an unexpected incident occurs.

- The leader needs to be aware of symptoms of hypothermia and hyperthermia and how they may be prevented or dealt with
- The leader should be familiar with accident procedures, individual and group equipment needs and the hazards involved in crossing swollen streams or rivers
- The speed of the group should be governed by the slowest member
- The minimum equipment the leader will generally need is; waterproofs, map and compass, whistle, torch, survival bag, first aid kit, hat and gloves, spare clothing and emergency rations and a mobile phone. Many of these should also be carried by group members, depending on the group and the route being taken
- The mountain and moorland environment in winter conditions should not be underestimated. Fitness and stamina is needed as well as sound judgement and navigational ability
- The leader should get a local weather forecast before departure
- The leader should leave details of the route the group intends to take at base or with a responsible adult, together with instructions of the action to take if the party is late
- The leader needs to be aware of access and conservation issues in the area they are visiting

## **Ten Tors**

The required minimum level of approval for Ten Tors Team Managers is the Summer Moorland Camping Leader Award. However, staff leading Ten Tors groups in winter conditions will need either:

- Summer Moorland Camping Leader Award plus the Winter Moorland Walking Leader Award
- Hill and Moorland Award plus expedition module (or SWMML Summer Camping)
- Summer Mountain Leader Award.

Team Managers should refer to 'Ten Tors Training Responsibility and Competence 2017, [www.tentors.org.uk](http://www.tentors.org.uk)

Particular attention should be paid to how prepared groups are which will be supervised remotely even in reasonable weather conditions (see page 34 on remote supervision).

Managers must attend the Ten Tors briefing as required by the organisers. All members of staff should be aware of current good practice in terms of leadership, hypothermia and hyperthermia, water hazards, access, clothing and equipment. Managers should be aware of information about Ten Tors requirements for managers, available at [www.tentors.org.uk](http://www.tentors.org.uk)

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## 1.14 Motor Sports

Motor sports should be only offered to groups at established venues where the operator can show compliance with HSE requirements and carries full public liability insurance. The form SOE5 should always be used to ensure the provider meets the standards required by the Local Authority.

Providers may ask visit leaders or participants to sign **an indemnity or waiver form. These forms are NOT acceptable.** Any such waiver or disclaimer must be struck off the forms. Further advice about insurance can be sought from the DCC Insurance section: Emily Wilkins, County Insurance Officer on 01392 382292 or Torbay Insurance on 01803 207174.

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## 1.15 Orienteering

### Introduction

Orienteering is a sport which blends navigational and physical skills. It is not especially hazardous but it is an all year-round activity and accidents may occur in places where medical attention is not immediately available. In the nature of orienteering, young people will typically be supervised on a remote basis and this should be considered in the risk assessment. Group leaders taking parties to organised events should have had first-hand experience of the sport.

### Activity leader competence: orienteering

Leaders should have relevant experience, and are encouraged to hold a British Orienteering Federation award.

### Training and coaching opportunities and additional information

- British Orienteering Federation: [www.britishorienteering.org.uk](http://www.britishorienteering.org.uk)
- Find details of local club events and permanent orienteering courses in Devon at: [www.devonorienteering.co.uk/](http://www.devonorienteering.co.uk/)

## Recommended staffing ratios

- An organised British Orienteering event where additional supervision is on hand, will need different support to that which is needed to manage a training session with no outside assistance
- For training and teaching sessions a minimum ratio of 1:15 is recommended. For most groups this ratio will need to be improved depending on the complexity of the terrain, the experience and age of the group and the extent of boundary collecting features
- At an organised event a minimum ratio of 1:15 is recommended for participating groups - allowing adequate preparation for competitors the group leader is responsible for
- Experienced parents and other adult helpers may help with supervision

## Additional controls and safety factors

- Full leg and arm cover should be worn
- Clothing should give adequate protection against cold, wind and rain especially in exposed locations
- A whistle should be carried and individuals instructed in its use and misuse
- Orienteering skills should be taught in clear and easy stages with adequate opportunity for individuals to get to know the map.
- Courses should encourage a sense of success not failure and should involve safety strategies for novices to limit the effects of navigational errors
- Out of bounds areas should be clearly defined and reference made to any particular local hazards
- Leaders should stress the importance of reporting to the finish and of handing in control cards for all competitors whether they complete a course or retire
- A time limit may need to be set which individuals must return to base by allowing a margin of time if an initial search is needed
- Instructions should be given to novices about what to do if they become lost
- For activities, perhaps using permanent courses, for novices or young participants it is appropriate for young people to work in pairs or threes
- Competitive orienteering generally involves individuals travelling alone through the woodland, countryside or, less commonly, urban event area. The visit leader should be aware of the slight risk of interference from the public

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## 1.16 Paddlesports, including canoeing and kayaking, stand-up paddleboards

### Activity leader competence: *canoeing and kayaking*

British Canoeing (formerly British Canoe Union) has recently revised the Coaching Scheme. New awards have different limitations and terms of reference. See [www.bcu.org.uk](http://www.bcu.org.uk) for latest details.

British Canoeing Awards are specific to type of water, either inland, sea or surf and to type of boat -either kayak or canoe. Leaders are expected to operate within the terms of reference of their awards. Groups often use an established external provider for this activity. Form SOE5 or the Learning Outside the Classroom Badge should be used to ensure the provider meets the standards required by the Local Authority.

Where a leader from Devon or Torbay leads the activity, the following will apply:

- The leader must hold an appropriate British Canoeing award and work within the terms of reference of that award
- The leader must have up to date first aid and be currently registered with British Canoeing
- The activity must be notified via Evolve, with the leader's current award added to the system

### **Ratios:**

- British Canoeing ratios represent normal practice for teaching purposes
- An appropriate technical adviser may allow these ratios to be exceeded
- The use of suitably qualified assistants can permit larger groups, although over large groups should be avoided
- Remote locations will need more stringent procedures

### **Additional controls and safety factors**

- All participants should wear a personal flotation device (PFD) suited to their ability and the location. The PFD should be properly fitting and tested to ensure it remains fit for purpose
- Helmets may be worn according to British Canoeing guidelines and a local specific risk assessment

### **Training opportunities and additional information**

The National Governing Body for all paddlesport activity is British Canoeing:  
[www.bcu.org.uk](http://www.bcu.org.uk)

Haven Banks Outdoor Education Centre is a recognised British Canoeing centre in Exeter and provides a range of training courses: [www.haven-banks.co.uk](http://www.haven-banks.co.uk) or phone: 01392 400150

### **Stand Up Paddleboards (SUP)**

This is a relatively new activity involving the use of large, stable boards similar to windsurf or surf boards, propelled by one long paddle. This activity falls within the scope of the Adventure Activity Regulations. Groups should use form SOE5 or the Learning outside The Classroom badge to ensure the provider meets the requirements of the Local Authority.

## Activity Leader competence

Where the activity is led by Devon or Torbay staff, the following will apply:

- Leaders should hold a SUP instructor award OR another appropriate water sports instructor award, (for example a British Canoe or RYA instructor award) plus craft specific training

The British Stand Up Paddleboard Association: [www.bsupa.org.uk](http://www.bsupa.org.uk)

British Canoeing offer an award for SUP instructors;  
[www.britishcanoeing.org.uk/coaching-leadership/new-for-2019](http://www.britishcanoeing.org.uk/coaching-leadership/new-for-2019)

- Risk assessments must take into account the venue particularly with regard to emergency procedures and rescue
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### 1.17 Paintballing

A number of schools, colleges and youth groups take part in paintballing particularly as a recreational activity. The following guidance is offered to headteachers, managers and prospective visit leaders.

- Be clear about your objectives for each particular group which may participate
- There is limited merit in helping to ensure an activity is safe if no clear and appropriate rationale for the programme has previously been established
- Use providers who can demonstrate they are accredited by a recognised national organisation which has expertise in this area and sets minimum standards to which its members conform. Two such organisations are: The UKPBA (UK Paintball Association) <http://www.ukpba.org.uk/> has an accreditation scheme for sites, and The UKPSF (UK Paintball Sports Federation) [www.ukpsf.com](http://www.ukpsf.com) has an accreditation scheme that includes site inspection.
- The provider must ALWAYS complete the form SOE5 and return it to the visit leader before a booking is made
- The minimum age accepted by different providers varies considerably. It is clearly important to comply with the age restrictions, and consider offering alternative activities to younger pupils
- Participants should receive a clear briefing from the provider regarding safety procedures
- Protective clothing and equipment should be provided, to protect areas of the headteacher, neck and body including eyes, ears, face, throat and hands. Chest protection should be available to and worn by females
- The group leader should be confident that participants will abide by the rules and work within the safety briefing prior to starting any game
- Parents and participants should be aware that bruising can result from pellets fired

during a game. This should be made known on the information sheet which is distributed to parents and prospective participants. Signed parental consent should always be obtained for paintball activities including the acknowledgement of the level of risk from bruising etc.

- Providers may ask visit leaders or participants to sign an indemnity form. These forms are NOT acceptable. Any such waiver or disclaimer must be struck off the forms. Further advice about insurance can be sought from the DCC Insurance section: Emily Wilkins, County Insurance Officer on 01392 382292 or Torbay Insurance on 01803 207174.

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### **1.18 Rafting, including improvised raft building**

Raft building can be a worthwhile, realistic team exercise for groups of any age. Rafts can be made from barrels and planks, windsurf boards, open canoes strapped together, and a variety of other materials. There is no National Governing Body for this activity.

#### **Activity leader competence: improvised raft building**

Raft building activities are often run at an established water sports centre. The form SOE5 OR the Learning outside The Classroom Badge should be used to ensure the provider meets the requirements of the Local Authority. The activity should be notified as an Adventure activity via Evolve.

Raft building may come within the remit of the Adventurous Activity Licensing Authority depending on the location used: [www.hse.gov.uk/aala/activities.htm](http://www.hse.gov.uk/aala/activities.htm)

Where a leader from Devon or Torbay leads the activity, the following will apply:

- The leader must have appropriate life-saving skills
- The leader should hold an appropriate water sports instructor award – such as British Canoeing or RYA instructor, and have specific training and experience of raft building at that venue

OR

- Hold a 'certificate of competence' from an appropriate technical advisor
- The technical advisor must be agreed with the Local Authority

AND

- The activity should be notified via Evolve with the leader's award added to the system.

#### **Additional controls and safety factors**

- Life jackets or buoyancy aids should be worn by participants on or near the water
- Helmets should be considered during the building process and when launching
- Appropriate clothing and footwear should be worn. Hand protection might be considered, for example to avoid splinters or when pulling on ropes during building

- Instructors should carry or have immediate access to a knife
- A throw line or other reaching device should be to hand
- A first aid kit should be available

Consideration should be given to wind and weather particularly off shore winds and low water temperatures.

### **Safety boats**

Safety cover should be provided on the basis of a local, specific risk assessment. The principle should be that all the participants can be recovered within a maximum of three minutes, and returned to the shore before the effects of cold become significant. Powered safety boats should be helmed by a qualified driver who has a minimum of RYA Level 2 with specific training on raft rescue. It may be appropriate in some circumstances, for example on very sheltered water, for safety cover to be provided from a canoe, windsurf board, non-powered boat, or even by the instructor wading. The instructor and safety crew should be practiced in recovering all the rafters from a collapsed raft.

Further information and guidance is available from [www.aals.org.uk](http://www.aals.org.uk)

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### **1.19 Sailing, windsurfing**

Almost all sailing activity takes place at an established sailing centre or club. RYA Recognition should be used to ensure the provider is working to the standards expected by the LA. In addition to the form SOE5, or the Learning outside The Classroom Badge.

Where sailing activities are led by Devon or Torbay staff, the following will apply:

- The leader must hold an appropriate RYA award, and work within the terms of reference of that award
- The leader should hold an appropriate first aid award
- The session should be conducted in line with RYA guidance for instructor to student ratios, safety boats, etc
- The leader must ensure the visit is notified via Evolve and the leader's awards added to the system

#### **Additional controls and safety factors for *dinghy sailing*:**

At all levels a safety boat should be on hand, staffed by qualified crew. The minimum qualification is RYA Level 2 National Powerboat Certificate, preferably RYA Safety Boat Award. In either case, the safety boat crew must be experienced and competent to rescue the type of dinghy being used.

Emergency arrangements should allow for the recovery and immediate start of resuscitation within three minutes of immersion.

Leaders are expected to operate within the terms of reference of their RYA Award at all times, although not necessarily under the supervision of an RYA recognised teaching establishment.

### **Additional controls and safety factors for *yachts***

Day Skipper and Yachtmaster Awards are proficiency awards and do not necessarily encompass leadership skills. Visit leaders will need to satisfy themselves that the activity will be led by staff who are sufficiently experienced in managing young people or adults.

Accident-free sailing depends, in part, on having a boat that is sound, well-equipped and suitable for the activity it is being used for. The crew should have enough experience and knowledge to operate in the prevailing conditions.

Yachts have to comply with Maritime and Coastguard Agency regulations according to their size and the area of operation. All vessels need either to be operating through an RYA registered school or hold a Small Commercial Vessel Certificate from the MCA [www.mcga.gov.uk](http://www.mcga.gov.uk)

### **Additional controls and safety factors for *windsurfing***

At all levels a safety boat should be on hand, staffed by qualified crew. The minimum qualification is the RYA Level 2 National Powerboat Certificate, preferably the RYA Safety Boat Award. The safety boat crew must be experienced and competent to rescue windsurfers. On sheltered water sites it may be acceptable for the leader to provide rescue cover from a canoe, or their own board. The leader should exercise careful judgement in deciding what rescue cover to provide taking into account the wind and weather, location and the ability of the group. Emergency arrangements should allow for the recovery and immediate start of resuscitation within three minutes of immersion.

- The leader must show knowledge and understanding of the RYA method of teaching
- Recall signals must be clear and known by all
- The sailing area must be clearly defined
- The leader must know the harbour, estuary or river throughout all stages of the tide

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## **1.20 Power boat and safety boat handling**

Power boats can range from small safety craft operated on inland waters, to large off shore cruising boats. The competence of the skipper / driver and the emergency equipment carried will depend on the type of vessel and its operating area.

The RYA are the national governing body for this activity with small craft and yachts and the LA expects all operators to comply with its guidance. Ski boats are subject to different NGB Guidance, see section on Boating - water skiing.

Boats operating commercially will need to comply with Maritime and Coastguard Agency (MCA) Regulations. Groups using commercial boat operators for fishing, cruising, pleasure visits and study visits should ensure that the boat is registered with the MCA and carries appropriate public liability insurance. Form SOE5 can be used to check this.

### **Activity leader competence**

The minimum award to operate a safety boat is the RYA Safety Boat certificate. In some circumstances, a higher award will be appropriate.

### **Additional controls and safety factors**

- Leaders are expected to operate within the terms of reference of their RYA Award at all times
- The boat being used must be suitable for purpose and appropriately equipped, including emergency kit, kill cord, first aid and a communication system
- The number of boats or boards to a safety boat is normally a maximum of 6:1

### **Training opportunities and additional information:**

- The National Governing Body for these activities is the RYA: [www.rya.org.uk](http://www.rya.org.uk)
  - Leaders should be aware of and comply with the requirements of the Maritime and Coastguard Agency (MCA) for Small Commercial Vessels. Details are available from the RYA: [www.rya.org.uk](http://www.rya.org.uk) or the MCA: [www.mcga.gov.uk](http://www.mcga.gov.uk)
  - The MCA regulations come into force for any commercial activity on the sea even when using a privately owned boat. Water skiing, banana rides, fishing and recreational excursions may all fall within the remit of the MCA regulations.
- 

## **1.21 Shooting and Archery**

Groups are recommended to use established external providers for this activity. The form SOE5 should be used to ensure the provider complies with the requirements of the Local Authority.

Additional considerations:

- These activities require an appropriate firing range, properly protecting both users and passers by
- For archery, the leader must have training linked to the national governing body: Archery GB Instructor Award [www.archerygb.org/instructor](http://www.archerygb.org/instructor)
- The activity must be run in line with awarding bodies guidance
- For shooting, the National Small Bore Rifle Association provides guidance for leaders

- and firing ranges: [www.nsra.co.uk/](http://www.nsra.co.uk/)
  - Participants must be provided with protective equipment where appropriate, including wrist guards, ear defenders etc.
- 

## 1.22 Snowsports, including skiing, snowboarding and tobogganing

### Introduction

Visit leaders should be aware of the educational opportunities presented by a snow sport course in this country or abroad and how they may be realised. The residential element of a course creates significant additional responsibilities which need preparation, planning and adequate supervision.

### Activity leader competence: *skiing and snowboarding*

The Visit leader must either hold the Snowsport Course Organiser Award or have significant and applicable previous experience. Where the Visit Leader is relying on competence from previous experience, they must discuss this with the Adviser for Outdoor Education, ensuring that the outcome is recorded through the messaging system on Evolve.

### Supervision of snow sports

Ski teaching or instruction must only be led by instructors who hold a local ski school award OR an appropriate award issued by the British Association of Ski Instructors (BASI), SnowSport England / Scotland, British Mountain Guide Association or other national awarding body. The National Governing Body is Snowsport England. Get details of courses and other information from:

- [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk)
- [www.basi.org.uk](http://www.basi.org.uk)

In order to ensure proper supervision of the young people and to maximise the skiing time, visit leaders should normally arrange for a **minimum** of four hours ski school tuition (two sessions) per day.

### Supervision of snow sports

Members of staff who hold the Alpine Ski Course Leader award or equivalent or higher award, may directly supervise their own groups. They must be able to exercise adequate supervision of their group and have knowledge of the skiing area being used. Ski tuition is outside the remit of the ASCL.

A member of staff who holds the ASCL or higher award may deploy other competent staff to supervise groups, usually for a short time between or after ski school, within the following limitations; each member of staff who supervises a group must:

- Have previous experience of school skiing
- Be fit and competent to supervise
- Be in sight of their group at all times, and under the indirect supervision of the qualified leader
- Use slopes and lifts that the group and supervising adults have used with ski school and that they are comfortable with, generally staying on the easier slopes
- Have clearly defined limits, including slopes and lifts, time and meeting points, emergency arrangements, contact with the qualified leader
- All follow the International code of conduct

### **Recommended staffing ratios**

A ratio of one responsible adult or instructor to ten party members is recommended for organising the course.

### **Preparation for the visit**

The Visit Leader must seek resort-specific information on risks and ensure that this is included in the risk assessment. Reputable resorts and tour operators will be able to provide vital information for use during the planning process.

During the risk assessment process (see page 14) the Visit Leader must ensure that they draw on all suitable resources, not only their past experience and training to ensure that a comprehensive and robust assessment of risks is completed so that the key safety controls can be shared with the rest of the group. Sources of information may include:

- The website for the relevant resort and tour operator
- Visit Leaders should have access to a copy of the handbook '*Going Skiing*' from Snowsport England
- International Ski Federation – [www.fis-ski.com](http://www.fis-ski.com)
- [www.skiclub.co.uk/info-and-advice/before-you-go/on-piste-safety](http://www.skiclub.co.uk/info-and-advice/before-you-go/on-piste-safety)
- Find information on ski injuries and research at [www.ski-injury.com](http://www.ski-injury.com)
- Safety on chairlifts – [www.kidsonlifts.org/](http://www.kidsonlifts.org/)

Before leaving on the trip, the Visit Leader must arrange a parent's evening to ensure that all those going receive a briefing that must include, but not limited to, the following points:

- Not being allowed to ski alone or outside marked skiing areas and trails
- Supervised skiing practice and other snow activities should be carefully monitored
- Reference should be made to local and general safety precautions and accident procedures. A piste map for party members will help

- To reduce the likelihood of injury when skiing, snowboarding or tobogganing they should ski under control and comply with the International Code of Conduct. Skiing recklessly, or at high speed, can lead to serious injury even if a helmet is used
- Helmets should be worn by all skiers and snowboarders at all times and comply with BS/EN 1077/2007 and be correctly fitting and fastened
- The use of knee protection and wrist guards are required for snowboarding in addition to helmets
- Safe use of ski lifts / tows etc. and safety measures (see note below)
- Snow sports are physically demanding and need endurance, strength and mobility. Preparation is essential and a programme of pre-ski exercises and fitness training should be undertaken before any trip
- Instruction should be given in the safe carrying and handling of equipment
- Instruction regarding proper clothing etc. for snow, wind and low temperatures
- Agreed standards of behaviour and policies regarding smoking, alcohol, punctuality, care of rooms, responsibilities to others in the resort, the hotel and on the slopes

A brochure, produced by the Visit Leader for the specific visit is also required and will prepare pupils and inform parents.

Artificial ski slope practice is invaluable as a part of this preparation and planned visits under the direction of a qualified instructor are recommended.

### **Note regarding ski lifts**

**The Visit Leader must determine the type(s) of lift in use at the resort and must ensure that the relevant safety control measures are included in the visit risk assessment and are understood by all those attending the trip.**

One key risk on chairlifts is the wearing of backpacks. Whilst these are usually carried by pupils for packed lunch and drinks, safety conscious tour operators will provide lunch vouchers, thereby eliminating the need to take rucksacks / backpacks to the slopes. Visit Leaders are strongly encouraged to consider this as a key method of risk control.

### **Additional controls and safety factors when on the trip**

- Clear reminders must be given to party members about the safe use of the lifts at the resort. Particular attention to be paid to signage at the resort and instructions given by resort staff and lift operators
- Instructions regarding piste safety and other general safety precautions
- Instructions given about check-in and return times and rendezvous points
- Equipment should be of an acceptable standard and appropriate to each individual. Skis must be fitted with adjustable release bindings and ski brakes. The basic principle of the ski binding mechanism should be explained to party members when fitting, enabling them to identify and report faults. Bindings must be adjusted to suit the weight and physical condition of each skier and should only be altered by appropriately skilled technicians
- Party members should check with instructors or staff if there are problems with equipment

- Checks that all party members are wearing the appropriate clothing including helmets
- Discussion with the travel company representative or their equivalent may overcome unexpected difficulties

### **Non-skiing activities**

Appropriate safety considerations need to be given to non-skiing activities in the event of no snow or for recreation. Where activities are provided by a third party, for example, tobogganing, the visit leader should check the safe operation of the activity beforehand. This may include watching the activity taking place, or taking references from other schools that have used the operator.

If activities such as tobogganing are provided directly by the school staff, then safe operational procedures should be in place based on an assessment of the risks involved. Consideration should be given to:

- choosing a slope with a safe run off at the bottom
- starting young people in small groups from low down the slope initially
- arranging a safe return walking area to the side of the run
- use of gloves, helmets, and other protective equipment as appropriate
- discouraging racing or reckless riding

Visit Leaders planning cross-country skiing or ski mountaineering should ensure plans are notified at an early stage via Evolve.

### **Dry Slope Skiing**

The use of artificial slopes to train for ski courses is encouraged. A minimum staff to student ratio of 1:12 is recommended. Local guidelines and regulations for the use of the slope should be observed. Gloves or mitts should be worn. Loose clothing which may get caught in the tow should not be worn. Where appropriate, the safety procedures stated for skiing should be adhered to.

To instruct skiing on an artificial slope, leaders must hold a minimum of an Artificial Ski Slope Instructor's Certificate or Club Instructor's Award.

Most slopes provide instruction to groups. The form SOE5 can be used to ensure the provider meets the requirements of the Local Authority.

## **1.23 Snorkelling and sub-aqua**

### **Snorkelling**

Snorkelling is often the gateway to the more complex sub-aqua diving activities for

young people. However, snorkelling is a challenging activity in its own right.

The activity is best taught in either a swimming pool or shallow, sheltered open water by teachers who have gained the appropriate award of the British Sub Aqua Club (BSAC) or the Professional Association of Dive Instructors (PADI). In open water leaders must also hold the Royal Lifesaving Society's Bronze Award or its equivalent.

Pupils must be made aware of the need to clear their ears and to avoid exhaustion and hyper ventilation and the correct use of snorkel equipment.

Open water snorkelling should take place under the organisation of qualified leaders and instructors with due regard to experience, conditions and safety cover.

### **Sub-aqua diving**

Diving is a specialised activity which, in the UK, relies on thorough training and a high degree of specialised equipment.

The British Sub-Aqua Club (BSAC) provides guidance on the minimum age at which young people may dive and train, and within what limits, including Junior Diving Members aged between 12 and 14. The Professional Association of Dive Instructors (PADI) sets the lower age limit at 10 years old and offers a 'Bubblemaker' activity for younger divers.

### **Additional controls and safety factors**

- All diving activities should take place with a recognised training facility, either a BSAC branch or school, or a PADI dive school or centre
- Initial training should be carried out in a swimming pool using a BSAC or PADI training programme with appropriately qualified staff, such as a BSAC Instructor or Dive Leader
- Open water diving should be carried out under the overall organisation and control of an instructor with a minimum of BSAC Club Instructor qualification or PADI equivalent
- The ratio of instructor to student in the water should be according to the relevant BSAC or PADI guidelines
- Open water diving needs to be carried out with due regard to careful progression of the pupil's experience and the prevailing conditions and depth

### **Training opportunities and additional information**

- The National Governing Body for this activity is the British Sub Aqua Club (BSAC), [www.bsac.com](http://www.bsac.com)
  - BSAC also qualifies leaders as snorkelling instructors.
  - The Professional Association of Diving Instructors (PADI) is a worldwide organisation that offers training courses and supervised diving to an acceptable standard: [www.padi.com](http://www.padi.com)
-

## 1.24 Surfing

### Activity leader competence: surfing - using Malibu boards or body boards

Most surfing activities take place at established surf schools. Groups should ensure they choose a Surfing England approved school. Form SOE5 should also be used.

Where a Devon or Torbay leader takes charge of the activity, the following will apply:

- Body boards – leader must hold MINIMUM Royal Lifesaving Society's Bronze Medallion (or equivalent), AND the activity MUST take place on a lifeguarded beach. Max 1:8 in water ratio
- Malibu boards – the leader must hold the Surfing England Coach Level 1 award AND the activity MUST take place on a lifeguarded beach. Max 1:8 in water ratio

The member of staff may retain a supervisory role from the water's edge or accompany the group in the water, taking into account the risk assessment. The whereabouts of the nearest telephone contact point should be known in case of emergency.

### Recommended minimum staffing ratios

Surfing England recommend a ratio of no more than 8 surfers to one instructor.

### Additional controls and safety factors

- Surfers should be made aware of and follow the Surfing England Code of Conduct
- The leader must be fully aware of the prevailing local conditions: surf, tide, wind and weather and be fully confident of rescuing any member of the group
- The leader must consult the lifeguard patrol wherever possible and follow their advice
- The leader must be in control of the whole group, including those out of the water
- All surfboards should be in good condition and have ankle straps; body boards should have wrist straps. It is recommended that soft skinned Malibu boards are used by beginners
- Members of the group should wear wetsuits and swimming costumes or other clothing appropriate to the water temperature and weather conditions
- An area of operation must be designated, and the leader must know the commonly used signals of distress and recall
- All members of the group must be competent swimmers in the light of the conditions
- When beginners are being introduced to the activity, consideration must be given to pairing a participant with a shore based observer

### Training opportunities and additional information

The National Governing Body for surfing is Surfing England (formerly SurfGB); [www.surfingengland.org/](http://www.surfingengland.org/). Surfing England runs an accreditation system for surf schools, which provides the basis for staff wishing to instruct or teach surfing.

## 1.25 Swimming other than in public pools

Outdoor swimming is an enjoyable but potentially hazardous activity. It may involve swimming in the sea, a lake or river. The use of recognised bathing areas will reduce potential hazards. See also the section on Beach and Coastal Safety. The details below apply to activities in the UK and abroad.

### Leadership qualifications

**Life guard patrolled beaches:** The visit or group leader from the school must hold a minimum of the Royal Lifesaving Society's Bronze Medallion or equivalent. The group must follow the advice of the lifeguards and stay within the supervised area. Note that the role of the life guard complements, rather than replaces, the role of this qualified member of staff, unless specific agreement has been reached with the lifeguard that they are able to supervise your group.

**Beaches with no lifeguard present:** The leader must hold a minimum of the RLSS Bronze medallion award or equivalent. Only known safe swimming beaches should be used. Leaders must take into account the limitations of their own experience and competence. They must ensure that the prevailing conditions are suitable both for themselves to act as the life guard and for the ability of the group.

**Lakes, rivers and canals:** Swimming in these environments presents particular risks in terms of depth, temperature and access which must be carefully assessed beforehand. Gain local information about any dangers. The leader must hold a minimum of the RLSS Bronze Medallion or equivalent and be capable of a rescue from the deepest part of the swimming area.

In all cases the leader must be aware of the limitations of their own experience and competence. Where splash-about swimming takes place, for example at the end of a canoeing or sailing session, the lifesaving and supervision should be provided by the canoeing or sailing instructors, provided that the swimmers wear a buoyancy aid.

### Recommended minimum staffing ratios - 1:10 (Minimum 2 adults at all times)

A competent member of staff must be land-based observing the group at all times. Leaders should consider the merits limiting the number of swimmers in the water at any one time and keep swimmers within their depth.

### Safety factors

Leaders should be aware of the effects of sudden immersion in cold water. The leader should make an assessment of the risks posed by the prevailing conditions: for example, surf and tide, the weather, currents, wind, undertows, cold, weeds, submerged objects, fencing, polluted water and the stability of the sea or river bed. Leaders should also get local information where possible.

Lakes, rivers and canals will generally be colder than the sea. An area of operation should be designated, and the leader should know the commonly used signals of distress and recall. A signal system should be adopted. For example:

- to gain attention is one blast of the whistle
- to clear the swimming area is two blasts of the whistle

The leader should have appropriate rescue equipment to hand such as a throw line, a buoyant rescue device or something for a struggling swimmer to hold onto. The use of a throwline effectively requires prior practice or formal training.

### **For supervision of swimming in private pools, the following applies:**

Maximum water depth less than 1.3 metres, supervision by adult with up to date first aid award.

Water depth greater than 1.3 metres, supervision by adult holding a life-saving award such as the RLSS Bronze or equivalent.

In all cases, the leaders should be fully aware of the emergency procedures for the site.

The leader should be in control of the whole group including those out of the water. All members of the group should be competent swimmers in the light of the conditions and the degree of supervision; it is worth noting that young people who drown are often strong swimmers.

Find training opportunities and more information at: Royal Life Saving Society  
[rlss.org.uk/professional-qualifications/](http://rlss.org.uk/professional-qualifications/)

For water edge activities where swimming is not intended visit leaders are encouraged to seek training through the RLSS National Water Safety Management Programme [rlss.org.uk/professional-qualifications/nwsmp/](http://rlss.org.uk/professional-qualifications/nwsmp/)

*Group Safety at Water Margins* can be found at:  
[Evolve/resources/guidance,policies,documents](http://Evolve/resources/guidance,policies,documents)

### **Education and training for staff and volunteers**

Courses on managing or delivering outdoor activities are available through Babcock Learning and Development Partnership. Training opportunities are also available through a wide range of other providers, including national governing bodies. Reference is made to course providers for activities listed in each section. Babcock LDP also provides Visit Leader Training and Educational Visits Co-ordinator training.

Find training opportunities at: [www.babcock-education.co.uk/ldp/courses/bookings/](http://www.babcock-education.co.uk/ldp/courses/bookings/)

## APPENDIX

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## Planning checklist for visits and off-site activities

This checklist provides a summary of the main points which should be considered by the visit leader when planning a visit off-site. The checklist may be used as an aide-memoire by the visit leader or may be a formal record for the headteacher or governing body. It may therefore be used by the headteacher to decide whether to give approval for a visit.

Completion of an Evolve visit form will help to take you through these steps. The checklist is designed to help the headteacher, EVC and the visit leader ensure:

- the health, safety and wellbeing of young people and staff including volunteers
- young people gain the maximum educational benefit from the visit or activity
- effective management, planning, organisation and leadership
- compliance with policies and statutory requirements.

### 1. Visit leader (see page 4)

Is there a clearly identified visit leader, sufficiently experienced and competent to assess the risks and dynamically manage the proposed visit or activity? Will the visit leader be present throughout the visit or will there be some remote supervision? (see page 34)

### 2. Purpose (see page1)

Is there a clearly identified educational purpose for the whole programme and any of its constituent parts, appropriate to the age and ability of the group?

### 3. Risk assessment (see page 14)

Has the visit leader assessed the risks involved in all aspects of the visit or activity and recorded the significant findings, or made reference to a previous record, with amendments as necessary?

See School Standard Operating Procedures at [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation).

Are the staff involved in the visit sufficiently able and experienced to re-assess risks on an on-going basis throughout the programme?

### 4. Preliminary visit

Has the visit leader made a preliminary visit to the site or centre to be visited, to check arrangements? These include; travel time, access and permission, facilities and equipment, leisure or recreational facilities for residential stays, staff support, guides or programmes of work, potential health and safety issues, shelter, toilets, costs, accommodation, contingency arrangements, references from previous users. If no pre-visit has been carried out, has action been taken to ensure the visit leader is aware of potential hazards and opportunities?

**5. Location**

Is the proposed location of the visit suitable for the activity being done and appropriate for the group?

**6. Advice**

Has advice been sought from someone with expertise or technical competence where there is uncertainty about safe practice? This may be the EVC, an external technical expert, or the adviser for outdoor education.

**7. Approval** (see page 20)

All visits must be approved by the headteacher or the EVC acting on behalf of the headteacher. Does the proposed activity involve: adventurous activities (category B) or a visit abroad (category C)? If so, in addition to approval from the headteacher the visit may also need to be endorsed by the adviser for outdoor education via Evolve.

**8. Venue and use of External Providers**

Does the visit involve adventurous activities booked through a commercial, charitable or private provider? If so, see section 4. You may need to forward a copy of the form SOE5 in the appendix to the provider to confirm that they meet expected standards.

**9. Staff** (see section one)

Are members of staff, including volunteers, suitably competent – experienced, qualified and able – to supervise the individuals and groups they are responsible for, in that environment?  
Are members of staff, instructors or volunteers leading adventurous activities suitably competent to do so?  
Do members of staff have sufficient knowledge of young people for whom they are responsible?  
Have members of staff or adult volunteers been DBS checked, where necessary?

**10. Staff to young people ratio** (see page 27)

Will the group have the acceptable staff to young people ratio necessary for the activities proposed?  
Do plans and staffing ratios reflect the needs of anyone with a disability or needing extra support?  
Does staffing include male and female supervision, where necessary?  
Does the staffing ratio reflect any possible conflict of interest for staff whose own children are on the trip?  
Does the airline require specific supervision levels?

**11. Parental and guardian consent**

(refer to the parental consent forms in the Appendix)

Have parents and guardians given their informed consent for the visit as a whole and for any adventurous activities which are planned?

**12. The programme**

Do young people and staff have the appropriate clothing and equipment necessary for the activities proposed, allowing for a range of weather conditions?

If not, will an external provider be offering appropriate equipment?

Are the young people prepared for and physically capable of taking part in the proposed activity?

Is the programme suitable for all of the participants?

Is there an alternative programme (a Plan B) in the event of poor weather, or other necessary change and have the risks related to Plan B been considered?

Does the programme reflect a responsible attitude towards the environment?

**13. Organisation**

Are staff aware of dietary and medical needs of young people and staff?

Have suitable and sufficient arrangements been made for first aid? (see page 31)

**14. Transport** (see page 32)

Is appropriate transport available?

Are there suitable and sufficient qualified and DBS checked drivers for any planned minibus journey?

Will departure and return times be made known to staff, young people and parents?

Is there a contingency plan in the event of a delay or early return?

**15. Insurance and finance** (see page 12)

Is there adequate and suitable insurance cover?

Have arrangements been made to finance the visit and manage the associated funds?

**16. Briefing for young people**

Will the young people be properly briefed on the activities they will do during the visit? The briefing may need to include: appropriate clothing and equipment; rendezvous procedures; mobile phone protocols/usage; safety risks of jewellery; groupings for study or supervision; a system of recall and action in emergencies; agreed codes of conduct and behaviour; significant hazards, including water; relevance to prior and future learning

**17. Briefing for staff**

Will the visit leader also brief adults and voluntary helpers?

The briefing may need to include: anticipation of hazards and the nature of the programme; defining roles and responsibilities of staff; careful supervision to cover the whole time away; arrangements for any indirect supervision where applicable; standards of behaviour expected from young people; regular counting of participants; how much help to give to young people in their tasks; a list of names of people in sub groups; emergency procedures; specific medical requirements of group members

**18. Emergency procedures**

Has a named emergency contact been identified at home or at base in the event of an emergency, who has a contact list of the group members including staff and a programme of the group's activities? For out of work hours, two emergency contacts should be identified. Are the staff sufficiently aware of emergency and accident procedures and do they have access to relevant emergency and group home contact numbers?

**19. Preparation and communication**

Is there adequate time and opportunity to prepare for the visit or activity?

Have other staff and colleagues whose work may be affected been notified of planned arrangements?

**20. Follow up**

Have arrangements been considered for appropriate follow up work and evaluation after the visit?

Has a report been provided for the headteacher or other colleagues, where appropriate, to share outcomes arising from the visit and learn from problems or incidents?

Have other records been completed, for example those related to vehicles or equipment?

Have financial records been completed?

AALA Licensable activities	Activities <u>not requiring an AALA licence</u> and can be delivered by DCC employees
<b>Climbing</b> (on natural outdoor features)	<b>Climbing</b>
<ul style="list-style-type: none"> <li>• Abseiling (incl. on buildings &amp; disused railway viaducts)</li> <li>• Bouldering (specialist equipment/techniques required)</li> <li>• Canyoning</li> <li>• Coasteering</li> <li>• Gorge walking or Ghyll scrambling</li> <li>• Ice climbing</li> <li>• Rock climbing</li> <li>• Sea level traversing</li> <li>• Via Ferrata</li> </ul>	<ul style="list-style-type: none"> <li>• Abseiling towers</li> <li>• Bouldering (if no specialist equipment/techniques required)</li> <li>• Climbing walls</li> <li>• Crate climbing</li> <li>• Jacob's ladder</li> <li>• Pool jumping/Tomb stoning/Plunge pooling</li> <li>• Ropes courses (incl. obstacle/assault courses)</li> <li>• Scrambling (if no specialist equipment/techniques required)</li> <li>• Tree scrambling</li> <li>• Tyrolean traverse</li> <li>• Weasiling (as distinct from caving/ bouldering)</li> <li>• Zip wires</li> </ul>
<b>Trekking</b> (journeying in remote moorland/mountain areas above 600m)	<b>Trekking</b>
<ul style="list-style-type: none"> <li>• Fell running</li> <li>• Hill walking</li> <li>• Improvised sledges</li> <li>• Mountaineering</li> <li>• Off-piste snow sports</li> <li>• Off-road cycling/Mountain biking</li> <li>• Orienteering</li> <li>• Pony trekking</li> <li>• Ski touring</li> <li>• Ski touring</li> <li>• Wave skiing</li> </ul>	<ul style="list-style-type: none"> <li>• Camping (in remote terrain)</li> <li>• Grass slope skiing</li> <li>• Mountain boarding</li> <li>• On-piste snow sports</li> <li>• On-road cycling</li> <li>• Quad bikes</li> </ul>
<b>Watersports</b> (on most lakes, fast flowing rivers & the sea)	<b>Watersports</b>
<ul style="list-style-type: none"> <li>• Artificial whitewater courses</li> <li>• Bell boats</li> <li>• Dragon boating</li> <li>• Duckies</li> <li>• Hydrospeeding/Hydroboarding</li> <li>• Improvised rafting</li> <li>• Katakonus</li> <li>• Keel boats</li> <li>• Kite surfing</li> <li>• Open canoeing/kayaking (sea &amp; inland)</li> <li>• Paddle surfing</li> <li>• River bugs</li> <li>• Sailboarding/Sailing (boats &amp; dinghies)</li> <li>• Sit on tops</li> <li>• Stand-up kayaks</li> <li>• Stand-up paddleboarding</li> <li>• Surf skiing</li> </ul>	<ul style="list-style-type: none"> <li>• Blo-karting</li> <li>• Body boarding</li> <li>• MCA registered yachts</li> <li>• Open water swimming</li> <li>• Power boats (and floats towed behind)</li> <li>• Powered/towed inflatable/rafts</li> <li>• Rigid inflatable boats (RIB)</li> <li>• Rowing boats</li> <li>• Sand/land yachting</li> <li>• Scuba diving</li> <li>• Snorkelling</li> <li>• Surfing</li> <li>• Wake boarding</li> <li>• Water skiing</li> </ul>

<ul style="list-style-type: none"> <li>• Wave skiing</li> <li>• White-water rafting</li> <li>• Windsurfing</li> </ul>	
<b>Caving and Underground</b> (in natural caves or mines)	<b>Caving and Underground</b>
<ul style="list-style-type: none"> <li>• Cave diving</li> <li>• Caving</li> <li>• Mine exploration</li> <li>• Pot-holing</li> </ul>	<ul style="list-style-type: none"> <li>• Artificial cave systems</li> <li>• Mines still being worked</li> <li>• Show caves/tourist mines</li> </ul>
<b>Miscellaneous</b>	<b>Miscellaneous</b>
	<ul style="list-style-type: none"> <li>• Adventure games</li> <li>• Air rifles</li> <li>• Airborne Activities</li> <li>• Archery</li> <li>• BMX biking</li> <li>• Bridge jumping</li> <li>• Bungy jumping</li> <li>• Clay pigeon shooting</li> <li>• Environmental studies</li> <li>• Fencing</li> <li>• Go karting</li> <li>• Paint balling</li> <li>• Problem solving activities</li> <li>• Rifle shooting</li> <li>• Survival &amp; Bushcraft</li> <li>• Team building exercises</li> </ul>

## CAN YOU DRIVE A MINIBUS?

By comparing your driving licence to the driving licences below you can determine what type of minibus you can drive and under which regulations.

**This person passed their car (category B) driving test AFTER 1 January 1997**



If you passed your category B driving test on or after 1 January 1997, you may drive a minibus that is not being used for hire and reward<sup>1</sup> if the following conditions are met:

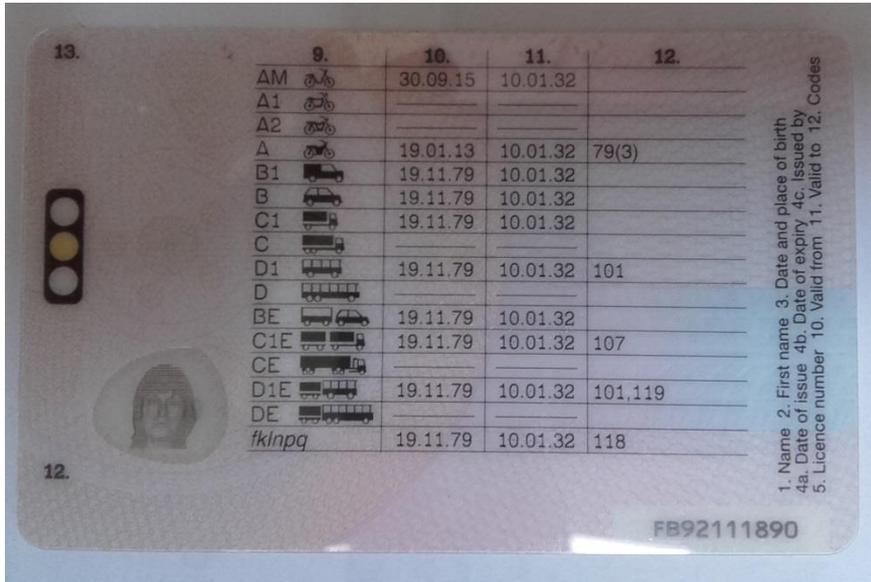
- You are over 21 and have held a category B licence for at least 2 years
- The minibus is used by a non-commercial body for social purposes (i.e. a school)
- You receive no payment other than the recovery of your out-of-pocket expenses (e.g. fuel and parking costs)
- You provide the service on a voluntary basis<sup>2</sup>
- The gross vehicle weight of the minibus **fully laden** is not more than 3.5 tonnes (or 4.25 tonnes if including any specialist equipment to carry disabled passengers)
- You do not tow a trailer.
- The establishment holds a Section 19 Permit<sup>3</sup> which must be displayed in the minibus

### Notes:

1. Hire and Reward means payment (of any kind) that entitles passengers to carriage. If a minibus is being used for a school visit and payment is made for the visit (not just for the minibus journey) then this is deemed to be 'for hire and reward'. See Section 19 permits below
2. Voluntary basis means driving a minibus is not specified in your contract of employment

3. Section 19 permits allow educational establishments to make a charge for carriage (as is the case for the majority of school visits) without the need for a full Passenger Service Vehicle Operators Licence. Section 19 permits are available from the Traffic Commissioner online. [www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372](http://www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372)

**This person passed their car (category B) driving test BEFORE 1 January 1997**



If you passed your category B (car) driving test before 1 January 1997, you can drive a minibus that is not being used for hire or reward<sup>1</sup> as these licences automatically include category D1 (101) (not for hire or reward) entitlement.

- This means school staff with such a licence can drive a minibus carrying up to 16 passengers with no maximum weight restriction on the vehicle.
- You provide the service on a voluntary basis<sup>2</sup>
- The establishment holds a Section 19 Permit<sup>3</sup> which must be displayed in the minibus
- Drivers with a D1 + E (101) (not for hire or reward) entitlement can tow a trailer over 750kg.

**Notes:**

1. Hire and Reward means payment (of any kind) that entitles passengers to carriage. If a minibus is being used for a school visit and payment is made for the visit (not just for the minibus journey) then this is deemed to be 'for hire and reward'. See Section 19 permits below
2. Voluntary basis means driving a minibus is not specified in your contract of employment
3. Section 19 permits allow educational establishments to make a charge for carriage (as is the case for the majority of school visits) without the need for a full Passenger Service Vehicle Operators Licence. Section 19 permits are available from the Traffic Commissioner online. [www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372](http://www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372)

## This person has passed a separate PCV driving test



If you passed a separate PCV (passenger carrying vehicle) driving test you can drive a minibus that is being used for hire or reward<sup>1</sup>. These licences include category D1 but do not have the 101 not for hire or reward endorsement.

- This means school staff with such a licence can drive a minibus carrying up to 16 passengers with no maximum weight restriction on the vehicle.
- IF you provide the service on a voluntary<sup>2</sup> basis the establishment does not need a PSV Operators Licence, as long as the establishment holds a Section 19 Permit<sup>3</sup> which must be displayed in the minibus
- Entitlement to tow a trailer is determined by the date your original driving test was taken.
- If you are contractually obliged to drive a minibus your establishment must hold a PSV Operators licence.

(The code 01 on this particular licence, not 101, means the driver must wear corrective glasses when driving a minibus but not a car as the medical requirements for minibus driving are stricter)

### Notes:

1. Hire and Reward means payment (of any kind) that entitles passengers to carriage. If a minibus is being used for a school visit and payment is made for the visit (not just for the minibus journey) then this is deemed to be 'for hire and reward'. See Section 19 permits below
2. Voluntary basis means driving a minibus is not specified in your contract of employment
3. Section 19 permits allow educational establishments to make a charge for carriage (as is the case for the majority of school visits) without the need for a full Passenger Service Vehicle Operators Licence. Section 19 permits are available from the Traffic

Commissioner online. [www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372](http://www.gov.uk/government/publications/application-for-a-standard-or-large-bus-permit-psv372)

## **EMERGENCY ACTION CARDS**

Whilst careful planning of visits will prevent most problems, the nature of off-site visits and adventurous activities means sometimes things will go wrong. To assist visit leaders, headteachers, establishment staff and governors a suite of emergency cards and emergency response documents are available at: [Evolve/Resources/Guidance, Polices & Documents/Emergency Action](#)

Critical Incident Visit Leader Action Card. Adapt this card to your establishment and make sure the Visit Leader and all accompanying staff have a copy with them at all times.

### ***Critical Incident First Contact Card***

The person who answers the phone in the school office or the back-at-the-base contact will not be expecting a call from the visit leader saying they are in trouble. As soon as a call for help is received the respondent should take this contact card and get the information required from the visit leader. This may be your only opportunity to speak to them. Adapt this card to your establishment and make sure the relevant people have it to hand:

- School office – clearly marked
- In the possession (at home) of SLT or anyone acting as Back at Base contact

### ***Critical Incident Senior Manager Action Card***

Establishment staff may be unpractised in dealing with critical incidents on visits, this action card provides prompts and advice for managing your response to critical incidents. Adapt this card to your establishment and make sure the relevant people have it to hand:

- School office – clearly marked
- In the possession (at home) of SLT or anyone acting as Back At Base contact

### ***'Teacher Down' Emergency Action Card***

Often the default position for visit leaders is to 'phone the school' if something goes wrong, without consideration for something 'going wrong' with the Visit Leader themselves.

When there is only one visit leader or when staff are supervising small groups away from the main party, the employer should consider how they can meet the needs of the employee as a 'lone worker'. This card provides instructions for pupils in order to look after the adult and themselves.

Adapt this card to your establishment. On the rare occasions when there is only one visit leader, the whereabouts of this card should be made known to pupils (minibus glove box, teacher's rucksack etc.)

Appropriate training should be given to pupils as to what to do in the event of a teacher being incapacitated. It is only anticipated that secondary age pupils should have access to this information

### ***Student Emergency Action Card***

During visits where students will be remotely supervised, (in the UK or overseas), the headteacher teacher must ensure there are appropriate plans in place in case pupils become lost or experience difficulties. Adapt this card to your establishment and for each type of Visit.

### ***Critical Incident Additional Support and Advice***

Experience of critical incidents teaches us that a wide support network is often needed including professional support and advice; media, legal, medical, insurance etc. Adapt this card to your establishment including your supporting professionals/services. The card lists the contact details of the services offered by the Local Authority to Maintained Schools only. Academies and Independent Schools should make similar provision.

## EMERGENCY PROCEDURES

In the event of an emergency, accident or serious illness the visit leader must follow the school's own emergency plan. All accompanying staff/volunteers must be made aware of what the emergency plan is. The following notes are for guidance and the procedures listed will not all apply to all emergencies:

1. Assess the nature and extent of the emergency
2. Make sure all other group members are safe from danger and are looked after
3. Give first aid and attend to any casualties
4. Call the emergency services as needed. As a minimum you are likely to be asked:
  - your precise location
  - a description of the incident
  - the time of the incident
  - the number of casualties and nature of injuries
  - the total number in the party
  - your contact details

If the police are involved they will take any statements.

An adult from the party should accompany any casualties to hospital and:

- Supervise and support the rest of the group and arrange for their return to base
- Contact your establishment 'back at base' advise them of the situation and specify what support is needed
- Inform young people whether they may use any mobile phones and in what circumstances
- Arrange for one adult to remain at the incident site to help or liaise with the emergency services
- Contact the off-site base to communicate with other staff in the party (outdoor centre, hotel, youth hostel etc.)
- If the party is abroad, consider contacting the local British consulate or embassy to seek their support.

For a serious incident, where the media may be involved, identify alternative phone numbers at home and off-site base as other lines may quickly become jammed. The headteacher or designated senior member of staff may need to contact the Director for Children's Services or the nominated officer in the Council's Emergency Plan, give details of the incident. In cases of a major incident out-of-hours involving the emergency services, the police will make direct contact with the Emergency Planning Service Duty Officer who will then take appropriate action.

The headteacher will arrange to contact parents and carers of those involved as soon as possible. For a serious incident the headteacher should contact parents of all party members. It is also the responsibility of the headteacher, or designated support staff, to act as a link between the group involved, the chair of governors, the council and parents.

The Council will normally liaise with the media with respect to maintained schools. A designated person should act as the ongoing point of contact with the media and all involved should direct questions and requests to them. This person will need to liaise with the emergency services, perhaps on site.

The school website or existing parent communication systems using texts can provide a useful means by which general information to parents is made available and updated.

Write down all relevant details while still fresh in the memory. Other group leaders may be asked to do the same. A record should be kept of names and addresses of any witnesses. Keep any equipment involved in its original condition. If possible do not disrupt the scene of the incident until a full investigation has been completed

Restrict access to a telephone until you have informed the headteacher and there has been enough time for the headteacher to contact those directly involved. Legal liability should not be discussed or admitted.

Refer requests from the media to the designated individual as identified above. Contact insurers, particularly if medical assistance is needed. Complete and forward all accident forms and reports.

For serious incidents consider further professional counselling support for those directly or indirectly involved.

Staff members should know the mobile phone numbers of other key staff in the party. However, difficulties frequently arise with mobile phones due to reception, battery power or insufficient credit. Visit leaders need to consider these potential problems as part of their risk assessment.

## Form SOE3: Parental consent for off-site activities

### Dear parent or guardian

You have already received details about our forthcoming visit or activity. Please complete and return this form giving your consent for your child to take part in this activity.

**School, college or establishment**

**Visit or activity**

**Dates and times**

**Name of child**

**Date of birth**

**Special details** - any information about your child's health which may need special attention, but does not prevent them from taking part should be noted below. (For example; any allergies, any medication needed and the dosage, travel sickness, diabetes, asthma or epilepsy?)

**Has your child had any relevant recent illness?**

**Does your child have any specific dietary requirements?**

**Do you have any additional comments?**

**Swimming ability** (for water based activities)

Is your child able to swim 50 metres? YES / NO

Is your child water confident for the proposed activity? YES / NO

1. I would like my child to take part in this visit or activity and having read the information provided agree to him/her taking part in the activities described.
2. I consent to any emergency medical treatment required by my child during the course of the visit.
3. I confirm that my child is in good health and I consider him/her fit to participate.

**Signature of  
parent or guardian**

**Date**

**Name of parent or guardian**

**Address**

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**Telephone number**

**Home:**

**Work:**

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**Name of family doctor**

**Approximate date of last tetanus injection:**

*Section to be completed by schools in compliance with General Data Protection Regulations. Schools may wish to add an explanatory paragraph regarding their data management and make reference to their privacy notice and named Data Protection Officer here.*

## **Form SOE3a: Parental consent for local off-site activities (Annual consent form)**

**Dear parent or guardian,**

This is a consent form to cover local off-site trips and visits that your child may be undertaking during the school year, some of which may extend beyond the school day. A separate consent form will be sent out for any residential or overseas visits and for adventurous activities (as defined by the local authority). Details of each visit will be sent to you in advance.

**School, college or establishment**

**Outline of planned visits**

**Name of child**

**Date of birth**

**Special details** - any information about your child's health which may need special attention, but does not prevent them from taking part should be noted below. (For example; any allergies, any medication needed and the dosage, travel sickness, diabetes, asthma or epilepsy?)

**Has your child had any relevant recent illness?**

**Does your child have any specific dietary requirements?**

**Do you have any additional comments?**

- 4. I would like my child to take part in the programme of visits planned for the school year. I understand that the arrangements for each visit will be sent to me in advance.
- 5. I consent to any emergency medical treatment required by my child during the course of the visit.
- 6. I confirm that my child is in good health and I consider him/her fit to participate.

**Signature of  
parent or guardian**

**Date**

**Name of parent or guardian**

**Address**

**Telephone number**

**Home:**

**Work:**

**Name of family doctor**

**Approximate date of last tetanus injection:**

*This section to be completed by schools in compliance with General Data Protection Regulations. Schools may wish to add an explanatory paragraph regarding their data management and make reference to their privacy notice and named Data Protection Officer here.*

## Form SOE5 - Provider Standards Questionnaire: use of commercial, charitable and private facilities

To be completed by providers of outdoor education, visits and off-site activities to schools and education establishments.

**Insert Name of Provider Organisation:**

The provider named above is 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. Please write YES to all specifications you meet. Write NO for any specification you cannot meet. Write N/A against any specifications which do not apply to your provision.

**Section 1 To be completed by ALL Providers.**

**Section 2 To be completed by Adventurous Activities providers**

**Section 3 To be completed by Tour Operators**

**Section 4 To be completed by providers of Expeditions outside of the UK.**

### Section 1

All Providers	Write YES, NO or N/A
<b>Insurance</b>	
1. The provider has public liability insurance for a minimum of £5 million.	
<b>Health, Safety and Emergency Policy</b>	
2. The provider complies with the relevant health and safety regulations, including the Health and Safety at Work Act 1974 and associated regulations for visits/activities, and has a health and safety policy and recorded risk assessments which are available for inspection.	
3. Accident and emergency procedures are maintained and records are available for inspection.	
4. The provider operates a policy for staff recruitment, induction and training that ensures that all staff with a responsibility for participants have the experience and competence to undertake their duties.	
5. There is a clear and communicated definition of responsibilities between the provider's staff and visiting staff regarding supervision and welfare of participants.	
6. The provider has a Code of Conduct which will be employed where appropriate and supplied in advance of any booking. Visiting groups should adhere to the Code of Conduct.	
<b>Staffing</b>	
7. The provider has a safeguarding policy covering staff recruitment, induction and training. To support this policy all reasonable steps are taken to check staff/volunteers, who will have access to young people, for relevant criminal history and suitability for work with young people. (i.e. UK DBS checks)	
8. There are adequate and regular opportunities for liaison between school/organisation staff and the provider's staff to agree learning outcomes and to agree if necessary any changes to the programme.	
<b>Inclusion &amp; Environment</b>	
9. 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 Special Educational Needs and Disability Act 2001 and Disability Discrimination Act 2005.	
10. The provider encourages responsible attitudes to the environment and/or promotes wider sustainability issues as an integral part of the programme.	
<b>Vehicles</b>	
11. All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used.	
12. Where applicable drivers are PCV qualified or operate with a small bus permit and local minibus driving assessment.	
13. All drivers are appropriately insured and hold a valid licence to drive them on behalf of the provider.	
<b>Accommodation (if residential or main use accommodation is provided)</b>	
14. A fire risk assessment has been completed, reviewed appropriately and meets the requirements of the Regulatory Reform (Fire Safety) Order 2005.	
15. Security arrangements have been assessed and all reasonable steps taken to prevent unauthorised persons entering the accommodation.	
16. Separate male and female sleeping accommodation and washing facilities are provided. Staff accommodation is suitably located to ensure adequate supervision.	

## Section 2

<b>Adventurous Activities and Field Studies in Outdoor Environments.</b>	
<b>AALA Licence</b> 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 applications with respect to any activities or aspects of their provision offered that are not covered by the licence.	
17. Adventure Activities Licensing Authority (AALA) Licence held. (Please provide Reference Number and Expiry Date).	
<b>Activity Management</b>	
18. The ratios of staff to young people for the activities confirm to those recommended by the appropriate National Governing Bodies (NGB) & LA, or, in the absence of this, the provider's Code of Practice informed by risk assessment.	
19. The provider maintains a written code of practice for activities, which is consistent with relevant NGB guidelines or in their absence, recognised national/best practise standards.	
20. Staff competences are confirmed by the appropriate NGB qualification for the activity to be undertaken, or staff have had their competences confirmed by an appropriately experienced and qualified technical adviser.	
21. The provider has made an assessment of the first aid needs of employees and visitors/participants. There will be adequate and appropriate facilities along with access to a person with a valid and appropriate level of first aid qualification. Staff are practised and competent in accident and emergency procedures.	
22. All equipment used in activities is suited to the task, adequately maintained and monitored in accordance with statutory requirements and current good practice, with records kept on maintenance checks where necessary.	

## Section 3

<b>Tour Operators / Package Holidays</b> Where a tour operator delivers services 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 A and B of this form and that these providers operators to standards which meet the relevant regulations which apply to the country of operation.	
23. The Tour Operator complies with package Travel Regulations, including bonding to safeguard customers' monies.	
24. Security in the case of Insolvency - There is an on-going legal requirement to have sufficient evidence of security for the protection of pre-payments in the event of insolvency under The	

Package Travel, Package Holidays and Package Tours Regulations 1992. This states that businesses offering "packages" must be able to provide this evidence at all times. Please tick to confirm that this is understood and will be complied with.	
25. ATOL, ABTA or other bonding body name and numbers:	
26. If abroad, the accommodation complies with fire, health and safety regulations, which apply in the country, concerned.	

#### Section 4

Expeditions	
27. The provider has completed sections A and B of this form and agrees to provide additional written assurance which are specific to the expedition being proposed and which will be made clear to the provider by the LA Outdoor Education Adviser.	

**If any of the above specifications cannot be met, please give details below. Also please give details of any other accreditation with national governing bodies, tourist boards etc.**

**Organisation:** \_\_\_\_\_

Signature required from centre/operations manager

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

**Name:** \_\_\_\_\_ **Position:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Thank you for completing this form. Please return it to:  
(enter details of school or establishment**

