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GENERAL INTRODUCTION

The original Guidelines for Educational Visits and Outdoor Education Activities was issued in 1994. In part the guidance was issued following the Lyme Bay tragedy. This incident caused all involved in outdoor activities to take stock and to review their procedures. It also motivated the government at the time to launch a major consultation about outdoor activities and this led to the Activity Centres (Young Persons’ Safety) Act 1995. This, in turn, brought about The Adventure Activities Licensing Scheme in 1996. Since then the Department for Education and Employment issued Health and Safety of Pupils on Educational Visits (1998) and in August 2002 the Department for Education and Skills produced three supplementary guidance booklets Standards for LEAs in Overseeing Educational Visits, Standards for Adventure and A Handbook for Group Leaders. Many of the recommendations made in these guidelines have been included here and the use and assistance of these recommendations is freely acknowledged.

This guidance (2003) is issued to help and support all people involved in the approval, organisation and planning of educational visits and outdoor education activities in order that young people may contribute to and benefit from well-organised, successful, safe and enjoyable activities.

It is essential that the guidelines are read carefully by all concerned in approving, organising, leading or supporting educational visits and outdoor education activities. However, no guidelines can be expected to cover or predict every eventuality. Leaders must therefore be flexible in their thinking and prepared to adapt or change their plans according to the needs of their group or the situation in which they find themselves. The most important factor in safe and successful off-site activities is the quality of the leadership.

This guidance is issued for all organisations within Surrey County Council. The language and terminology is biased towards schools as the largest user. To have rewritten sections in terminology specific to the youth service or children’s homes would have unacceptably lengthened the document. Groups other than schools are asked to understand this and to accept the spirit of the advice and not be unduly concerned about the terms used. Where there are particular differences between the procedures for schools and other groups, this has been acknowledged as far as possible.

It should be noted that the term off-site activities is employed within these guidelines to embrace all educational visits and outdoor education activities. Certain activities that may be considered to pose a potentially greater element of danger or take place in a potentially dangerous environment are termed ‘hazardous activities’ and ‘areas of high risk’ respectively. Such activities receive special attention within the guidance. It must be remembered, however, that it is rarely the ‘hazardous’ activity that poses the greatest danger to young people. More accidents happen on the roads, in kitchens, etc. than have ever occurred in the outdoors.

There are a number of major changes from previous issues. The two most significant are the introduction of EVCs (Educational Visits Co-ordinators) and the requirement for more detailed, written risk assessments. These are dealt with in detail within Sections 3 and 5.
The purpose and value of off-site activities

It is acknowledged that organising and leading offsite activities puts a great deal of responsibility on all involved. High-profile incidents and reports in the media have certainly increased these pressures. Despite this, the schools and youth groups within Surrey LEA continue to offer a wide range of opportunities for young people. The benefits are immense and make an invaluable contribution to the academic, personal and social development of young people. During EVC training, participants cited the following as some of the reasons why these activities remain so important:

- broadening horizons
- fun
- self-esteem
- decision-making
- relationship building (staff and young people)
- risk taking
- understanding risk
- experiencing new cultures
- raising aspirations
- responsibility
- motivation
- inclusion
- a chance to share
- lifelong leisure activities
- creativity
- independence
- invaluable part of citizenship
- ‘real’ learning
- team building
- consequences related to actions
- allow success
- learning to cope with failure
- living and working with others
- bringing the curriculum alive
- magic moments – memories for life

These positive benefits should be included in any school visits policy (see Appendix P for a model policy).

Risk

It is vital that young people learn to take responsibility for themselves and for others. There has been, in society at large, an increasing move towards risk-aversion and a belief that ‘somebody else’ is responsible for an individual’s safety. Statistics show clearly that the major causes of harm to young people are not off-site activities and journeys but incidents in their everyday lives. Teaching and learning about risk, risk-taking and managing risk are likely to help young people develop and become better equipped to assess the dangers and risks they will inevitably face. To cocoon a young person from all risk makes them more, not less, vulnerable. For this reason it is essential that we involve young people in risk assessments. They should be done with young people, not to them.

It is equally obvious and essential that young people are not exposed to avoidable harm or injury. The level of risk and responsibility must be appropriate to the age, experience and ability of those involved. Activities and styles of supervision must therefore match the participants. Parents and carers must be made fully aware of this so that they can give informed consent to the inclusion of their children.

Where risks inevitably remain, such as with skiing and expeditioning, this must be explained frankly and honestly but balanced by the benefits these activities will bring.

I have been immensely encouraged by the responses of teachers and youth workers during EVC training. There is an outstanding commitment to offsite education, and the dedication and hard work of all involved is very much appreciated. I look forward to continuing to offer support and advice to all who venture off-site.

Alan Cottle
Head of Strategic Risk Management
The guidelines are written in sections to ensure ease of use, and all parties concerned should read at least the chapters indicated in the table below:

<table>
<thead>
<tr>
<th>Part</th>
<th>Section</th>
<th>Relates to</th>
<th>To be read by</th>
</tr>
</thead>
</table>
| 1    | 1 - 9   | All educational visits and outdoor educational activities | Governors  
Headteachers  
Educational Visits Coordinators  
Area Managers (Youth Service)  
Other Managers (C&YP Service)  
Party leaders  
Assistants  
Volunteer helpers |
| 2    | 10-13   | Residential visits  
Visits abroad  
Field studies  
Duke of Edinburgh’s Award | Governors  
Headteachers  
Educational Visits Co-ordinators  
Area Managers (youth service)  
Other Managers (C&YP Service)  
Party leaders  
Assistants  
Volunteer helpers |
| 3    | 14-33   | As applicable to educational visit | Governors  
Headteachers  
Educational Visits Co-ordinators  
Area Managers (youth service)  
Other Managers (C&YP Service)  
Party leaders  
Assistants  
Volunteer helpers |

Further advice can be obtained from:

**Alan Cottle, Head of Strategic Risk Management**

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1 Required levels of approval for off-site activities

1.1 Purpose

The employer is responsible for Health and Safety. For community and voluntary controlled schools and statutory youth groups, the LEA is the employer. For foundation and voluntary aided schools, the employer is the governing body.

Educational visits and outdoor activities should:

- have significant educational value, academic and/or social, and be consistent with the stated aims of both the LEA and the individual institution, including those for outdoor/environmental education or residential experience;
- be suitable to the young people involved having regard to their ages, abilities, needs and aptitudes;
- aim to be inclusive.

For schools

- be related to the school’s established aims and/or curriculum, particularly if the activity is to take place in term time;
- be linked to work within school by preparation and follow-up activities.

For youth groups

- accord with the aims of the youth work curriculum.

1.2 Approval by head of establishment

All off-site activities should have the approval of the head of establishment. The head of establishment should be satisfied with the purpose, planning and proposed staffing for the off-site activity. It should be noted that in this document the head of establishment is the Headteacher for activities organised by a school. For activities organised by the youth service, the Area Manager would be the head of establishment.

It is recommended that the LEA’s Approval Form, Appendix A, is used, even in cases where approval by the authority would not be required.

1.3 Approval by the school governing body or youth service management group

Off-site activities that: (a) take place in a high-risk area, or (b) involve a hazardous pursuit, or (c) involve an overnight stay, or (d) involve a journey by sea or air:

should have the prior approval of the governing body or youth service Area Manager, and this approval should be recorded in the minutes of the relevant meeting. Such approval should be sought well in advance and before non-returnable deposits are paid.

Governors must be given sufficient information in sufficient time to allow them to reach a fair and objective decision. They should be given at least as much information as parents/carers. They should also be kept informed of continuing planning and progress, including any significant changes, up to the point of the journey, and receive a report after its completion.

It is the responsibility of the governing body (or a delegated governor) actively to assure themselves of the soundness of any venture.
1.4 Approval by the LEA

Approval must be obtained from the LEA for off-site activities involving hazardous pursuits or in areas of high risk, all residential journeys and all journeys abroad. The application for approval for educational visits (Appendix A1 - Schools or Appendix A2 - Youth Service) must be completed and sent, together with the information for parents, to the Head of Strategic Risk Management not less than one month before the programme starts and before any monies have been paid that cannot be recovered. The approval will be forwarded in writing to the establishment by the Head of Strategic Risk Management on behalf of the Director of Education.

On all such approved activities, the leaders and helpers of LEA schools and groups will be indemnified by Surrey County Council against any claims for negligence made against them arising from the activity.

NB: This indemnification is for all community and voluntary controlled schools, those foundation and voluntary aided schools that have opted into the SCC insurance scheme and all statutory youth groups.
2 Insurance arrangements for off-site activities

2.1 Off-site activities insurance arranged by Surrey County Council

As part of the insurance package bought back from the County Council, schools and SCC youth groups have an automatic insurance cover for all off-site activities that might be undertaken. Below are detailed the main points of cover provided. Please note that this cover is available to all community and voluntary controlled schools but only to those foundation and voluntary aided schools that have bought back into the package. Schools that have decided to insure elsewhere should satisfy themselves that they hold insurances that match or exceed the scheme outlined below.

**Insurer:** Chubb Insurance Company of Europe

**Policy Number:** 64770398

**Telephone:** 020 7956 5396

**Fax:** 020 7956 5922

**Emergency Medical Assistance:** Mondial Assistance

**Telephone:** + 44 208 666 0644

**Fax:** + 44 208 686 1707

School and youth group travel insurance

The school travel insurance scheme is operated by Chubb Insurance Company of Europe and is free and automatic to schools and SCC Youth Groups buying back insurance from the County Council (see above) so no declaration has to be made. Journeys solely involving members of staff are dealt with under the SCC Corporate Travel Policy. Please contact Pat Barrett on 020 8541 8055 for details.

**Summary of cover**

There is a policy excess of £15.00 per claim.

**Medical:**

Overseas medical expenses and emergency repatriation – expenses up to £5,000,000

Supplementary travel expenses – up to £25,000

**Personal belongings:**

Personal belongings up to £1,500

Single article limit: £500

**Money:**

Money up to £1,500

Cash limit: £500.

**Disruption:**

Cancellation, curtailment and rearrangement – expenses up to £1,500.

**Personal injury:**

Death: £5,000 (pupil or accompanying person under the age of 16)

£25,000 (school teacher/accompanying person over the age of 16)
Permanent disabling injuries: up to £25,000
Temporary total disablement:
- £5 per week (pupil or accompanying person under the age of 16).
- £20 per week (school teacher or accompanying person over the age of 16).

**Personal liability:**
Personal liability up to £2,000,000.

**Claims procedure:**
If a claim is to be made, the insurers should be contacted directly at the following address:
Chubb Insurance Company of Europe
106 Fenchurch Street
London
EC3M 5NA
Tel.: 020 7956 5396
Fax: 020 7956 5922
quoting policy number: 64770398.
A claim form will be sent and the claim will be dealt with between the insurers and the school.

### 2.2 Other insurance provided by Surrey County Council
Employer and Public Liability policies of the County Council automatically apply to any visit.

### 2.3 Alternative sources of insurance
Any school or youth group that does not use the SCC (Chubb) scheme outlined above **MUST** use one that has benefits equal to or better than the above scheme, including emergency medical assistance for visits outside the UK.

Insurance needs will vary according to the nature of the visit. Where appropriate, heads of establishments, the EVC and party leaders should check that they are adequately covered for:

(i) Personal accident cover for party leaders, voluntary helpers and participants.
(ii) Medical treatment
(iii) Higher-risk activities (sometimes excluded from standard policies).
(iv) Damage to or loss of personal or hired equipment.
(v) Programmed as well as non-programmed activities.
(vi) Transport and accommodation expenses in case of an emergency.
(vii) Compensation against cancellation or delay.
(viii) Compensation for loss of baggage and effects.
(ix) Legal assistance in the recovery of claims.
(x) Failure or bankruptcy of the centre or travel company.
2.4 **Winter sports, including skiing, snowboarding and other related activities**

Insurance for these journeys should be arranged through the travel company used, as the cost of the insurance, as a percentage of the total package cost, is very small. The main advantage of this is that the travel agent’s resort representative will be able to assist and the insurance details are likely to be known and accepted by the local services such as doctors, hospitals, ambulances, etc. Any insurance taken must meet or exceed the SCC (Chubb) scheme outlined above.

In certain circumstances the SCC (Chubb) cover may be used. The Risk Management and Insurance Section at County Hall must be consulted on this.

2.5 **Major expeditions abroad, including journeys to remote areas**

Insurance for these journeys should be arranged through the company organising the expedition. As well as all of the aspects of insurance detailed in item 2.3 above, there must be adequate insurance for evacuation of casualties and/or the group. In some circumstances this could be a major undertaking and might require air and ground assistance. The level of insurance cover must adequately reflect this.

2.6 **Information to parents about insurance**

**PARENTS MUST BE INFORMED OF THE NATURE AND EXTENT OF INSURANCE BEING TAKEN OUT ON THEIR BEHALF.**

2.7 **The background to the types of insurance involved**

In the context of off-site activities two forms of insurance are relevant:

(i) **Liability insurance**

This form of insurance covers the group members against claims arising out of negligence being made and subsequently proved in a court of law, by third parties.

Any damages that might be payable in such a situation would be covered by such a policy. A teacher, youth worker or volunteer acting as an adult supervisor on an off-site activity would be covered for such liability by Surrey County Council's third party liability policy.

(ii) **Off-site activity insurance**

This form of insurance provides cover for a series or risks, irrespective of cause. These risks might not be covered by a liability policy and anyway there is inevitably a substantial time delay with liability insurance because of the need to prove the liability. It is additional to and separate from liability insurance.

2.8 **Indemnity forms**

If a school is required to sign an indemnity form in relation to an educational visit, then this should be checked with Risk Management and Insurance Section at County Hall before being signed.

Further advice and guidance is available from the Risk Management and Insurance Section at County Hall (tel: 020 8541 9874).
3 Roles and responsibilities

3.1 Legal responsibilities

All the activities covered in this document take place within a legal framework. Adult supervisors in charge of young people during a visit have a duty of care to make sure they remain safe and healthy. For further information regarding adults’ duty of care, please see section 6.

The following section outlines the roles and responsibilities of the party leader, the educational visits co-ordinator, the head of establishment, supervisory staff and the governing body.

3.2 The party leader

Appointed by the EVC and/or head of establishment, the party leader has overall responsibility for the control and leadership of staff and young people throughout the duration of the visit or journey. They should be appointed on the basis of seniority, personality and experience.

Party leaders should have two or more years’ experience in post. However, it is recognised that for particularly simple activities, e.g. a local visit, the head of establishment might, at his/her discretion, select a less experienced party leader. For local journeys (such as those to and from a local swimming lesson, where a qualified instructor will be in charge), a teaching assistant could be the party leader. For residential journeys and any others where the school staff are in charge of the educational content, the party leader should be a fully qualified teacher. For youth service residential journeys, the party leader must have attended the ‘Residential Planning’ course, organised by the youth service’s Curriculum and Development Unit.

In all cases, the visit can only go ahead if there is a suitable party leader.

The responsibilities of the party leader include:

- Obtaining the appropriate level of approval for every visit or journey;
- Following the LEA and governing body regulations, guidelines and policies;
- Appointing a deputy;
- Ensuring adequate first aid provision is always available;
- Ensuring that all supervisors are carefully chosen;
- Being aware of child protection issues;
- Reviewing each visit, informing the head of establishment and EVC concerning any significant incident or where adjustments might be made;
- Having enough information on the young people proposed for the visit to assess their suitability or be satisfied that their suitability has been assessed and confirmed;
- Stopping the visit or an activity if the risk to the health and safety of party members or members of the public is unacceptable and having a back-up alternative plan in place for such an eventuality;
- Ensuring supervision ratios are appropriate and supervisory practice is good. With regard to good supervision, it is important to consider how it would be affected if a member of staff were for any reason required to leave the party;
• Undertaking all aspects of the planning and preparation, including the preparation of parents, staff and young people via letters and pre-visit briefings. The party leader should also complete a thorough risk assessment, which has taken into account issues raised by their preliminary visit. Further information on preliminary visits and risk assessments can be found in sections 4 and 5 respectively.

• Preparing the staff attending the visit, ensuring that roles and responsibilities have been clearly established for each member of staff; this should also include the nomination of a deputy. Supervisors should be well informed concerning the programme and aims of the visit;

• All staff should be made aware of the emergency procedures and should know how to get hold of the school’s emergency contact. Staff must also have a good knowledge of any medical or special needs the young people may have;

• Developing a programme for the visit that is appropriate to the abilities and needs of the young people, whilst remaining consistent with the school’s aims and objectives.

The above points define particular responsibilities of the party leader, but it must be stressed that the party leader has overall responsibility for all aspects of the journey or visit and as such must be familiar with all the guidance within this document, giving proper consideration to any directions or advice given.

3.3 The educational visits co-ordinator

In many primary, special and some secondary schools, the headteacher may also be the EVC. For the youth service, the EVC is someone who has attended a Residential Planning course.

The EVC’s functions are to:

• Communicate with the LEA to ensure that LEA requirements, including those of risk assessment, are carried out appropriately;

• Support and advise the head of establishment, governing body and party leaders with approval and other decisions;

• Assess, choose, induct and train party leaders and other supervisory adults;

• Ensure that all Criminal Records Bureau disclosures are in place as necessary;

• Ensure the party leader obtains the consent or refusal of parents, having provided complete details of the visit beforehand, such that parents can grant or refuse consent on a fully-informed basis;

• Organise emergency arrangements and ensure that there is a duty officer for each visit;

• Ensure that the party staff understand how to contact the duty officer and other emergency contacts;

• Keep records of individual visits including reports of accidents and ‘near accidents’;

• Review systems and, on occasion, monitor practice;

• Ensure that portable first aid kits are available to groups taking part in off-site activities and that these kits are checked regularly by a designated member of staff.

The EVC should be completely familiar with the responsibilities identified for heads of establishment. It is likely that heads of establishment will delegate to the EVC many of the tasks necessary to perform these duties.
3.4 The head of establishment

In general, the head of establishment is responsible for ensuring that the party leader properly plans and manages visits and journeys. The purpose of the activity should be compatible with the aims of the establishment and form part of a planned, coherent programme. In addition, heads of establishment, in conjunction with the EVC, should ensure that appropriate policy and procedures are in place to give young people the best possible experience in the safest possible way, such as ensuring that the school has a positive policy on inclusion and a clear system for monitoring visits or journeys.

Responsibilities are to ensure that:

- There is appropriate delegation of tasks to the EVC;
- Visits comply with all guidelines and regulations set out by the school and the LEA regarding health and safety;
- The purpose of the activity is appropriate for the group involved;
- The visit’s educational objectives are inclusive and are made known to the relevant parties via the pre-visit documentation;
- The responsibilities laid out for EVCs and party leaders are properly discharged, such as checking that party leaders have completed risk assessments prior to the visit;
- The purpose of the activity is compatible with the aims of the establishment and is part of a planned, coherent programme;
- The EVC selects a suitably competent and experienced party leader, who is qualified to lead the party and of a physical fitness appropriate to the nature of the activity;
- The ratio of supervisors to young people is appropriate;
- There is a system for evaluating all visits and journeys in order that future ventures can be enhanced as necessary. The evaluation should also be used to inform training needs, for which resources should be made available where a need is identified;
- The governing body is aware of all visits and has sufficient information so that it can raise questions and give direction as necessary;
- With the EVC, the risk assessment has satisfactorily responded to all issues raised from all relevant visit information, including preliminary visits;
- School emergency procedures are in place and that these are discussed, evaluated and understood by staff. Parents and carers of young people attending visits and journeys should also be given written details of these procedures. The LEA can advise heads of establishment regarding current emergency procedures;
- Consideration is given to best value in the choice of contractors and types of contracts made;
- Contractors have appropriate emergency procedures and that these will successfully link in with those of the school and LEA;
- A de-brief is carried out with the EVC and party leader following any significant visit or incident. In practice this would include foreign and residential visits or day visits during which an incident occurred;
- There are adequate child protection procedures in place;
- Training needs have been assessed by a competent person and the needs of the staff and pupils have been considered;
• Group leaders have been allowed sufficient time to organise visits properly;
• Time and resources are available for the induction and training of staff and volunteers;
• The LEA or governing body has approved the visit, if appropriate;
• Parents have signed consent forms;
• All party supervisors and the duty officer have the names of all party members with contact details of next of kin;
• Arrangements have been made for the medical needs and special educational needs of all the young people;
• Adequate first aid provision is available;
• The mode of transport is appropriate;
• Travel times out and back are known, including pick-up and drop-off points;
• The address and phone number of the venue to be visited and a contact name are known;
• A duty officer has been nominated and the party supervisors all have contact details and a copy of the emergency procedures;
• Accreditation or verification of providers has been checked;
• A contingency plan (Plan B) exists, covering for example the problems posed by staff illness or the need to alter routes or activities during the visit;
• The consent form carries details of the contingency plan;
• The proper recording and reporting of accidents and incidents takes place. Accident and incident records should be reviewed regularly, and this information used to inform future visits.

In addition, the head of establishment has a number of responsibilities pertaining to emergency procedures and arrangements. These are identified within the Emergency Procedures section of the guidelines.

In situations where it is proposed that the children, relatives or close friends of staff will be with a school/youth group on an off-site activity, there is a risk that a conflict of roles may occur. With this in mind, the role and responsibilities of the leader or any designated supervisor must be made absolutely clear – i.e. that his/her first duty is to the group as a whole. Any adult not accepting this should not be chosen. In particular, heads of establishment should consider the advisability of allowing children of a different age from those in the group to accompany the party. However, a possible solution, where children of staff are involved, might be that a friend or partner might accompany the group and take responsibility for those children only and have no other supervisory role. Such an accompanying adult should meet the full cost of his/her place.

**When a child accompanying a member of staff is not a registered pupil at the educational establishment, the County’s Third Party Liability Insurance will not apply, and appropriate insurance should be taken out privately.**

The head of establishment is recommended to have a de-briefing session with the party leader soon after the group’s return, in order that future off-site activities can be enhanced if necessary.
3.5 Supervisory staff

School staff supervising on visits act as employees of the LEA or the governing body, whether the visit takes place within normal hours or outside those hours, by agreement with the head of establishment and governors. Paid youth workers also act as employees, whether the visit is within or outside their normal working hours. Volunteers acting as supervisors should act and take responsibility in the same way as their school or youth service counterparts.

- Supervisors should follow the instructions of the party leader and ensure a good level of control and discipline amongst the party.
- Supervisors should make the party leader aware of any inability or medical situation that could or would have a significant impact on their ability to supervise effectively.
- Supervisors should consider stopping activities and informing the party leader if they think the risk to health and safety of anyone in the party is unacceptable.

3.6 The governing body

The governing body should ensure that:

- There is a school policy for educational visits (see Appendix P);
- There is a specific and stated objective for every visit;
- The head of establishment/party leader shows how their plans comply with the LEA’s and school’s regulations and guidelines;
- Significant issues or incidents are reported back to the governing body. Governing bodies should challenge the nature of the visit if educational objectives are not inclusive or unclear, or the means to meet these objectives are not realistic or inappropriate for the group concerned. It is not expected that governors should become involved in risk assessments or related planning matters;
- Before bookings are confirmed, the LEA approves visits as necessary;
- Early planning and pre-visits take place such that their outcomes can be properly acted upon;
- Bookings are not completed until external providers have met all the necessary assurances;
- They assess proposals for those types of visits identified for approval by the governing body;
- Guidance is available from the LEA to inform the school’s policies, practices and procedures relating to health and safety of young people on off-site visits;
- An agreement has been reached with the head of establishment, regarding which types of visits they will be informed about and how this will be managed;
- The head of establishment and the EVC have taken all reasonable and practicable measures to include young people with special educational needs or medical needs on a visit.

It is considered good practice for the governing body to allocate time at meetings for the school’s programme of off-site activities to be discussed. An individual governor (or sub-group of governors) should be identified as responsible for receiving and checking details of those journeys for which the governing body is responsible. Details submitted to the governors should be at least as comprehensive as those issued to parents and carers.

The governing body in a foundation or voluntary aided school must accept that it is the employer and that responsibility for Health and Safety rests with it.
4 Planning a visit or journey

All visits, whatever their nature, should be carefully planned. Responsibility for the sound planning and safety of visits and journeys is held by the head of establishment; however, it is recommended that this task be delegated to the party leader running the visit. The EVC should actively support the party leader in this task, offering advice and guidance as necessary. Completed plans should then be submitted to the head of establishment for final approval.

4.1 Planning

It is essential that the party leader has formally completed plans for all visits and journeys, before the day of departure. Party leaders should satisfy their head of establishment that the visit has sound aims and objectives and that these will be met by the proposed visit. The EVC should also be satisfied that the party leader has considered the dangers and problems of the visit and has planned and taken action to reduce them. To undertake this process the party leader should be deemed competent to do so and have relevant experience.

4.2 Initial proposal

This is the first stage of planning and is a basic overview of the visit. The proposal should be submitted to the relevant approval authority and will include information on:

- The aims and objectives;
- The date and duration of the visit;
- The venue;
- The composition of the group, including staff;
- The cost.

The initial proposal for long visits should be submitted well before the beginning of the relevant academic year, even if approval at this stage is conditional.

4.3 The planning process

The following points are key aspects to consider within the planning. Further information regarding them can be found elsewhere in this guidance.

- Staffing and staff training;
- Venue;
- Transport;
- Insurance;
- Programme;
- Emergency procedures and Plan B;
- Communicating with parents/carers and young people;
- Information to and from the provider;
- Qualifications and accreditations;
- Facilities/equipment;
- Kit list;
- Who will pay?
- Consent forms;
- Medical, dietary and special needs;
- Risk assessments;
- Preliminary visits.
When a plan for the visit/journey has been completed, it should be submitted to the head of establishment for approval, and if necessary to the governors and the LEA. Only when all required approval has been given can venues and facilities be hired and charges to parents and carers made. Any charges or voluntary contributions must conform to the school’s and LEA’s charging policies. See Appendix G for sample voluntary contributions letter and Appendix I regarding VAT.

4.4 Preliminary visits

The head of establishment must ensure that, in the case of field studies, museum, farm, adventure and industrial visits, a preliminary visit by the teacher/youth worker is made where the current circumstances of the site are not known to accompanying staff. In all other cases, a preliminary visit is strongly recommended but, where this is not possible, the leader must obtain information on the places to be visited with particular regard to potential hazards. A preliminary visit is an important and legitimate part of planning for any educational visit. As such, reasonable expenses incurred can be charged towards the total cost of the visit, although many companies/activity centres encourage ‘inspection visits’ by offering them at reduced or no cost.

During the preliminary visit, party leaders should keep full, written notes. The visit will help party leaders to gain an intimate insight into the venue, providing them with vital information for risk assessments and operational procedures.

4.5 Aims of the preliminary visit

The purpose of the preliminary visit is to:

- Check that the venue satisfies the aims and objectives of the proposed visit;
- Obtain the names and addresses of schools that have previously used the venue;
- Gain advice from the staff and venue manager;
- Undertake a ‘Site-Specific Risk Assessment’;
- Check that the venue can cater for the particular needs of both the staff and young people;
- Become familiar with the area and surroundings before taking the group there.

4.6 Checking accommodation

Check that the sleeping areas are adequate for the needs of the group. This will obviously vary depending on the accommodation chosen but it should offer:

- Adequate ventilation;
- Reasonable washing and toilet facilities;
- Heating and lighting;
- Enough storage space for personal belongings;
- Sufficient room between bunks or beds to allow easy movement (particularly in the event of an emergency);
- Appropriate escape routes in case of emergency;
- Suitable privacy in sleeping and washing areas.

Permanent centres should also provide a separate area for sick/unwell visitors, and sleeping areas should be clean and tidy.

Check facilities for washing/drying clothes and storing outdoor equipment. Find out about meeting rooms, work bases and evening recreational/relaxation areas.

Ensure that kitchen and dining facilities are sufficient for the numbers involved and, particularly if your group is self-catering, that there are sufficient facilities for safety, health and hygiene.
4.7 Checking activities and the Adventure Activities Licensing Authority (AALA)

For venues charging for the provision of adventure activities, check that there is an up-to-date licence issued by the Adventure Activities Licensing Authority (AALA).

4.8 Special risks on or near the site

Find out about hazardous areas – i.e. chemicals, storage pits or tanks, dangerous animals, water areas, drops/heights etc. These issues should inform the risk assessment.

4.9 Supervision

Party leaders and visiting staff remain responsible for the well-being of their party members at all times, although clearly the centre has a duty here, particularly during activity sessions. Discuss and confirm with the centre staff the level and type of supervision that they will undertake.

In particular, there must be a clear understanding of ‘passing the baton’ – i.e. who is responsible and when. It must be remembered that instructors are responsible for the safe running of an activity. The group supervisors remain responsible for their general welfare.

4.10 Transport and equipment

If centre transport is to be used it must be in a roadworthy condition. If in doubt, press the centre manager for details on maintenance. All equipment used should be adequate for the purpose. If the equipment, even to an untrained eye, appears neglected or deficient, press the centre manager.

4.11 General considerations

If possible, visit the centre when another group is in residence so that the activities can be seen and other party leaders consulted. It is also best to visit at the same time of year as the proposed visit will happen.

Ask for written references from previous groups or, even better, ask for the names and addresses of groups visiting on a specific date the year before. This will enable a random selection of reports.

Remember that whilst safety is obviously paramount, it is also necessary to consider the quality of the programme offered in terms of educational content and participant involvement.

It is, sadly, not uncommon to see safe activities that have little educational value, or where an individual has one go for a couple of minutes and spends the rest of the session uninvolved, at best watching the others.

Collect promotional material and take photographs, which can later be used to recruit, inform other staff or be displayed at a parents’ meeting.

Finally, on return, confirm any verbal arrangements in writing and inform your head of establishment how the preliminary visit went and what impressions and knowledge you have gained.
### 4.12 Preliminary visit check list

<table>
<thead>
<tr>
<th>Question</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Have you met the venue manager or other senior staff member?</td>
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<tr>
<td>If appropriate, have you seen and taken a copy of the organisation’s AALA licence or checked it on the AALA website?</td>
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<tr>
<td>If appropriate, have you seen copies of the organisation’s risk assessments, operating procedures, staff qualifications and equipment?</td>
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<tr>
<td>Have you looked around the venue identifying potential risks on or near the site?</td>
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<tr>
<td>Have you confirmed with the organisation the type and level of supervision they will undertake?</td>
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</tr>
<tr>
<td>Are there proper arrangements for party members with special educational needs?</td>
<td></td>
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<tr>
<td>Are there proper arrangements for party members with special medical needs?</td>
<td></td>
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<tr>
<td>Have you agreed a programme with the organisation, confirming when and what responsibilities the organisation staff will have, regarding supervision and activity provision?</td>
<td></td>
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<tr>
<td>Are there proper dining arrangements?</td>
<td></td>
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<tr>
<td>Are there sufficient first-aid kits and trained personnel at the venue?</td>
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<tr>
<td>Are there suitable emergency procedures, including fire exits, muster points, roll-calls and search procedures?</td>
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<tr>
<td>Have you checked the organisation’s transport?</td>
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<tr>
<td>Have you checked the accommodation is ‘fit for purpose’?</td>
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<tr>
<td>Have you seen the organisation running activities for another similar party?</td>
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<tr>
<td>Do the agreed activities have appropriate educational value?</td>
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<tr>
<td>Is the venue within easy reach of other sites to be visited?</td>
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<tr>
<td>Has an alternative, back-up programme (Plan B) been agreed with the venue?</td>
<td></td>
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<tr>
<td>Has their insurance been checked?</td>
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<tr>
<td>Does the LEA know the venue?</td>
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</tbody>
</table>

### 4.13 Planning for young people with special needs

Although an establishment will already be aware of any young person's special needs, visits and journeys will present new challenges.

The party leader should give young people with special needs careful consideration; with particular thought for any special difficulties a young person may have and how these may influence the risk assessment. If an external contractor is being used, then it is important that they are made completely aware of any individual’s limitations and difficulties well before the visit’s departure date. External contractors may also have considerable experience running activities for young people who have special educational needs, therefore their advice should be carefully considered when completing the risk assessment.
It must be stressed that every reasonable effort should be made to include all young people in journeys and visits. However, as stated elsewhere in this document, it is not expected that the needs of an individual young person should be accommodated to such an extent that the purpose and value of the visit is significantly undermined.

Any limitations and difficulties that young people have should be considered early in the planning stage and when carrying out the risk assessment. The following factors should be considered:

- wheelchair access and/or whether manual-handling skills will be needed
- whether the activity will be of benefit to the young person
- if the activity can be easily adapted to fit the needs of the young person
- additional or different resources that might be necessary
- whether any extra supervision will be necessary.

The needs of young people with special needs are best served by a supervisor who knows them well. That supervisor is therefore capable of making informed decisions when adapting the activities.

### 4.14 Special medical needs

The Surrey County Council guidance *Pupils’ Health and the Administration of Medicines* should be referred to. See also DfES publication *Supporting Pupils with Medical Needs*.

The risk assessment should take into account and put in place control measures to ensure the safety of young people with special medical needs. It is important to ask the parents or carers to provide complete details of these needs well before the departure of the visit or journey. Parents or carers should provide:

- Details of medical conditions;
- Where there are known medical conditions there should be a prepared individual treatment plan;
- Emergency contact details;
- The young person’s doctor’s name, address and phone number;
- Written details of any medication required (including instructions on dosage/times) and permission to administer;
- Permission, if appropriate, for the young person to administer their own medication, or for a volunteer supervisor to administer;
- Details of any allergies/phobias;
- Details of any special dietary requirements;
- Details regarding any toileting difficulties;
- Special equipment or aids for daily living.

Although it is acknowledged that nobody can be obliged to administer medications, give first aid or carry out routine medical procedures, it is sincerely hoped that supervisors will be prepared to do this, so that an individual is not further disadvantaged or penalised. Where necessary, appropriate training must be provided – e.g. in using an Epipen.
4.15 Visit or journey planning check list

The following checklist may prove useful in the planning and administration of an educational visit, but it must not be used in isolation and the relevant sections of the guidelines must be read in full.

Simple day visits not requiring transport or involving hazardous activities may not need to be processed in this way but the list may still prove useful as an ‘aide memoire’.

‘Who’ is the most appropriate person to perform the task, not necessarily the party leader. A name or initial should be used.

‘When’ indicates when the task needs to be completed.

‘Done’ shows that the task has been carried out – the box should be dated.

<table>
<thead>
<tr>
<th>Initial planning</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>Have the aims and objectives been set?</td>
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<tr>
<td>Will the visits, aims and objectives be linked to part of a structured programme of classroom learning, prior to and following the visits?</td>
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<tr>
<td>Has the date been initially identified?</td>
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<td>Has the venue been initially identified?</td>
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<tr>
<td>Has the composition of the group been identified?</td>
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<tr>
<td>Have the supervisory requirements been identified?</td>
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<tr>
<td>What is the cost and who will pay?</td>
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<tr>
<td>Initial approval from EVC and head of establishment.</td>
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<table>
<thead>
<tr>
<th>The venue</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>Has a venue been chosen, having considered best value, soundness of reputation and its ability to meet the aims and objectives?</td>
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<thead>
<tr>
<th>The preliminary visit</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>Has a preliminary visit been undertaken?</td>
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<tr>
<td>Has the checklist been completed if appropriate?</td>
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<thead>
<tr>
<th>Risk assessments</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>Has a satisfactory risk assessment been completed?</td>
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<tr>
<td>Have the young people been involved in the risk assessment?</td>
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<tr>
<td>Have all outcomes of the risk assessment been shared with all appropriate members of the party?</td>
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<tr>
<td>If appropriate, has the risk assessment been approved by the LEA?</td>
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<tr>
<td>Have any contractors’ risk assessments been checked by the Adventure Activities Licensing Authority or the LEA?</td>
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<thead>
<tr>
<th>Staffing</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>Have staff been identified and booked?</td>
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<tr>
<td>Are the members of staff capable of meeting any special needs that might be in the party?</td>
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<tr>
<td>Do staff need any special training or qualifications?</td>
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<tr>
<td>Is there an appropriately trained first-aider available to the party at all times?</td>
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<tr>
<td>Have all supervisors understood and agreed their roles and responsibilities with the party leader?</td>
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<tr>
<td>Has a hierarchy been put in place and made clear to all in the party?</td>
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<tr>
<td>Have all staff signed a medical disclosure form identifying any medical needs they have?</td>
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<tr>
<td>Have all Criminal Records Bureau checks been satisfactorily completed?</td>
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<tr>
<td>Has a duty officer been identified?</td>
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<tr>
<td>Preparing young people</td>
<td>Who</td>
<td>When</td>
<td>Done</td>
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<td>------------------------</td>
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<tr>
<td>Have the young people been involved in the preparation and planning of the visit?</td>
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<tr>
<td>Do the young people know what standard of behaviour is expected of them?</td>
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<tr>
<td>Do the young people know any rules and regulations they must adhere to?</td>
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<tr>
<td>Do the young people know who their leaders are?</td>
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<tr>
<td>Have the young people been properly prepared, trained, qualified and tested to undertake the planned activities?</td>
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<tr>
<td>Do the young people possess hidden identity cards?</td>
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<tr>
<td>Do they know what to do if lost or separated?</td>
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<tr>
<td>Do they know what to do if approached by a stranger?</td>
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<tr>
<td>Have pocket money limits been identified?</td>
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</table>

<table>
<thead>
<tr>
<th>Preparing parents and carers</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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</thead>
<tbody>
<tr>
<td>Are parents and carers fully aware of what all aspects of the visit entail, including cost, timings, venue and activities?</td>
<td></td>
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<tr>
<td>Have parents and carers given informed consent for all activities to take place?</td>
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<tr>
<td>Have parents and carers disclosed medical details and given medical consent?</td>
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<tr>
<td>Have parents and carers given consent to use the various methods of transport involved?</td>
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<tr>
<td>Have parents and carers attended a pre-visit briefing and question-and-answer session?</td>
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<tr>
<td>Has dietary information been gained?</td>
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<tr>
<td>Are parents and carers aware of the kit list?</td>
<td></td>
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<tr>
<td>Has a phone tree been set up to communicate with parents and carers?</td>
<td></td>
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<tr>
<td>Does the party leader have emergency contact details for all parents and carers for the duration of the visit?</td>
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</table>

<table>
<thead>
<tr>
<th>Health and general welfare</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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</thead>
<tbody>
<tr>
<td>Has first aid been considered as part of the risk assessment?</td>
<td></td>
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<tr>
<td>Has appropriate first aid equipment been brought on the visit?</td>
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<tr>
<td>Are designated supervisors aware of and suitably trained to administer young people’s medication?</td>
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<tr>
<td>Have all young people’s medicines been collected and clearly labelled?</td>
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<tr>
<td>Are dosages and timings for medicines clearly understood?</td>
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<tr>
<td>Do you have the contact details of local doctors and hospitals?</td>
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<tr>
<td>Do all party members have the appropriate clothing for either cold or very hot conditions?</td>
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<table>
<thead>
<tr>
<th>Equipment</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>Has a kit list been issued to the young people?</td>
<td></td>
<td></td>
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<tr>
<td>What equipment should the school/youth group take – including party and leader equipment?</td>
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<tr>
<td>What equipment will the contractor provide?</td>
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<tr>
<td>First aid kit(s)?</td>
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<table>
<thead>
<tr>
<th>Transport</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>What are the transport needs?</td>
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<tr>
<td>Obtain quotes (reputable rather than cheapest).</td>
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<tr>
<td>Check insurance.</td>
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<tr>
<td>Has transport been finally agreed and booked?</td>
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<tr>
<td>Have the relevant public transport services been made aware where and when your party will be travelling with them?</td>
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<tr>
<td>If parents’ cars are used, have they confirmed that they possess adequate insurance, tax, and MOT, where appropriate?</td>
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<tr>
<td>Is there back-up transport in the event of an emergency or a breakdown?</td>
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<table>
<thead>
<tr>
<th>Hazardous activities and higher-risk environments</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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</thead>
<tbody>
<tr>
<td>Has approval been sought from the LEA?</td>
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<tr>
<td>Have the activities been checked by the Adventure Activities Licensing Authority?</td>
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<tr>
<td>Has someone (usually the LEA) checked activities not covered by the Adventure Activities Licensing Authority?</td>
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</table>
### Guidelines for Educational Visits and Outdoor Activities

<table>
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<tr>
<th>Finance</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>Costing (produce)</td>
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<tr>
<td>Communicate to parents</td>
<td></td>
<td></td>
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<tr>
<td>Collection schedule – devise</td>
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<td></td>
<td></td>
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<tr>
<td>Collection schedule – communicate</td>
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<tr>
<td>Receipts – start</td>
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<tr>
<td>Receipts – end</td>
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<tr>
<td>Bursary</td>
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<tr>
<td>Account/Balance sheet</td>
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<tr>
<td>Refunds – calculate/give out</td>
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<tr>
<td>Pocket money – calculate</td>
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<tr>
<td>Pocket money – communicate</td>
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### Insurance

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<thead>
<tr>
<th>Insurance</th>
<th>Who</th>
<th>When</th>
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<tbody>
<tr>
<td>Check cover for visit</td>
<td></td>
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<tr>
<td>Communicate level of cover</td>
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### Communications

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<thead>
<tr>
<th>Communications</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>Plan schedule of communications</td>
<td></td>
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<tr>
<td>Emergency communications (plan and tell parents)</td>
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<tr>
<td>Mobile phone for party leader?</td>
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### Accommodation (where appropriate)

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
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<tbody>
<tr>
<td>If centre has not been used before, describe and confirm suitability with head of establishment</td>
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<tr>
<td>Check if hot water/showers</td>
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<td>Fire drills and procedures</td>
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<td>Fire exits</td>
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<tr>
<td>Local Authority Registration check (if one exists)</td>
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### Environment

<table>
<thead>
<tr>
<th>Environment</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out of bounds areas identified</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communicated?</td>
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<tr>
<td>Marked?</td>
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</tr>
</tbody>
</table>

### General

<table>
<thead>
<tr>
<th>General</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-site phone numbers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24-hours contact number for site</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Approval – received from:

<table>
<thead>
<tr>
<th>Approval</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head of establishment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EVC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Governors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEA</td>
<td></td>
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</tr>
</tbody>
</table>

### Post-course evaluation

<table>
<thead>
<tr>
<th>Post-course evaluation</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
</tr>
</thead>
</table>

| | | | |

### Tips for future visits

<table>
<thead>
<tr>
<th>Tips for future visits</th>
<th>Who</th>
<th>When</th>
<th>Done</th>
</tr>
</thead>
</table>
5 Risk assessments

Legal requirement

It is a legal requirement for employers to assess the risks of activities, to put in place measures to control and reduce those risks, and to inform employees about these measures.

In practice, written risk assessments are required for every journey and visit. It is important that establishments build up a portfolio of risk assessments to which they can refer and update when a visit or journey is repeated. See Appendix H for a Risk Assessment template.

Who should carry out the risk assessments?

It is the party leader’s responsibility to complete the risk assessment, although they should be able to receive considerable support from the EVC.

It is not necessary for party leaders to undertake the risk assessment of activities run by external providers; however, it is essential that the AALA or the LEA check providers’ risk assessments.

Frequent visits

Frequent visits, such as to the local library or swimming baths, do not need a new risk assessment each time; however, if the circumstances of the visit change at all then the risk assessment should be updated in the light of these changes.

How to carry out a risk assessment

A risk assessment is a considered evaluation of potential hazards and the level of risk associated with them. The aim is to identify how the hazard and risk can be controlled and reduced so that people do not suffer injury or illness. It is vital that, once identified, the control measures are understood and implemented by those involved.

The key elements of a risk assessment are:

5.1 Identifying significant hazards

Consider the activity and look for what could reasonably cause harm. Bear in mind that what is a safe situation for one person may be extremely dangerous for another. Below is a list of points that should be considered when looking for hazards:

(i) The nature and location of the journey or visit;
(ii) Transport and route issues;
(iii) Equipment standards and their suitability;
(iv) Special educational or medical needs;
(v) Staff ratios, qualifications, experience and competence;
(vi) The composition of the group, including age, sex and ability;
(vii) Weather conditions;
(viii) How changing circumstances will affect the risk assessment.

A risk assessment should not contain trivial or highly unlikely risks, only those that are reasonably likely to happen and cause harm. To do this, try to look afresh at the situation and gain the views of both the experienced and inexperienced. Lastly imagine how the hazards may change as circumstances alter. Consider the ‘What if…?’ scenario.
5.2 Establishing who is at risk

Consider who could be affected by the activity:

(i) Young people;
(ii) Visitors;
(iii) Leaders and supervisors;
(iv) The general public.

Pay particular attention to:

(i) The very young;
(ii) The inexperienced;
(iii) Anyone with a medical condition;
(iv) People with special needs;
(v) Those alone or remote;
(vi) Anyone who might be vulnerable.

5.3 Evaluating and implementing control measures

Consider how likely the hazard is to cause harm, using the categories High, Medium and Low. The aim is now to decide what control measures can be put in place to reduce the risk as much as possible so that it can be described as Low. Control measures should be considered based on these two questions:

(i) Can I get rid of the hazard altogether?

(ii) How can I control the risks so that harm is either unlikely or reduced to an acceptable degree, given the nature of the activity?

NB: It is important to be honest when answering these questions. For example, an activity such as skiing carries with it certain inherent risks, some of which cannot be removed.

Consider the following control measures:

- Referring to existing guidance.
- Ensuring information is shared and understood.
- Specific training.
- Good supervision and appropriate ratios.
- Proper emergency procedures.
- Appropriate ethos.
- Suitable first aid provision.
- Site-specific controls.
- Cancelling or cutting short.
- Reducing risk as far as reasonably practicable.

5.4 Recording risk assessments

It is a legal requirement to record and keep risk assessments. It needs to be shown that:

(i) A proper check was made.
(ii) Those who might be affected were considered.
(iii) Action was taken to deal with all the significant hazards.
(iv) The precautions were reasonable and the remaining risk was low.

Ultimately this information must be available, as it could be required by a court of law.

5.5 Reviewing risk assessments

A risk assessment needs to be a ‘living’ document, constantly being improved and updated in the light of new experiences and practice. The risk assessment should be reviewed:

(i) Every time there is a change to the activity, type of group, location, etc.
(ii) Every time a group returns from a journey or visit. The assessment need not be extensive but should cover any safety aspect of the visit or journey that could be reasonably improved.

(iii) Every time there is a 'near-accident'. A 'near-accident', can be simply defined as an incident that almost happened and which would have resulted in injury or harm.

5.6 Involving young people in risk assessments

Young people involved in risk assessments are likely to have a safer, more responsible approach to off-site activities and will have improved the risk management skills essential for adult life.

- All risk assessments that young people undertake should be finally checked and agreed by an appropriate adult competent to do so.
- Care must be taken to make parents and carers completely aware of the real risks young people will be involved in.

It is sound practice to involve all young people in risk assessment and risk management to a degree that is appropriate to their age, experience and abilities.

Young people should learn to identify risks and be encouraged to decide on ways to manage those risks. As an example, very young children are taught about the dangers of traffic and crossing the road and learn about the Green Cross Code. Similarly, they learn about germs and hygiene and should be encouraged to apply this knowledge to off-site activities such as farm visits.

Older students involved in off-site activities should identify risks relevant to their situations and be encouraged to develop risk-control measures. Examples of this might include getting lost or separated and being in remote locations with distant supervision (such as the Duke of Edinburgh’s Award Scheme).

In short, risk assessment and risk management is not done to participants, but with them.

5.7 Three levels of risk assessment

A good risk assessment consists of three levels: a generic assessment, a site-/visit-specific assessment and an on-going assessment. These are covered in detail below.

5.8 Generic risk assessments

The LEA has risk-assessed a comprehensive list of activities and has produced operating procedures covering the general safety issues of each (see Section Three). The procedures identified are appropriate to the activities whenever and wherever they take place, and are for party leaders to use as a basis for running the activity. It is recommended, however, that party leaders do not rely solely on the LEA’s generic operating procedures: rather they should undertake their own risk assessments to become familiar with the activities’ risks. Where activities fall outside the scope of these guidelines, a preliminary application should first be submitted to the LEA for further guidance and advice.

Generic risk assessments apply to the particular activity wherever it takes place. For example, there will be some potential risks associated with an urban study such as roads, getting lost or separated, being approached by strangers, etc. that will apply in all cases. A generic risk assessment identifies these and their control measures.

Similarly, adventure activities such as rock-climbing involve potential risks that are common to any rock-climbing event. The yellow section of this guidance can be used for generic risk assessments. The guidance need not be re-interpreted but must be understood, shared and followed.
5.9 Event Specific risk assessments

This type of assessment should be undertaken by a person trained and competent to assess risks. This is usually the party leader or someone acting on their behalf, such as the EVC. By their very nature, generic risk assessments cannot take into account the individual risks and hazards of every situation. Therefore visit/site-specific assessments must be made to ensure that risks peculiar to that journey or visit are as low as reasonably practicable. It is important that these assessments, while informing the school’s policies and procedures, should remain consistent with those of the LEA.

5.10 On-going risk assessments

Throughout the duration of the visit the party leader and the other supervisors should be continually reassessing the risks. This reassessment should be based on the generic and site/visit-specific assessments and should take account of local expertise on factors such as changing weather or tides. The need for on-going risk assessments is outlined in the following examples:

- Emergency situations can be unforeseeable and therefore control measures may not have been definitively formed prior to the incident. It is down to the experience and expertise of the party leader and supervisors to quickly establish the nature of the emergency, who is at risk and what control measures should be put in place to prevent harm to members of the group.

- Changes to the group, such as tiredness, illness or misbehaviour, or a change in the weather, may require an alteration to the programme or a switch to Plan B.

Party leaders should trust their professional judgement and understanding of their young people. Ultimately the party leader is responsible for the group and should be able to use their own judgement to cancel or alter hazardous activities, even if contracted activity leaders are running them.

5.11 Significant hazards

Although no attempt is made here to identify the specific problems that have led to high-profile accidents and tragedies, some significant contributing factors are clear.

- Water has been the most common cause of fatal accidents on offsite activities. Particular care must be taken in or near water.

- Activities that have not been thoroughly risk-assessed and prepared for pose significant risks. It is clear, therefore, that spur-of-the-moment, opportunist decisions – for instance, to go swimming – are not acceptable. Ensuring that all potential opportunities have been thoroughly explored beforehand can mitigate any lack of spontaneity that might result. This again is evidence of the need for the preliminary visit.

- Accidents have happened where no contingency plan has been pre-organised. Where a supervisor feels they have no alternative, they are more likely to carry on with an activity, in spite of an increased risk. A vital control measure when reducing the risk of an activity is that of being able to abandon it and take up another more appropriate activity if necessary. Risk assessments must also be done for the contingency programme.

- Local advice and expertise have either not been sought or acted upon.

- The competence or qualification of the leaders has not always been sufficient to recognise and understand the nature of the hazards involved.

- There has been a lack of understanding between ‘real’ and ‘apparent’ danger.
### 5.12 Example 1 – Residential Risk Assessment

<table>
<thead>
<tr>
<th>Hazards</th>
<th>Who is at risk?</th>
<th>Control measures</th>
<th>Review</th>
</tr>
</thead>
</table>
|**Coach journey**| All| • Seatbelts provided, staff to check, remain seated at all times.  
• Regular checks to ensure seatbelts remain fastened.  
• Staff dispersed throughout the coach  
• SCC Guidelines| | |
|Fully self-sufficient accommodation, (country cottage)| All| • Fire exits checked  
• Fire drill and briefing soon after arrival.  
• Play field| • Check for animal faeces and other dangerous objects; clear if possible/as necessary.  
• Ensure children wash hands following activities in the field.  
• Ensure that clearly defined boundaries are understood by all.  
• Establish ‘return to accommodation’ signal (whistle or bell).| |
|Bunk house| | • Limit access to avoid bullying, individuals being alone or general mischief.| |
|**Cooking and food preparation**| | • Limit numbers to no more than 3 young people assisting in the kitchen at once.  
• Give only basic, safe tasks to group members; none that involve using the oven.  
• Ensure hands are thoroughly cleaned before and after working in the kitchen.  
• Do not allow those working in the kitchen to also lay-up.| | |
<table>
<thead>
<tr>
<th>Hazards</th>
<th>Who is at risk?</th>
<th>Control measures</th>
<th>Review</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Tasks</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Injury through lifting/moving objects</td>
<td></td>
<td>• Provide only simple tasks that do not require any heavy lifting or use of dangerous chemicals.</td>
<td></td>
</tr>
<tr>
<td>• Cuts and burns from washing up.</td>
<td></td>
<td>• Adults to wash kitchen knives, etc.</td>
<td></td>
</tr>
<tr>
<td>• Ensure water temperature is appropriate.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Visit to local castle</strong></td>
<td>All</td>
<td>• Arrange visit prior to arrival.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Take official tour.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Listen to and apply/enforce safety briefings and notices.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Operate in clearly defined sub-groups in different areas of the castle.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Limit numbers of children in any confined area, such as steps, battlement ledges and anywhere there is the possibility of a fall.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Enforce single file as appropriate and avoid rushing or overtaking.</td>
<td></td>
</tr>
<tr>
<td><strong>Swim in local lake</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• General</td>
<td>All</td>
<td>• Follow SCC guidelines on swimming.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Have appropriately qualified lifesaver present.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Only allow sub-groups of 10 or less to be in or near the water at any one time.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Have designated supervisors in the water and watching from the shore.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Have a defined and understood swimming area.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Have a clear and understood signal for the ending of sessions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Carry out regular head-counts.</td>
<td></td>
</tr>
<tr>
<td>• Cool water</td>
<td>All</td>
<td>• Reduce time spent in water.</td>
<td></td>
</tr>
<tr>
<td>• Stony bed</td>
<td>All</td>
<td>• All participants must wear training shoes.</td>
<td></td>
</tr>
</tbody>
</table>
### 5.13 Example 2 – Farm visit Risk Assessment

<table>
<thead>
<tr>
<th>Hazards</th>
<th>Who is at risk?</th>
<th>Control measures</th>
<th>Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infection and poisoning</td>
<td>All</td>
<td>• Follow SCC Farm visit guidance (10.7)</td>
<td></td>
</tr>
<tr>
<td>Machinery, slurry pits, ponds,</td>
<td>All</td>
<td>• Effective supervision.</td>
<td></td>
</tr>
<tr>
<td>etc.</td>
<td></td>
<td>• Appropriate supervisory ratios.</td>
<td></td>
</tr>
</tbody>
</table>
### 5.14 Example 3 – Year Nine visit to London

**Risk Assessment for:** A Year Nine Visit to the London Transport Museum

<table>
<thead>
<tr>
<th>Name</th>
<th>Headteacher</th>
<th>Organisation:</th>
<th>A Secondary School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment undertaken (date)</td>
<td>Signed</td>
<td>Date</td>
<td>Review date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hazards</th>
<th>Who is at risk?</th>
<th>Control measures</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Coach Journey</strong></td>
<td>All</td>
<td>• Seatbelts should be provided and used by all. Staff should check they remain fastened at all times. See Surrey guidelines regarding transport.</td>
</tr>
<tr>
<td><strong>London</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• General</td>
<td>All</td>
<td>• Party briefing regarding what to do ‘If Lost’.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Hidden identity cards, with days programme, contact details, etc.</td>
</tr>
<tr>
<td>• The general public</td>
<td>All</td>
<td>• Stay in open public places, avoid back alleys, etc.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ensure that party members are polite and do not appear threatening; maintain as small groups as possible.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Avoid anyone who appears threatening.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Supervisors to monitor other members of the public with a view to spotting potential problems.</td>
</tr>
<tr>
<td><strong>The Underground</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Becoming separated / lost / abducted</td>
<td>All</td>
<td>• Young people to remain in separated manageable groups with their supervisor,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Regular ‘face to face’, register checks, especially when boarding and exiting the tube train and underground station.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Effective supervision.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Appropriate supervisory ratios.</td>
</tr>
<tr>
<td>• Falling off the platform</td>
<td>All</td>
<td>• Party to stay in tight groups at back of platform until</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• directed to board.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Group leaders to enter and exit tube train first, ensuring whole group follows and they all ‘Mind the Gap’.</td>
</tr>
<tr>
<td>• Escalators</td>
<td>All</td>
<td>• Groups should be asked if they are ‘happy/ready to take the escalator?’</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Whole group takes escalator together.</td>
</tr>
<tr>
<td>Hazards</td>
<td>Who is at risk?</td>
<td>Control measures</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Covent Garden                 | All            | • Maintain well-organised groups, easily distinguishable from other members of the public.  
• Enter shops in small numbers only, with supervisors in each shop entered.  
• Ensure group members only have cheap cameras and other ‘Hi-Tech’ equipment, so pickpockets are discouraged.  
• Avoid standing still watching street performers for long periods of time. |        |
| The London Transport Museum   | All            | • Arrange visit with the museum.  
• Take official tour and ensure group members have appropriate exercise to occupy them.  
• Evaluate any rides and establish ground rules if necessary.  
• Wherever groups operate under more remote supervision, ensure they are in threes or fours.  
• Operate a reporting system where groups should check in from time to time.  
• Remind party members they should not exit the museum except with the whole party. |        |
| River boat cruise             | All            | • Boat cruise to be pre-booked, preferably with an area specially designated for the whole party.  
• Everyone to listen to safety announcements.  
• Supervisors to be at front and rear of group when boarding and leaving the boat. |        |
### 5.15 Example 4 – River Study

**Risk Assessment for:** A Year 8 River Study

<table>
<thead>
<tr>
<th>Name</th>
<th>Classroom Teacher</th>
<th>Organisation:</th>
</tr>
</thead>
</table>

#### Assessment undertaken (date) | Signed | Date | Review date

<table>
<thead>
<tr>
<th>Hazards</th>
<th>Who is at risk?</th>
<th>Control measures</th>
<th>Review</th>
</tr>
</thead>
</table>
| River study (slow moving and less than 0.15m deep, 10m wide)           | All             | • Issue clear briefing, including rules.  
• Operate in distinct sub-groups, with identified leaders.  
• Have a clear and understood signal for the ending of sessions.  
• Carry out regular head-counts.                                                                                          |        |
| • General                                                              | All             | • All participants must wear training shoes.                                                                                                                                                           |        |
| • Stony bed                                                            | All             | • Confirm with river authority when to undertake the study.  
Consider weather conditions and weather forecast, especially rain.                                                      |        |
| • Dam-controlled river, liable to flooding.                           | All             | • Prevent ‘horse-play’, and provide changes of clothes and towels.                                                                                                                                 |        |
| • Falling in.                                                          | All             | • Seek advice from river authority.  
• Put plasters over any scratches and wash hands after activity, and other wet parts as soon as possible.                                           |        |
| • Water-borne diseases and pollutants                                  | All             | • Deny access and consider any debris floating down.                                                                                                                                                  |        |
| • Shallow rapids section 30m upstream.                                 | All             |                                                                                                                                                                                                          |        |

**NB:** The following points are common to all of the risk assessments:

- All adults accompanying the visit will meet to address all issues arising from the above risk assessment.
- Guidance from ‘Guidelines for Educational Visits and Outdoor Education Activities’ has been followed.
6 Supervision

6.1 Legal responsibilities
All the activities covered in this document take place within a legal framework. Adult supervisors in charge of young people during a visit have a duty of care to make sure they remain safe and healthy.

6.2 The duty of care
Adult supervisors in charge of young people during a visit are considered to be ‘in loco parentis’. They have both a duty of care towards those young people and a common-law duty to act as a reasonable, prudent and careful parent would in similar circumstances. Adult supervisors should not hesitate to act in an emergency and to take life-saving action in an extreme situation.

In exercising the duty of care and interpreting the meaning of ‘reasonable, prudent and careful’, common sense should be applied. Those involved should:

- Try to think as a parent might think in similar circumstances;
- Consider whether they would be able to justify what is proposed to professional colleagues whose judgement they respect and, ultimately, a court of law;
- If they are in doubt they should not go ahead until they have sufficient further information and advice to remove the doubt.

6.3 Voluntary supervisors and adult helpers
The principle of in loco parentis applies to all who take responsibility for the children of others, but the law would be likely to expect a higher standard of care from professionals because of their training and experience.

6.4 Young people aged eighteen and over
With young people in this category the principle of in loco parentis does not apply as such, but those responsible for them should assume the same duty of care towards them as they would to under-eighteens.

6.5 Outside agencies
Where an activity involves the use of the resources or expertise of an establishment or organisation other than that of the school, the party leader must make all reasonable efforts to ensure that the agency involved is competent and any establishment safe.

Contracted staff can never be left in sole charge of a group of young people. Whilst contractors clearly have their own responsibilities towards young people, SCC will always retain a ‘duty of care’ towards the young people and can therefore never hand the job of supervision over to a contractor.
6.6 Supervisory responsibilities

6.7 Heads of establishment

Heads of establishment have the responsibility for determining the number of school staff or youth workers required to supervise any off-site activity. They should also work with the EVC to appoint a competent and qualified party leader to be in charge of the activity.

6.8 The educational visits co-ordinator

EVCs should take a lead role in establishing good supervisory practice for all journeys and visits. They should:

- Advise the head of establishment about potential party leaders and supervisory ratios;
- Support party leaders with advice for good supervisory practice and ratios;
- Ensure that Criminal Records Bureau disclosures have been completed for supervisors as appropriate.
- Assist and advise the party leader about risk assessment and risk management.

6.9 The party leader

The party leader should take overall responsibility for the group at all times during the visit or journey. Where there is more than one school involved an overall group leader should be identified, usually the person with the most experience in leading such visits. In addition the party leader should:

- Liaise with both the head of establishment and the EVC to establish appropriate staffing ratios and other issues of good supervisory practice.
- Ensure that all adult supervisors understand their roles and responsibilities at all times. It is good practice to hold a pre-visit meeting where roles can be discussed, agreed and put in writing.
- Ensure that all reasonable safety precautions, both those described in this guidance and those dictated by common sense are properly carried out. Additional particular arrangements may need to be made for any young person requiring extra supervision and care.
- Ensure that reconnaissance is undertaken immediately on arrival. Proposed arrangements for supervision must be reviewed in the light of prevailing conditions and allowances made for the possibility that conditions may change.
- If working on or near water, pay particular attention to levels of supervision and the availability of expertise in water safety and life-saving techniques. It is worth noting that many recent school visit tragedies have involved water.
- Be aware of any sites to be visited that may be in any way sensitive, including places of worship, environmentally sensitive areas, etc. The group should also be briefed appropriately.
- Remember that most accidents happen in normal or everyday situations such as in the kitchen, on stairs or on roads, and party leaders should brief their groups accordingly.

On all visits the party leader’s responsibility extends from the agreed start time to the time at which the party leader returns the young people to the parent/carer. On returning, the party leader should check that all young people are safely returned to a parent/carer or other known responsible adult.
6.10 The governing body

The governing body should ensure that the above roles are carried out in accordance with LEA guidance and that the guidance is readily available to the school.

6.11 Use of parents and volunteers

- Parents and volunteers may be used to enhance the supervision of school visits and off-site activities. They should be carefully selected and ideally well known to the school and to the young people. It is important to note that the legal principle of 'in loco parentis' applies to all adults who take charge of the children of others, although the law would be likely to expect a higher standard of care from professionals because of their training and experience.

- In situations where it is proposed that the children, relatives or close friends of staff will be with a school/youth group on an off-site activity, there is a risk that a conflict of roles may occur. With this in mind, the role and responsibilities of the leader or any designated supervisor must be made absolutely clear, i.e. that his/her first duty is to the group as a whole. Any adult not accepting this should not be chosen.

6.12 Vetting suitability

- The EVC with the head of establishment and the party leader should assess the suitability of all volunteers at an early stage of planning.

- All parents and volunteers helping on residential visits MUST be CRB-checked.

- Where there is any doubt about the suitability of an adult supervisor, the adult should not be allowed to help supervise the visit. Heads of establishment should not hesitate to act upon their own judgement, even if someone has been CRB-checked.

- For the protection of both adults and pupils, adult supervisors should ensure they are not alone with a pupil wherever possible.

- All volunteers and parents, who are likely to have regular contact with children, should be checked by the Criminal Records Bureau. Those helpers who only come into contact with children from time to time do not need to be CRB-checked; however, they MUST NEVER be left alone with young people.

- In certain other circumstances, such as supervising children getting changed for swimming, only those who have been CRB-checked should be allowed to supervise.

- It should be stressed that a CRB check can only show if an individual is a known offender; someone who had not previously been caught would not be identified through a CRB check.

- Advice on CRB checks is available from Four S – personnel.

- The DfES has issued guidance: Circular 0278/2002, Child protection: Preventing Unsuitable People from Working with Children and Young Persons in the Education Service.

6.13 Supervision ratios

Influencing factors

It is important to have a high enough ratio of adult supervisors to young people for any visit. Heads of establishment should decide the appropriate ratio, based on:

- Sex, age, group ability and location;

- Nature of the activities;
• Experience of adults in off-site supervision;
• Competence and qualifications of staff, both general and on specific activities;
• Competence and behaviour of young people;
• Type of accommodation;
• Duration and nature of journey;
• First Aid cover.

6.14 Recommended ratios
The following are all recommended minimum ratios, which reflect best practice as advised by the LEA and the DfES. Ultimately, ratios should be determined by a sound risk assessment; in practice this means that occasionally there will be special circumstances where it is necessary to adopt different ratios from those outlined below. As stated elsewhere in the guidelines, the quality and nature of supervision, which must be planned and active, is more important than merely having the correct supervisory ratio.

Pre-school children
Children under the age of five participating in a visit or journey require very close supervision. There should be at least 1 adult for every 2 children, so that every child can have their hand held. Where there are no significant dangers a ratio of 1:4 might be acceptable.

Years 1 to 3
There should be 1 adult for every 6 young people, with a minimum of 2 adults. A female member of staff must always be present.

Years 4 to 6
There should be 1 adult for every 10 to 15 young people, with a minimum of 2 adults. A female member of staff should always be present. On residential and foreign visits, this ratio is reduced to 1 adult for every 10 young people.

Years 7 to 11
There should be 1 adult for every 10 to 15 young people, with a minimum of 2 adults. For mixed groups there should be both male and female adults present, though this is not necessary for single sex groups. On residential or foreign visits, the ratio should be reduced to 1 adult for every 10 young people.

Over-16s
For day visits and journeys, ratios should be similar to those for years 7 to 11; however, the head of establishment can decide to alter the ratio if it is deemed appropriate for particular circumstances. For residential or foreign visits this ratio should be reduced to 1 adult for every 10 people.

Over-18s
With these young people the principle of ‘in loco parentis’ does not apply as such, but those responsible for them should still exercise the same level of care and supervision as they would for under-18s.

Guidelines for Educational Visits and Outdoor Activities
Special educational needs
For young people with special educational or medical needs it may well be necessary
to enhance these staffing ratios. In-depth advice on a specific issue can be obtained
from the Consultant for Special Educational Needs and the Head of Strategic Risk
Management.

For residential special schools, care staff may act as party leaders and supervisors
outside normal school curricular time.

Field study centres
For sixth-formers visiting study centres for a planned programme of work, the ratio is
left to the discretion of the head of establishment.

6.15 Good supervisory practice
Good supervision is a pro-active task with a philosophy of ‘prevention rather than
cure’. Good supervisors are constantly assessing and reacting to the circumstances
at hand, as they are never the same for long. It is also important to recognise that
‘safe supervision’ depends on good supervisors and is not simply a product of correct
ratios and procedures. Generally, supervision is most effective when:

- The aims and objectives of the visit are clearly understood by all supervisors and
  young people;
- The visit and activities have been carefully risk-assessed and control measures
  put in place;
- Supervisors and young people have contributed to the overall plan;
- Supervisors have a reasonable knowledge of the young people, including any
  special educational needs, medical needs or disabilities.

The party leader
It is good practice for the party leader to:

- Delegate supervisory roles to other adults in the group;
- Allocate supervisory responsibility to each adult for named young people;
- Ensure that each young person knows which adult is responsible for him or her;
- Ensure that each adult is responsible to the party leader for the young people
  under their supervision;
- Ensure that all adults and young people are aware of the expected standards of
  behaviour.

Supervisors
It is good practice for each supervisor to:

- Know the young people and to have prior knowledge of any special or medical
  needs or disabilities;
- Carry a complete group register;
- Make regular head-counts;
- Have a means of contact with other supervisors;
- Have prior knowledge of the venue;
- Continually monitor the appropriateness of the activity;
- Ensure the young people maintain the agreed standards of behaviour;
- Clearly understand the emergency procedures and be able to carry them out;
- Have appropriate access to first aid.
6.16 Registers, head-counts and buddy systems

- A ‘face-to-face’ identification and registration should happen whenever the party leaves a venue, whenever there is a change of transport and whenever there is any group reorganisation;
- Regular head-counts are an essential part of supervision and are especially important when moving from place to place within a venue;
- Take care to identify each pupil counted;
- Avoid identification on young people that could put them at risk – e.g. name-badges;
- Identify arranged rendezvous points;
- It is a good idea to develop a buddy system, where the young people are involved in watching out for other members of their group.

6.17 Recreation time

Remote supervision may be appropriate for unstructured sessions, where young people may wish to relax in their rooms or participate in informal games in a safe open area.

This is valuable time for young people and is to be encouraged. Supervisors need not have direct input but the party leader should ensure that unstructured time is properly supervised. Too much, or improperly supervised, recreation time can lead to mischief, bullying, homesickness and wandering off from the body of the group.

It is good practice to:
- Ensure there is a named supervisor responsible for each recreation session;
- Consider making appropriate games equipment available (indoor and outdoor), to occupy young people.

It must be stressed that ‘free time’ or ‘unsupervised time’ is unacceptable; there must always be a plan in place for the supervision of young people, although it may be remote or fairly informal.

6.18 Where extra care should be taken

The following are times and places where potential danger points can occur:
- When leaving venues;
- When the supervisors do not know all the participants;
- Transport;
- Moving between activities;
- When on or near water;
- When there is any group reorganisation;
- During periods between activities.

6.19 Residential supervision

There must be at least 1 teacher of each sex for mixed groups of secondary age young people. With residential visits for primary age children, it is acceptable for female staff alone to accompany the group.

- An appropriate number of group supervisors must be on standby duty throughout the night.
- It is desirable that the party’s immediate accommodation should be for the group’s exclusive use.
• It is desirable to have a supervisor on any floor/area where young people are accommodated.
• In hotels, it is essential that that a supervisor sleeps on the same floor as the young people and in close proximity to them.
• In the absence of 24-hour staffing in reception, external doors should be secured against intrusion and windows closed as necessary.
• Young people should not have to leave their immediate area to visit the toilet at night.
• When considering the advisability of young people locking themselves into their rooms at night, a judgement must be made balancing increased security against delays in evacuation in the event of an emergency. If young people are locked in, supervisors must have passkeys to hand.
• Where there is doubt concerning the above guidance, seek advice from the Head of Strategic Risk Management.
• It is essential that young people can always contact their supervisors immediately.

6.20 Being ‘on duty’
Whether it is day or night, those designated ‘on duty’ should either be directly supervising the party or be immediately available as required.

Planning time off for supervisors
Residential visits are extremely demanding of supervisors and young people alike and it is important that supervisors are given some time off when they are not on duty. Otherwise, supervisors may become overtired, reducing their ability to effectively supervise activities. Time off is likely to be in the evenings and should be organised through some form of rota system that ensures adequate supervision at all times.

6.21 Remote supervision – small group work / Duke of Edinburgh’s Award Scheme
Some activities – such as those under the Duke of Edinburgh’s Awards – require pupils to be working in small groups without direct supervision. These activities are encouraged for older young people, as they are invaluable for developing a young person’s independence and investigative skills. The withdrawal of direct supervision should be a gradual, four-stage process and should only be done when young people have been properly prepared. A supervisor should:

(i) Accompany the party;
(ii) Shadow the party;
(iii) Check regularly at agreed locations;
(iv) Check occasionally at agreed locations.

In general, parties should:
• Be sufficiently trained and assessed as competent for the level of activity undertaken, including first aid and emergency procedures;
• Have clear and understood boundaries;
• Operate an effective method of communication between the party and the supervisor and the school;
• Have a supervisor in the party’s area, able to offer assistance reasonably promptly in the event of an emergency;
• Have a recognisable point at which the activity is completed;
• Have clear arrangements to abandon the activity if necessary.
The head of establishment should consider carefully the potential hazards of such activities and whether it is appropriate that these are unsupervised.

The following guidelines should also be met (except in the case of journeys to, and participation in, particular out-of-school placements – e.g. independence training and specific activities to meet special educational needs):

**Young people 16 years and under**
- There should be no fewer than 3 and no more than 8 in any group where there is only indirect supervision by an adult.
- Visits should only be made in environments familiar to the students where there are no known exceptional hazards.
- Young people should not participate in an urban fieldwork exercise or Duke of Edinburgh’s Award expedition unless the leader/teacher has visited the area beforehand and is able to give clear guidance on potential hazards.
- Each young person should carry identification (not on view).
- The consent of parents for an unaccompanied journey/visit should be obtained.
- Extra care and consideration is needed if transport is required.

**Young people aged over 16**
- Parental consent is required. Parents must be given a clear indication of the activities to be undertaken and the number in the group or if the activity is to be undertaken alone.
- No group should be less than 3 or greater than 8 in number. If a journey is made out of the South-East of England, the group should have a reporting system to the school at stages in the journey or on arrival at their destination. Groups of more than 8 in number must be accompanied by an adult.

**Duke of Edinburgh’s Award Scheme**

The nature of the Award means that there will certainly be occasions when groups working within the Scheme are unaccompanied. Leaders must be familiar with the guidance offered by the Award Scheme and Surrey Operating Authority in particular working to the booklet *Guidelines for Expedition Procedures*.

**6.22 Supervision on transport**

**General guidance**
- The journey to and from a destination should be as exciting and worthwhile as possible. Badly supervised or poorly planned travel can, however, be potentially hazardous and lead to irritation and conflict with the general public.
- Head-counts should be made frequently. Register checks should be made each time the group moves from one area to another (such as in an airport terminal), with a ‘face-to-face’ identification and registration made every time the party boards transport.
- It is often essential to split a large party into sub-groups in order to get on buses, trains, etc. Additionally, it is far easier to supervise a sub-group in a crowded place such as a ferry terminal or airport;
Minibuses and coaches - see Appendix L for further advice on minibuses

• Good overall management of behaviour should be maintained from a position with a suitable field of view that is in close proximity to the emergency exit. Another adult should sit close to the driver and any additional adults should be dispersed throughout the vehicle, not sitting together.

• A driver cannot safely drive and supervise pupils at the same time. However, there are occasions with minibuses where young people attending the journey can clearly be trusted to behave well and therefore do not require a separate supervisor for the journey. The decision to not have additional supervision on minibuses must be carefully considered and should be made on a case-by-case basis. Normally this would only apply to a very short journey, such as a school team travelling to a local school for a sporting fixture.

Ferry crossings

The environment of a ferry is both potentially hazardous and an area of high risk. Leaders must ensure that the level of supervision is appropriate to the age and nature of the group, to which end the following guidance is offered:

• Consideration must be given to the likely danger areas on board for the particular group. These areas may alter if weather conditions change. In particular, great care and diligent supervision must be exercised if the group is allowed on deck. Under no circumstance should young people be allowed on deck by themselves.

• A clear policy regarding sub-groups for supervision and the location of the party leader needs to be established.

• On no account should a group be left on its own for the duration of a crossing.

• Groups should not be allowed on deck during the hours of darkness or in poor weather.

• Group management will be eased if a firm base/meeting point for the group is identified.

• All in the group must have been briefed about:
  (a) What to do in the case of an emergency;
  (b) The location of ‘muster stations’;
  (c) Becoming disorientated on board;
  (d) Feeling unwell.

• Safety rules and socially acceptable standards of behaviour should be clearly agreed with all members of the group. This should include a policy for shops, bars and restaurants.

• The structuring of the journey time with appropriate activities will enhance the educational value of the whole programme and help prevent boredom. This may be of particular benefit when there is a delay. The ferry company might be able to offer help and advice here.

• Group management on the dockside requires special consideration, taking into account immigration procedures, road and rail traffic, foreign signs, unexpected hold-ups and often-inadequate public facilities.
7 Preparing parents, carers and young people

Well-informed parents/carers can considerably improve the smooth running of a journey or visit, as they can better prepare their children and are less likely to be anxious themselves over the visit or journey.

7.1 Pre-visit presentation/parents’ evening

A pre-visit presentation is an excellent way of giving parents a clear understanding of the journey or visit and also allows particular questions and queries to be answered. A suggested agenda for such a meeting is outlined below:

Aims and objectives – explain why the journey or visit is being organised.

Outline the educational experiences:

(i) Travel;
(ii) Study of area to be visited or foreign country and way of life;
(iii) Communal living;
(iv) Self-reliance.

The venue

(i) The location of the venue;
(ii) The type of city, town or village in which the visit will take place;
(iii) Local recreation and educational facilities.

Accommodation

(i) Situation;
(ii) Bedrooms;
(iii) Recreation facilities;
(iv) Dining facilities;
(v) Security arrangements.

The programme

This should include specific information regarding the nature of the activities and how the assessed risks will be managed. Activities must be explained fully so that parents and carers can make informed decisions about their child’s participation. It must be made clear to parents and carers that some activities, such as skiing, can never be risk free. Parents and carers must fully understand what this might mean.

Transport and travel

Outline the modes of travel, including names of any coach companies or airlines being used.

Staff

List the staff and other adults accompanying the party as well as any venue staff that will be involved.
Itinerary – this should include details of:
  (i) The departure date;
  (ii) The journey route and mode of travel;
  (iii) The date of return.

Kit list
  (i) Clothing required, including any special items;
  (ii) Options of buying, hiring or borrowing;
  (iii) Luggage type and labelling;

Code of conduct
  (i) Expected standard of behaviour;
  (ii) Rules;
  (iii) Sanctions;
  (iv) The use of mobile phones.

Group size

Cost
  (i) Package cost;
  (ii) Essential extras;
  (iii) Non-essential extras;
  (iv) Payment of deposit (non-refundable);
  (v) Payment of balance;
  (vi) Date of final payment;
  (vii) How payments should be made, including statement of the establishment’s policy on charging and remission where applicable.

Insurance
A copy of the insurance details should be made available. This should clearly show the extent and limits of the policy, including benefits and exclusions.

Programme of arrangements
Dates for:
  (i) Payment of deposits;
  (ii) Payment of the balance;
  (iii) Payment of pocket money;
  (iv) Passport application;
  (v) Consent forms.
Arrangements for:
  (i) Arriving at point of departure;
  (ii) Collection on return from journey.
7.2 Parental consent – (See Appendices D and E)

- It is essential that the parent/carer be asked to give his/her written consent well in advance of a planned journey or visit. If the visit is local, requires no transport and is a regular part of school activities (such as weekly swimming lessons at a local pool), then consent need only be obtained once, at the beginning of term. However, if the visit’s circumstances change, then parents/carers need to be asked again to give written consent.

- Parents/carers must also be informed of their child’s likely participation in extra-curricular activities, such as sports fixtures, theatre visits, etc., that may involve travelling away from the school or youth centre.

- The head of establishment must ensure that parents/carers are fully aware of the nature of the visit and the activities to be undertaken and have given their written consent, which must include a statement that, to the best knowledge of the parent/carer, the young person is fit and healthy for the purposes of the visit, together with any relevant medical information.

- If a parent or carer refuses consent then the young person may not attend. However, every effort should be made to deliver the curricular aims of the journey or visit by other means.

- Where conditional consent is given, the head of establishment must decide whether or not the young person can attend the journey or visit.

7.3 Medical consent – (See Appendix F)

- Parents/carers need to give written consent that emergency medical action can be taken by doctors as necessary. If consent is withheld, the head of establishment can withdraw the young person from the trip. However, withdrawing a young person would be a last resort: instead, it should be explained to parents/carers that the party leaders would communicate their wishes to medical staff but that the responsibility for any medical decision would lie with the doctor or other appropriate professional. The party leader would attempt to contact the parents or carers but in an extreme emergency this might not be possible.

- For journeys abroad, it is a sensible procedure to carry a signed translation of the consent form, which foreign medical staff can understand.

- The suggested consent form is included in Appendix D to this document. A model medical questionnaire is set out as Appendix F. The information given to parents/carers must include a full written description of the visit. This should include details of the daily programmes, nature of supervision and insurance arrangements.

7.4 Travel arrangement consent

- Parents or carers need to be informed of and asked to give their consent to all the modes of transport by which their children will be journeying.

- Details of the length of journey may also need to be made available and consent gained. This is relevant, for example, to students undertaking a long-haul flight where there may be issues of Deep Vein Thrombosis.

- If parents’ cars are to be used, Appendix J should be considered.
7.5 Preparing young people

‘Pupils who are involved in a visit’s planning and organisation, and who are well prepared, will make more informed decisions and will be less at risk.’ (HASPEV)

Good preparation of young people is key to providing a safe, informative and memorable trip. The following points should be known and well understood by the young people:

- The aims and objectives of the visit/activity;
- Background information of the site(s) to be visited;
- What standard of behaviour is expected;
- Appropriate and inappropriate personal and social conduct;
- Who is responsible for the group;
- The young person’s visit checklist;
- Changes in the scheduled activities and changes of supervisor.

7.6 Preparing young people to be safe

It is vital that young people have a good knowledge of safety issues and procedures. The following guidelines are set out for party leaders to consider putting in place with their young people:

- Carrying identity cards. (They should not be worn openly and should be written in the appropriate language.)
- What to do if approached by a stranger;
- Rendezvous procedures;
- What to do if separated from the group or lost. This should include telephone numbers and emergency contacts and accommodation address;
- Emergency procedures;
- Why safety precautions are in place;
- How to avoid specific dangers and why they should follow rules.

7.7 Preparing young people for remote supervision

Young people should be aware of the ground rules and should also understand why they are necessary. The group should have proper equipment appropriate to the activity, and have received prior training such that they can safely operate their equipment in an unsupervised environment. Other items the supervisor might consider essential/advisable:

- Money (including appropriate coins for telephone calls);
- Maps and route cards;
- Knowing the location of local telephones;
- Knowing how to summon help;
- Identity cards and a rendezvous point;
- A mobile telephone with emergency contacts if lost. (This is carried as a last resort and its usage clearly defined by the party leader!)

They should be aware there is always indirect supervision – e.g. there should be a check-in time, the area for the activities should be clearly defined, the time of return should be determined, an emergency procedure should be arranged and a local contact point should be identified. Young people also need to be warned about approaching or being approached by strangers, especially in lonely areas or in environments with which they are unfamiliar.
7.8 **Consent for remote supervision**

Parents and carers must be made fully aware of any remote supervision within the details of the journey.

7.9 **Young person/parent contact during the visit**

In the event of an emergency, parents and carers should be able to contact their child via a named school contact or the party leader.

7.10 **Mobile phones**

The access to and use of mobile phones needs to be carefully considered. Many young people own mobile phones and use them regularly as part of their normal lifestyle, but journeys and visits need to be treated differently. In terms of safety, mobile phones can be an invaluable tool with which pupils can summon help or stay in contact with the party leaders. However, mobile phones are a distraction to young people and, if their use is unchecked can easily devalue the journey or visit. Young people phoning parents at home might pass on inaccurate information regarding the journey or visit that could undermine the party leader and their plans. This point is especially important when considering the impact of a young person passing on information in the wake of an accident or emergency. It must also be remembered that mobile phones can, and do, go wrong. They must never be the only means of coping with difficulties. Self-reliance, thorough training and experience remain invaluable.

The use of mobile phones should be carefully considered in the light of the particular circumstances and needs of each journey or visit. Generally it is advised that access is limited and controlled.
8 Health and general welfare

Party leaders should be aware of any relevant medical, personal or special needs of the party members, whether supervisors or young people. This information should be available well before the departure date, notwithstanding the requirement for parents/carers to update the information if necessary.

8.1 First aid

The need for first aid should be part of the risk assessment.

A trained and qualified first-aider should always be available to administer first aid to groups. In practice this usually means that one member of the supervisory staff should hold a current, basic first aid qualification. Supervisory staff includes not only the teachers and youth workers but also externally-contracted staff. For example, where contracted activity instructors holding a first aid qualification are running a session, there is no need for the party leader or supervisors to be first-aid qualified.

Equally, a party going to a leisure centre, where there are first-aiders on site, need not be accompanied by a qualified first-aider, whereas a party working alone on a local common would need to be.

It must be noted, however, that first aid should always be a voluntary action; a member of staff cannot be made to administer first aid, unless that is a clear part of their terms of employment.

8.2 The first aid kit

There is no mandatory list of items for a first aid kit. However the Health and Safety Executive recommends the following minimum contents for a travelling first aid kit where no special risk has been identified:

- A leaflet giving general advice on first aid;
- Six individually-wrapped sterile dressings;
- One sterile unmedicated wound dressing approximately 18cm x 18cm;
- Two triangular bandages;
- Two safety pins;
- Individually-wrapped moist cleansing wipes;
- One pair of disposable gloves.

Current first aid training advises that only the minimum necessary first aid should be administered, as expert help should be available (i.e. ambulance, local hospital, etc.) within a short space of time.

It is acknowledged here, however, that in certain circumstances – i.e. hill-walking, expeditioning, etc. – help will not be so readily at hand. In such circumstances, party leaders may feel the need to carry additional first aid items.

In such a situation, the party leader would be discharging a duty of care and acting ‘in loco parentis’ if they administered the type of help and care that a parent would give to his/her own child. The principle should be to hand the patient over to more expert medical aid (be that rescue services, a doctor, etc.) in as good a condition as possible.

Party leaders who work with parties in remote terrain where outside help is not readily available must hold a current first aid qualification that is appropriate to the circumstances.
In addition to any of the contents listed in the first aid kit above, the trained first-aider might wish to add certain items that he or she has been trained to use, such as,

- Paracetamol*;
- Saline solution;
- Crepe bandages;
- Plastic bags and ties for disposal of soiled items;
- Scissors (must be blunt-ended);
- Individually wrapped waterproof elastoplast-type dressings;
- Individually wrapped moist cleansing wipes;
- A resusciade (for hygienic mouth to mouth resuscitation).

* If painkillers are carried, prior parental consent should be sought. Painkillers can only be Paracetamol-based.

The first-aider should decide the total quantity of equipment carried on the basis of numbers at risk, environment and portability.

8.3 Dealing with young people’s medical needs

- The party leader should be made aware well in advance of the visit or journey of all the medical needs of those participating. The parents or carers should be consulted on how best to deal with these needs, leading to appropriate arrangements being made for the visit or journey.
- Insurance policies must cover staff and young people with pre-existing medical needs.
- All supervisors should be well informed regarding a young person’s medical needs, as well as any emergency procedures.
- Supervisors should have the opportunity to raise any concerns and queries they may have about their ability to properly support the young person. If supervisors remain unsure about their ability to support a young person they should seek further advice from the parents/carers, the establishment’s health service, the DfES guidance Supporting Pupils with Medical Needs, or SCC guidance Pupils’ Health and the Administration of Medicines.
- Where necessary, an individual treatment plan should be prepared.

Medicines and medication

This is an area that requires careful thought. In general, medicines should be clearly labelled with name and dosage and handed to the party leader, as obviously it is not desirable for young children to be responsible for them. For certain conditions, however, this procedure may be wholly inappropriate and potentially harmful – e.g. asthma, where it would be wrong to separate an asthma-sufferer from a prescribed inhaler. Similar consideration and care might need to be exercised for the sufferer of diabetes. In such circumstances, it would be advisable to consult the young person’s parent/carer and, if necessary, to seek medical advice.

8.4 Injuries

All injuries to any person involved on an off-site activity of any kind must be reported to the head of establishment, who will pass on this information as appropriate. Depending on the severity of the incident, it is possible that the RIDDOR process will need to be implemented.
8.5 Near accidents

Near accidents must be reported to the head of establishment and a written description kept. Near accidents must also be considered in future risk assessments. In addition, it would be helpful if these reports were supplied to the LEA, so that any lessons learned can be shared with all schools and groups. This would be done on an anonymous basis.

8.6 Hot weather

Party leaders and supervisors must be aware of the potential problems associated with hot conditions.

Clearly, planning and preparation can lessen or prevent harmful and serious effects. In particular, party leaders and supervisors should consider the following:

- **Weather forecasts** – Attention should be given to hot weather warnings and notice taken of the maximum times advised for exposure to the sun.
- **Provision of shade** -- Adequate shade must be available at times during the day so that the young people can have a cooler area and are not exposed to UV radiation for excessive periods.
- **Liquids** – An adequate supply of or access to liquids should be made available. Where the young people provide their own drinks, they must be monitored so that drinks are taken regularly rather than at one go. (This is particularly important for young children.)
- **Clothing** – The young people should be encouraged to wear suitable protective clothing – i.e. long sleeves and appropriate headwear.
- **Sun creams** – Sun creams and screens of a sufficiently high factor should be used. Where young people have not brought their own, it should be provided. To minimise the risks of cross-infection, the sun cream should be poured on to the young person’s hand from above in the style of a ‘soap dispenser’.

**NB:** There has been much concern expressed about supervisors applying sun creams to young people. While it is acknowledged that this is a sensitive issue there are occasions, particularly if a child is very young or has special needs, where this will need to be done. In such cases, supervisors should not do this whilst alone with a child and a protocol should be established. It is not an option to leave a child unprotected.

- **Programme** – The day’s activities may need to be amended so that excessive demands are not made during the hottest part of the day.

8.7 Travel sickness

This is a fairly common problem and should be anticipated. An adequate supply of sick-bags, water, face-wipes, etc. should be carried.
9 Emergency procedures

For all journeys the school or youth group must identify a duty officer. For residential journeys there should also be a home-based contact.

9.1 Duty officer

The duty officer is the person who will support the party leader and group in the event of a serious incident, accident or emergency, or on any occasion where there might be media interest. He or she must be an experienced, senior member of staff who has sufficient authority to be able to offer support and guidance in difficult circumstances.

The duty officer must have full and complete details of the journey, including contact details for participants and staff. The duty officer must be available for the party leader until the group has returned safely.

In the event of a serious incident, the duty officer should immediately seek advice and support from the LEA. The procedure for this is outlined below.

9.2 Immediate action following a serious accident or incident

A serious accident or incident is defined as:

- an accident leading to a fatality, serious or multiple fractures, amputation or other serious injury;
- circumstances in which a party member might be at serious risk or subject to serious illness;
- any situation in which the press or media might be involved.

9.3 Operation Duke

Operation Duke is the name of the LEA emergency response scheme, so called as the Duke of Edinburgh’s Award Scheme has many groups away during the year.

It provides a network of support for a group facing an emergency and will be the means of involving senior officers within the LEA who have been trained to assist if an emergency or serious incident occurs.

9.4 Guidance notes for party leaders

Remember that serious accidents and incidents are extremely rare, but if one occurs it certainly makes great physical and emotional demands upon you. These guidance notes are designed to help you deal with an emergency.

Remember that you are not alone: the LEA and your school/organisation will support you as much as possible.

Be prepared

- Carry the emergency reference card at all times.
- Ensure that you are familiar with all of the County guidelines for off-site activities.
- Brief your group on emergency procedures before they set off, including details of communications, so that they know how to deal with these should the party get split up.
Care of the group

- Ensure safety from further danger.
- Contact local emergency services immediately and follow their advice.
- Deploy other staff/adults as effectively as possible in continuing to ensure the welfare of your group.

Communication

Contact your duty officer, or, if the duty officer is not available, contact SCC Emergency Planning Officer - tel: 07831 473039

You will be answered by:
- the SCC Emergency Planning Officer (in person) – quote ‘Operation Duke’
or:
- an answerphone – quote ‘Operation Duke’, leave a message and your number. You will be called within 5 minutes.

or:
- a messaging service – quote ‘Operation Duke’, leave a message and your number. You will be called within 5 minutes.

Note: In most cases you will speak to someone immediately. The answerphone and message service are there in the event of the Emergency Planning Officer being in charge of a vehicle at the time the call is made.

When you speak to either the duty officer or Emergency Planning Officer give the following information:

- Quote ‘Operation Duke’
- Your full name
- The telephone number you are calling from
- Name of group involved
- Exact nature of the incident
- Is a fatality involved? Has it been confirmed? By whom?
- Full name(s) and age(s) of injured person(s)
- Exact nature of injuries
- Whether local police or emergency services have been informed
- Whether any next of kin have been informed, if so, how
- If contacting Emergency Planning Officer, name and number of unobtainable duty officer

Next steps and general advice

- Parents and relatives will naturally be anxious to establish what is happening, but try to prevent party members (staff or young people) from telephoning home until after you have made contact with your duty officer and this has been agreed. (Given the proliferation of mobile phones this will be difficult, but is important, as incorrect information and rumour will make the situation worse.)

- Do NOT speak to the press or media. Refer enquiries to the local emergency services handling the incident on the ground and promise that ‘an official statement will be made through the County Council’s Press Officer as soon as possible’.

- Do NOT admit liability of any sort to anybody.

- Do NOT allow anyone, apart from medical services, to see any party member without an independent witness being present.
• Retain any equipment involved in an unaltered condition.
• Keep a written record of all that happens.
• Be as compassionate as possible, with anyone involved.
• Remember that no one, unless they are in a relevant official capacity, has the right to see anyone who does not wish to see them.
• If you change location, remember to let your duty officer/head of establishment have the new telephone number at which you can be contacted.

Finally, remember that all situations are different. Your duty officer or a senior officer of the Authority will make themselves available to offer you advice and support – use them as much as you need.

9.5 Guidance notes for duty officers/heads of establishments

In the event of a serious accident or incident involving a group on any form of off-site activity, it is paramount that the party leader should receive as much advice and support as he or she needs.

Serious incidents are fortunately rare – this can, however, lead to complacency, which must be guarded against. Therefore you will need to ‘think on your feet’. This could be difficult under pressure and the following guidelines will help.

• **Be prepared:**
  You must have comprehensive details about the group and the journey. This will include contact and medical details for all involved (including staff and volunteers) and full details of the itinerary, addresses, travel/coach company, etc.
  • You must have immediate access to these procedures, and the information and means to use them, at all times.
  • Make sure you are familiar with all the County guidelines for off-site activities.

**Answering the emergency call**

You will need to gain and record the following:

• Name of group
• Name of party leader/caller
• Telephone number the caller is speaking from
• What happened
• To whom
• Where
• When
• What has happened since

**If a fatality is involved or suspected:**

• Has this been confirmed?
• By whom?
• Have any next of kin been informed?

**[NB: In the event of a fatality it will normally be the Police who contact the next of kin.]**
General advice

Advise the party leader to follow instructions from the local police/emergency services, and, unless they specifically request otherwise, your advice to the party leader should be to:

- Keep the party together.
- Co-ordinate any contact with parents or any outside bodies.
- Refer media attention to the police or County Council Press Officer – do not answer questions.
- Remain available: if it is necessary for the party to change location, they must advise you of the new telephone number.

Next steps

- **In office hours:**
  Telephone the Contact Centre: **08456 009009**, and explain that this is an ‘educational visits emergency’ and you wish to contact a Senior Education Officer.
  
  **Note:** Most headteachers and senior youth workers will have the contact details of their LEO or other senior officer and will prefer to contact them direct.

- **Outside office hours:**
  Telephone the SCC Emergency Planning Officer on **07831 473039**. (See guidance for party leaders.)

  A senior officer, trained to deal with off-site emergencies, will contact you, and you should give them all details, including your telephone number. The senior officer will then contact the following:

  - Duty Press Relations Officer
  - The headteacher(s) of the group(s) involved, where applicable.
  - Unit head(s).
  - Other senior officers, to establish a support team.

  Consult with the senior officer how best parents might be informed. The senior officer can advise on the best way to inform parents, if the local emergency services have not already undertaken to do so. It may be better for the senior officer or another colleague to do this, as you must remain available for the party leader to contact.

  Maintain a written record of events, including the times of telephone calls, etc.
OFFSITE EMERGENCY CONTACT PROCEDURES

Party leader
phones

Duty Officer
(available)

[No further initial notifications required of party leader]

Party leader
phones

SCC Emergency Planning Officer
phones

Senior Officer

Senior Officer
contacts

• Duty Officer
  Headteacher/unit head
  Duty Press Relations Officer

  and

  supports duty officer and/or head in dealing with parents and others involved in the situation

9.6 Emergency reference cards

Emergency cards are available in Appendix M. Photocopy both sides back to back, to produce three cards. You may choose to add other, local useful numbers. Do not reduce the card in size to the point where it might be difficult to read in poor light.
9.7 Guidance for senior officers

In the event of a serious accident or incident involving a group from the Authority, you may be called upon to provide advice and support and/or to respond to media enquiries.

A serious accident or incident is defined as:

- an accident leading to a fatality, serious or multiple fractures, amputation or other serious injury;
- circumstances in which a party member might be at serious risk or subject to serious illness;
- any situation in which the press or media might be involved.

You may be contacted by the Contact Centre, a duty officer or, if the duty officer is not available, by a SCC Emergency Planning Officer.

You will need to record the following:

- Name and telephone number of Duty Officer.
- Name of Group and Party Leader and a contact telephone number.
- Details of the incident.

You will then need to contact:

- SCC Press Officer.
- The headteacher(s) of the group(s) involved or unit head(s).
- The party leader if the duty officer has not previously been contacted.

You must agree with the duty officer the arrangements for informing parents. Parents must be informed as quickly as possible to avoid them having the added distress of hearing news from media sources or ‘on the grapevine’. Where a fatality is involved, the police will almost certainly inform the next of kin.

You may also need to consider with the duty officer the desirability of establishing a meeting point where parents and children will be reunited. When a serious accident has occurred, you should consider whether other support agencies, might have an important role to play.

It may be necessary for you to authorise payments for additional transport, food and refreshments, possibly even accommodation.

Your role is key in making decisions on behalf of the County and supporting the duty officer, party leader and group.

The media attention might be intense. It will usually be better to refer all questions to the Press Officer, although they will return to you as the most senior officer involved.

You should assemble a team of other senior officers. Even smaller incidents will have ramifications that cannot be dealt with effectively by one person. Do not try to manage the incident on your own.

The Head of Strategic Risk Management should be notified of all off-site incidents.

Finally, all emergency situations will be different and the guidelines for party leaders, duty officers and senior officers will not cover all eventualities. As important as guidelines will be the ability to react purposefully to the event and support colleagues who are present at the scene of the incident.
10 Types of visits

10.1 Field studies

The term field studies is here used to include types of research or learning taking place out of doors. It is not subject-specific and can be understood to embrace many types of venture. These might include visits to:

- Farms or industrial sites;
- The local high street or other urban site;
- Coastal locations;
- A nearby park, woods or field;
- Areas of geological interest;
- A site for scientific research;
- A venue where practical conservation will take place;
- A local church, etc.

Field studies including off-site activities in urban areas are widely recognised for their potential educational worth. However, the value, and often the safety, of these activities depend to a large extent on the thoroughness of the planning and preparatory work.

10.2 General considerations

If appropriate facilities for continuing field studies in the future are to remain, it is essential that groups act in a responsible and environmentally sensitive manner. Concentrated attention and thoughtless collection are destroying the scientific and environmental value of irreplaceable sites and the volume of fieldwork is causing concern to many site-owners. To ensure that groups work within a framework of safety and in the spirit of ‘minimum impact’, the following general points should be observed:

- Obey the Country Code and observe local byelaws.
- Always seek prior permission before entering private land. Ensure that your actions do not jeopardise future access.
- Keep collection to an absolute minimum – wherever possible record on site. **NB: The disturbance to or removal of many species of flora and fauna is illegal.**
- Avoid undue disturbance to wildlife. Plants and animals may be inadvertently displaced or destroyed by careless actions.
- Leave no litter.
- In coastal areas, consult the local Coastguard services whenever possible to learn of local hazards, such as unstable cliffs or tides, which might jeopardise excursions that would be possible at other times.

10.3 Hazards

Farms and industrial sites are potentially dangerous places with specific hazards such as slurry and grain pits, machinery, animals, steep slopes, chemicals, straw- or hay-stacks, barbed wire, electric fences, etc. The leader must:

- Be aware of the need for safety;
- Have alerted all accompanying staff and other adults to safety in general and danger points in particular;
• Have informed the children of the need for responsible behaviour and of specific hazards, including those of vehicles that may be operating in limited space and/or in difficult conditions;

In certain circumstances it may be advisable for people with particular medical or health conditions to avoid farm or industrial visits. This might include those with heart pacemakers who might be exposed to strong electro-magnetic fields, those prone to asthma who might react to high levels of dust, etc., and pregnant women who might risk infection from farm animals, etc. See 10.7 for more specific detailed advice on farm visits.

10.4 Geological fieldwork

General

In addition to the general points made in 10.2 the following specific advice should apply:

• Safety goggles must be worn when using geological hammers.
• The removal of in-situ fossils, rocks or minerals should be avoided unless a right to do so has been given and they are genuinely needed for serious study.
• Where collection is necessary, it should be limited to those localities where there is a plentiful supply of scree, fallen blocks and waste tips.
• Collection should never be made from walls or buildings. Care should be taken not to undermine fences, walls, bridges or other structures.
• Be considerate. Do not render, by your actions in collecting, an exposure untidy or dangerous for those who follow you.
• Do not take risks on cliffs or rock faces. Beware of insecure rock and unstable cliffs and paths.
• If intending to explore underground, the activity must conform to the County Regulations for caving and mine exploration

10.5 Health and Safety at Work

Safety measures are more strictly enforced on sites including quarries. Employees must wear protective clothing, particularly safety helmets, so visitors are expected to observe the same precaution, often as a condition of entry. Suitable helmets are readily available, cheap to purchase and should be part of the necessary equipment of all geologists. They must be worn at all times in quarries.

10.6 Visiting quarries

• The leader of the party must obtain prior permission to visit. Many quarry-owners are reluctant to admit school and student groups because of the potential liability for damages in the event of personal injury. Quarry-owners are responsible for the safety of persons lawfully on their land, and under the Unfair Contract Terms 1977 were unable to exclude liability for personal injury claims arising from the state of the premises. The Occupier’s Liability Act 1984 modified the position so as to enable the occupier of business premises to permit visits for recreational or educational purposes and to include terms in the permission that restrict or exclude its liability to such visitors in respect of the dangerous state of the premises.
• The leader should be familiar with the current state of the quarry. He/she should have consulted the manager as to where visitors may go and what local hazards should be avoided.
• On each visit, both arrival and departure must be reported.
• In the quarry, the wearing of safety hats and stout boots is essential.
• Keep clear of vehicles and machinery.
• Be sure that blast warning procedures are understood.
• Beware of rock falls. Quarry faces may be highly dangerous and liable to collapse without warning.
• Beware of sludge lagoons.
• Before signing any form of indemnity, the party leader should seek advice from SCC Risk Management and Insurance Section. (See also section 2 Insurance).

Disused quarries

Access to disused quarries is often deceptively easy, since they may be close to public footpaths or on open fell land. Although they may have been used as ‘playgrounds’ in the past, they may have inherent dangers – from rock falls and steep drops in particular. It is usually best to avoid disused quarries.

10.7 Visiting farms

Specific points for preparing to take young people on farm visits:
• Ensure that all involved in the visit are familiar with their own establishment and the LEA guidelines on school journeys.
• Check that the farm is well managed, e.g. has a good reputation for high standards and stock welfare, that the grounds and public areas are as clean as possible and that suitable first aid arrangements are made. The party may wish to consider taking a travelling first aid kit on the visit. Animals should not have access to any outdoor picnic areas. A prior visit to the farm by a member of staff is advisable wherever possible. Is the farm a ‘working’ farm or a ‘show’ farm?
• Check that the farm has suitable washing facilities, appropriately signposted, with running water (preferably hot and cold), soap and disposable towels or hot-air hand dryer(s). Any drinking-water taps should be clearly labelled in a suitable area.
• Ensure that suitable precautions are in place where appropriate – e.g. clear signs or restricted access in areas such as near slurry pits or where sick animals are isolated.
• Ensure that there is an adequate number of adults to supervise the children, taking into account the age and stage of development of the young people. Ensure that adults are suitably briefed regarding the checklist. Very young children (under 5) will need an adult hand per child – i.e. a ratio of 1:2.
• Female visitors to farms should be warned that there is a possible risk of diseases being transmitted to pregnant women during lambing time.
• Good hygiene arrangements should be discussed with the young people. This should include washing hands and not putting hands into mouths.
• Prepare young people for the visit by explaining the expected standards of behaviour and the importance of following any rules, e.g. shutting gates.
• Inform parents/children of the advantages of wearing footwear that can be easily cleaned. Wellington boots are ideal footwear, but any closed shoe is preferable to open footwear.
• Explain that visitors should not eat or drink anything, including chewing gum, etc. while touring the farm, because of the risk of infection and risk of contact with toxic pesticides and other chemicals.
• Visitors should be aware of the dangers posed by farm machinery and chemicals used on farms.
During the visit:

- If visitors are in contact with, or feeding, farm animals, they should not place their faces against the animals or put their hands in their own mouths afterwards.
- Before contact with animals, ensure cuts and grazes (especially on hands) are covered with waterproof plasters. After contact with animals and particularly before eating and drinking, ensure all visitors wash and dry their hands thoroughly. If young children are in the group, hand-washing will need to be supervised.
- Meal breaks or snacks should be taken well away from areas where animals are kept, and visitors should not eat anything that may have fallen on the ground. Any crops produced on the farm should be thoroughly washed in drinking water before consumption. Water for drinking and food-washing should be taken only from taps clearly labelled as drinking water.
- Ensure visitors do not consume un-pasteurised produce, e.g. milk or cheese, or taste animal feedstuffs, such as silage and concentrates.
- Manure or slurry presents a particular risk of infection. Visitors should not touch it, and any cuts or grazes should be covered with waterproof plasters. If visitors do touch manure or slurry, they should thoroughly wash and dry their hands immediately.

At the end of the visit:

- Ensure all visitors wash their hands thoroughly before departure.
- Ensure footwear is as free as possible from faecal material.

10.8 The Duke of Edinburgh’s Award Scheme

Expeditions

The Surrey County Council Youth Service Curriculum Development Unit is the operating authority for the Duke of Edinburgh’s Award scheme. The responsibility of the operating authority is to ensure that all participating units work in accordance with the philosophy and requirements of the Award. The operating authority has to ensure that leaders are suitable to deliver the aspects of the Award, particularly the expedition section, which requires all participants to spend a period of time away from home.

The aim of the expedition section is to encourage a spirit of adventure and discovery. All ventures involve journeying, either in the countryside, on waterways or at sea. Each has a purpose, and is undertaken on foot, bicycle or horseback, or in canoes or boats and without motorised assistance. All ventures must present the young people with an appropriate challenge in terms of purpose and achievement.

The majority of overnight stays will involve camping. In exceptional circumstances the use of barns, bothies, mountain huts or hostels may be used, but only with the approval of the operating authority. Certain participants may have some camp equipment and food, pre-positioned at camp-sites.

All groups must be trained. Those who have the necessary skills and experience for the particular activity and environment in question should give instruction.

Before the qualifying venture, instructors must certify in individuals’ record books that they have undergone training in the required skills and have achieved a standard of knowledge appropriate to the enterprise to be undertaken.
All requirements for the expedition section are detailed in the Duke of Edinburgh’s Award Handbook, which is available from the Duke of Edinburgh’s Award Youth Office. In addition, the operating authority has produced a document called ‘Guidelines for Expedition Procedures’, which is similarly available from the Duke of Edinburgh’s Award Youth Office. The Award Headquarters produces additional literature on Expeditions, Exploration, Camp Craft and Navigation.

All young people participating in the Award have to undertake both practice expeditions and assessed expeditions.

The group should undertake planning and organising the venture, and the plans should be submitted through the Supervisor to the Assessor for approval.

**Supervision**

All ventures, including practice journeys, are to be supervised by an experienced adult who must accept responsibility for the safety of the group on behalf of the operating authority.

Groups undertaking a qualifying venture, should not usually be accompanied by adults; however, the supervisor **must** be present in the area of the venture, and **must** meet the group(s) at least once a day.

**Special educational needs**

Participation by groups or individuals with special needs is to be welcomed and encouraged. Procedures or rules concerning supervision, location, accommodation, etc. can be modified as appropriate. Advice is available from the SCC Youth Service Curriculum Development Unit.

**Assessment**

Before the venture, the competence of individuals must be evaluated and checks made to ensure that they are properly equipped, and not a danger to themselves, their companions or the environment.

The assessor must be an adult who is independent of the group.

At Gold Level, for an assessment taking place in wild country, an assessor from the appropriate Wild Country Panel should be used, or an Accredited Assessor.

**General procedures**

For all registered Units, the same procedures apply. Once groups have been identified, the supervisor must complete the ‘Application for Approval for a youth service Activity’ form and adhere to the procedures specified in the ‘Guidelines for Expedition’ document.

All completed forms must reach the Duke of Edinburgh’s Award Youth Office at least one month prior to the venture. Each venture has to nominate a home-based contact and duty officer. Exactly the same procedures apply to the Duke of Edinburgh’s Award expeditions as any other residential visit.
10.9 Outdoor Centres (Adventure activities)

Adventure activities
Adventure and challenge are important elements in the development of the young person, as are learning to be responsible for oneself and others. Whilst recognising this, however, it is vital that young people should not be exposed to unnecessary danger, and any risk associated with an activity should be commensurate with age, experience and ability.

The following pages offer guidance on qualifications and procedures for a number of activities, but it is stressed again that this guidance cannot be exhaustive and the quality and experience of leadership is paramount in ensuring that outdoor activities are acceptably safe, educational and enjoyable.

Choosing an outdoor centre
Outdoor centres vary considerably, from small, specialist centres to large organisations offering a wide range of activities.

- The choice of centre will depend on the aims of the visit, its location, the experience of its staff and the cost. Any reputable centre will be willing to respond to enquiries and, where possible, agree to meet the needs of the visiting group.

- Many outdoor activity centres hold recognition through existing accreditation schemes. Not all of these, however, are equally comprehensive or necessarily of equal validity, and advice should be sought before placing reliance upon them.

- In general terms, the head of establishment should be assured that a centre:
  
  (a) is adequately insured;
  (b) has staff who are sufficiently experienced, qualified or trained;
  (c) maintains written operating procedures for activities;
  (d) has qualified first-aiders both in the field and at the base;
  (e) guarantees that all equipment used is fit for the purpose intended and meets recognised safety standards;
  (f) has a standard of accommodation that is suitable to the group, particularly for people with special needs;
  (g) has agreed with and signed all aspects of Appendix B, ‘The Educational Use of Commercial, Charitable and Private Facilities’, and that this is submitted to the LEA;
  (h) holds a valid AALA licence where necessary see section 10.10;
  (i) has written accident and emergency procedures.

NB: Where centres are frequently used by LEA parties, Appendix B may not need to be sent. The Head of Strategic Risk Management can advise on this.

10.10 The Adventure Activities Licensing Authority (AALA)
It is a legal requirement for commercial organisations offering certain adventure activities to young people under the age of 18 to hold an AALA licence for all the activities they provide that fall within the scope of the legislation. (This covers most adventure activities; for a full list see: www.aala.org). Where a centre holds an up-to-date licence covering all the activities in which the party will take part, it is unnecessary to check their operating procedures, risk assessments, staff qualifications and equipment. To hold an AALA licence, experts in all these areas must regularly inspect the centre.
For pre-visits, it is enough to see the licence and note the licence number. The validity and scope of the centre’s licence can also be checked on the AALA website.

It is important to note that an AALA licence does not cover aspects of the organisation other than the activities named on their licence. Accommodation and washing facilities etc. will not have been checked. Organisations which do not charge for activities, or who provide activities that fall outside the scope of the AALA scheme, or who operate abroad are not included in the AALA scheme. In such a case the party leader should check that there are written risk assessments and operating procedures for each activity, and should ask for written evidence of the qualifications and experience of the staff leading the activities. Ask for a written agreement identifying the minimum, current qualification an instructor leading the activities will hold. The yellow section of these guidelines describes the minimum acceptable qualifications required to lead an activity and also outlines the normal operating procedures expected for the most common adventurous activities. The Head of Strategic Risk Management can advise further.

Many centres use their own in-house training and this can vary from the very good to the unacceptable. Find out what you can about the trainers. Wherever possible, insist on recognised National Governing Body Awards.

The activities within scope of the AALA scheme are listed below.

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<th>WATERSPORTS</th>
<th>TREKKING</th>
<th>CAVING</th>
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<td>Abseiling</td>
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<td>Sea-level traversing</td>
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### 10.11 Higher risk environments

It is impossible to be specific about what constitutes a higher risk environment. In general terms, however, water, remoteness, the danger of a fall and underground ventures would be considered to be higher risk. It is nevertheless obvious that there is an enormous difference between an activity such as adventure caving and making a tourist visit to an established show cave.

Similarly, a coastal walk in good conditions following a way-marked route away from edges of cliffs is vastly different from negotiating an unstable, unfenced track that involves being close to a dangerous drop.

A preliminary visit will usually help the party leader to determine the level of risk involved, and further guidance can be sought from the Head of Strategic Risk Management.

Where a visit is primarily for field studies, the Consultant for Geography will be pleased to offer advice.
11 Residential venues

Most schools and youth groups offer residential visits, and their value to young people is great. The type of visit will depend on its purpose, the time of year, the distance to be travelled and the cost, as well as the nature of the group. It is possible to buy a combination package of accommodation and activities, or these can be arranged separately. Whichever is chosen, the site’s residential arrangements and the instructors should be suitable for the needs of the group. (Please see section 4.4 - Preliminary Visits.)

Approval must be sought from the head of establishment and the governing body or youth service Area Manager and, if hazardous activities are involved, the LEA.

11.1 Prior to the visit

The party leader must ensure that the venue to be visited is safe and appropriate to the needs of the party. In addition to the considerations made for day visits, the party leader should also consider:

- Issues surrounding the social interaction of young people in accommodation.
- Particular preparation of curriculum materials, teaching aids, allocation of chores, etc.
- Knowing the address and telephone numbers of the local doctor and hospital. (It is a good idea to have the same information for the coastguard, beach lifeguard, local weather information, etc., as appropriate.)
- In mixed or all-female groups, a female member of staff should be ready and equipped to deal sensitively with issues related to menstruation.
- Spare bedding and rubber mattress-covers may be needed.
- A sufficient number of leaders' rucksacks containing first aid kits and emergency equipment must be available.
- Maps of the area, route cards, compasses, whistles, torches, etc. may be needed.

NB: This list is by no means exhaustive. Individual residential visits will have different requirements and party leaders are advised to consider each visit afresh and as unique.

The party leader should also ensure that the roles, duties and expectations of accompanying staff and helpers are clearly defined and understood, so that everyone is involved and clear about what they will be expected to do. Preferably this should be accomplished through formal meetings rather than on an ad-hoc basis. This is particularly important for inexperienced staff and adult helpers, who may not appreciate that residential visits require a great deal of commitment and goodwill if they are to be successful.

11.2 On arrival

On arrival the party leader should meet the centre or accommodation manager, or someone of similar status, and agree on any routines or regulations that have not previously been agreed.

A room check should be made to establish any damaged or missing items. A list should be made and agreed with the management; the party leader should retain this list. The party leader should ensure that any requests or stipulations agreed in writing prior to the journey (e.g. leaders' qualifications, fire regulations, first aid arrangements, etc.) still apply.
11.3 Room allocation
The party leader should have a copy of the room layout before arriving at the centre. The young people should therefore have already been allocated rooms and need only to be shown the layout of the accommodation. The Young people should also be shown where the leaders’ rooms are and in which room the overnight supervisors will be.

11.4 Introductory briefing
A good first briefing for the young people is essential as it sets the tone, the ground rules and safety procedures for the stay. The briefing should include:

• Ground rules
The venue staff often gives these, as they have a particular understanding of the site. Teachers may also wish to lay down particular rules for pupils to follow and it is important that centre staff are also aware of these rules for pupils. Ground rules are likely to cover:
  (i) Safety
  (ii) General behaviour
  (iii) Boundaries
  (iv) Levels of appropriate interaction between males and females
  (v) Meal-times and bedtimes
  (vi) Other domestic issues, including duty rotas
  (vii) General programme
  (viii) Instructions for kit issue
  (ix) Who to ask
  (x) Smoking and alcohol

• Staff introductions
It may be appropriate for these to be made before the ‘ground rules’ are given. The introductions should include the following information:
  (i) Which staff are responsible for what
  (ii) Who the young people can ask questions
  (iii) Information about staff who are not at the meeting.

• Bedtimes
It is a good idea to set bedtimes before the visit goes ahead. Parents/carers can be asked to give written agreement to the bedtimes. It is worth considering the following points:
  (i) Which age groups go to bed when?
  (ii) Order of use of bathroom facilities
  (iii) In-bed time?
  (iv) Lights-out time?
  (v) Quiet time?
11.5 FIRE DRILL

It is important that there is a fire drill on the very first day, as early as possible – perhaps at the end of the arrival meeting. The young people and staff should be aware of the following information:

(i) How to raise the alarm;
(ii) Identifying the alarm sound;
(iii) Evacuation procedure and meeting point;
(iv) Escape routes;
(v) Any further information relevant to the venue, including the posted instructions often found on the backs of bedroom doors.

NB: It is essential to read the Fire Safety information in section 11.8 and Appendix K These set out important safety points, including safety rules, safety checks, evacuation, emergency services contacts, etc., and MUST be read.

11.6 Whilst at the centre

- **Bedtimes**
  (i) Supervision: (see section 6)
  (ii) Dealing with first-night excitement: Following an exciting day, getting pupils to bed can be challenging. It is worth devising a first night activity, which will calm the party down.

- **Homesickness**
  This is a common problem and should be carefully watched for. A full and structured programme can often help to alleviate homesickness.

- **Bedwetting**
  It is necessary to check for signs of bedwetting and for it to be dealt with sensitively and discreetly.

- **Medical watch**
  Participants with any particular medical conditions need to be monitored extremely carefully, bearing in mind the nature and demands of the activities (e.g. diabetes, where the young person may well be involved in strenuous activity and offered a different diet).

11.7 Upon departure from the centre

As on arrival, check all accommodation for damage, preferably with the centre or accommodation manager.

11.8 Fire safety

Dormitories and corridors in residential accommodation often present young people with a new and confusing experience. It is well known that people in unfamiliar surroundings, possibly in another country, will easily become confused and disoriented, especially when an emergency arises. A responsible adult should ensure that a set of clearly defined duties for action in an emergency is available, and that those to whom the duties have been allocated understand them and have experience in performing them.
These duties should include ensuring that:

- All exit routes from dormitories and other sleeping accommodation are clearly indicated;
- The posted instructions are clear and have been read to new visitors and are understood;
- Smoking is prohibited in the dormitories;
- Where appropriate, a leader of responsible age is appointed to each dormitory. They should possess a reliable torch where emergency lighting is not provided;
- A fire drill is held during the first day for new visitors;
- Where the centre does not have a clear and publicised policy on fire routine, the party leader should be required to formulate one on arrival;
- The arrangements for calling the fire brigade are adequate and understood and that someone has the duty to make such a call on hearing the alarm, where there is no member of the permanent staff already holding this duty;
- This person knows the location of the nearest telephones and the full address of the building/camp/centre to enable prompt response by the fire brigade;
- All occupants are familiar with emergency procedures and escape routes;

(See Appendix K: Fire Precautions and Evacuation Procedures, for further information).
12 Visits abroad

Note
This section must be read in conjunction with the guidance on supervision, planning and ratios earlier in this document. Expeditions abroad are dealt with in the section that follows this.

Background
Teachers and youth workers in Surrey have been regularly and extensively engaged in organising visits abroad for many years, ranging from the day trip to Dieppe or Boulogne, through commercial ‘package deals’ (including e.g. ski trips and other activity pursuits) to school/home exchanges in Europe and beyond. The educational value of such ventures may be very great and the notes of guidance that follow should not inhibit these activities. Visits abroad, however, require very careful planning and organisation, with considerable dedication and enthusiasm from staff involved. Considerations applying to off-site activities in the UK, detailed elsewhere in this document, apply equally to school journeys abroad. In addition, a number of other factors must be borne in mind and contingency plans should be made as far as possible to allow for hazards that might occur when travelling or staying outside Great Britain.

12.1 Checklists for visits abroad

Phase One – Initial planning
(also see earlier chapters on regulations, approval procedure, supervision, etc.)

(i) Plan well ahead
Forward planning for visits abroad will normally need to be started at least a year before the visit takes place. Where a booking has to be made with a commercial tour operator for a peak period, it may be prudent to make contact as much as 18 months ahead. Ensure the visit receives approval as outlined in Section 1.

(ii) Aims
The main aims and educational content of the journey should determine the type and venue of visit chosen, not vice versa. In the case of a reciprocal exchange, the parameters should be agreed with the foreign partner at an early stage. A named contact abroad is essential to the successful organisation of such schemes.

(iii) Framework
Initial considerations will include target numbers of youngsters involved, estimated total costs (including the expenses of accompanying staff), the number, sex, ratio of adult supervisors, the probable effect of the journey on normal routine (particularly for a school if it takes place wholly or partly during term time) and an outline programme for the visit. It is highly desirable for all journeys abroad that at least one accompanying adult should be a competent speaker of the main language of the country to be visited or of a major international language widely understood in the country (e.g. French in Belgium).
(iv) **The travel company**

Where a commercial tour company is to be involved, this should be bonded through ABTA or an organisation of similar standing and comparison should be made with similar packages offered by other operators. Apart from cost, consideration should be given to travel arrangements, insurance cover, the quality, suitability and safety of accommodation used (including e.g. fire risk, electrical safety and the possible need to share premises with other schools or youth groups of a different age range) and the experience and qualifications of staff at the foreign centre, especially where any activities of a potentially hazardous nature are envisaged. It is desirable to check the company’s track record with other establishments in the LEA or with the Consultant for Modern Languages and the Head of Strategic Risk Management. In the initial planning stage, it is important to establish exactly what the coach/ travel company will do and to agree any variation required to set itineraries.

12.2 **Phase Two – Detailed organisation/administration**

(i) **Supervisory ratio – accompanying adults**

Careful consideration should be given to this point and the activities to be carried out should be properly evaluated, to ensure that sufficient staff are available for supervision at all times. To implement this, a ratio of staff to young people of at least 1 to 10 will be needed for visits abroad. The majority of commercial school tour operators now offer an automatic supervisory place ratio of 1 adult to 10 paying young people. These supervisory places should only be available for members of staff or designated supervisory adults. Supervision and ratios are dealt with more fully in section 6, but must always reflect the findings of the risk assessment.

(ii) At least two members of staff should accompany any group abroad, one of them clearly designated as group leader. A mixed group must be accompanied by male and female adults except where pupils are less than 11 years of age (i.e. year 6 and below), in which case they may be accompanied by two female staff (see section 6.14). The group leader should be an experienced teacher/youth worker and should be satisfied that there is sufficient experience and expertise in the staff team accompanying him/her.

(iii) Adults other than members of staff (e.g. husband/wife of teacher/ youth worker, parent, governor, student, foreign language assistant) may usefully accompany the group, but the ultimate responsibility for the young people’s welfare and safety lies with the teachers/youth workers involved and in particular with the party leader. Adults may only accompany the party as supervisors if they have no other commitment throughout the whole of the visit. A second teacher/youth worker should be designated as a deputy leader, be fully associated with the planning and organisation of the visit and be prepared to take responsibility for the group in case of emergency.

(iv) All adults should have been clearly briefed by the party leader so that roles and duties and responsibilities are understood and accepted. All adults should be aware of their own role and duties, both to ensure that they feel involved and to give adequate supervision.
12.3 Group composition/parental involvement

Information by letter to parents about the proposed educational visit should, in the case of visits abroad lasting more than two days, be complemented by a parents’ meeting at which issues can be clarified, questions answered, etc. This is especially important in the case of a school/youth exchange. A model agenda for such a meeting is outlined in section 7. Many establishments prepare a booklet for parents, with detailed information about plans, requirements, etc. details of insurance should also be available to parents.

Ground rules for the visit should be clearly established at an early stage. Parental consent forms (see Appendix D) should be completed and relevant medical/diet details should be obtained in good time before the journey begins. The party leader must compile a full list of names, addresses and contact telephone numbers of parents/carers in case of emergency. A copy of this list should be left with the home-based contact and the duty officer (see section 9).

12.4 Financial arrangements

All financial arrangements must be consistent with the Authority's policy on charging.

Steps should be taken at an early stage to secure an initial deposit from party members and to allow for regular payment by instalments by agreed dates. Party leaders will normally open a separate school/youth centre bank or building society account for the purpose, into which all monies are paid. Receipts and payments must be fully documented and the account details must be available for scrutiny by the head of establishment or LEA representative at all times. A teacher/youth worker should never – even temporarily – pay such money into his/her own account. When initially estimating the overall cost of a journey, it is best to include all expenses (including e.g. pocket money) and to give a realistic global figure to parents. A refund in the case of an over-estimate is always more acceptable than a supplementary charge.

It is good practice for party leaders to have a contingency fund from which they could meet unexpected, minor costs.

12.5 Insurance

Please refer to Section 2: Insurance Arrangements, for details of insurance cover.

Within EU countries, reciprocal health insurance arrangements apply. It is important that parents should obtain a Form E111 (Certificate of Entitlement) in respect of their children from their local DHSS office or post office in good time before the journey begins. Group leaders should collect form E111 in respect of all members of the group so that they are readily available if required in the foreign country.

NB: It is advisable to take photocopies of Form E111 (together with the originals) when travelling to an EU country. The original should always be retained by the party leader and a copy be given to authorities abroad (e.g. local sickness insurance office) if necessary.

For foreign students staying with families in this country the usual householder’s insurance covers risks to visitors, but parents and staff should be advised to check their cover.
12.6 Passports and visas

Where a collective (group) passport is used, remember that only British nationals may be included. Check early, and carefully, on the nationality/place of birth of all young people and staff travelling with the group and remember that passport regulations change from time to time. It is advisable to make use of a collective passport whenever possible, since the loss of an individual passport abroad can be extremely inconvenient.

In general, collective passports are valid for groups of between 5 and 50 youngsters under the age of 18, travelling abroad in the charge of a responsible leader. The party leader and deputy leader must be over 21 and hold individual British passports.

Young people who are ineligible for inclusion on the collective passport must have their own individual passport. Staff and young people who hold other than a British passport may require a visa in some cases where this is not required for British passport holders. Check early, i.e. at least 6 months in advance, the passport and visa requirements for all members of the party. Where youngsters aged 16-18 (or who will become 16 by the date of return to the UK) are entered on a collective passport, they will additionally require identity cards. (For some countries, such cards are required for all pupils). Blank cards are supplied by the Passport Office for completion, addition of photograph and countersignature by the head of establishment (not party leader). These must be returned to the appropriate passport office with the application for a collective passport, cheque and supporting letter from the head of establishment.

It is essential to check whether visas or other documentation will be required for countries being visited or passed through. This should be checked with the Consulate or Embassy of the country to be visited. For groups travelling outside major tourist areas, advice could be sought from the Foreign Office or Passport Office.

12.7 Visa exemption for school trips within the European Union

Visa exemptions can be secured for pupils who are nationals of countries outside the European Union and who are travelling as part of a school party from the UK to or through another EU country. (See Appendix O for full details.) Note that this applies to school groups only: it does not apply to youth groups.

12.8 Factors specific to organisation of exchange visits

Exchanges (with home-stay) normally operate within the context of a developing relationship between two institutions in which mutual trust and respect play an important part. Planning should be carried on systematically by the party leader with a reliable contact abroad, wherever possible known personally to him/her. The support of the head of establishment, other staff and parents (e.g., PTA) in the whole enterprise is often vital. 'Matching' of young people is the key to a successful exchange and should be given sufficient time and thought. It is a sensitive task, for which clear criteria should be agreed, and the young people and families should normally be put in touch with each other well before the exchange takes place. Information on participants should be checked by an independent 'arbiter'. Details of the exchange visit should be agreed beforehand, as should reciprocal arrangements for visits, excursions, etc., where these are organised by the schools or youth groups rather than by individual families. It is important that accompanying staff should get to know all the young people in their charge before leaving, and that they should make themselves known to the foreign staff and parents on arrival. Particularly where accompanying staff will not meet the group regularly, they should telephone host families at a reasonably early stage and visit as many of the families as possible. Advice on reasonable levels of pocket money is usually welcomed by parents.

Further advice can be sought from the Consultant for Modern Languages.

Essential: See Appendix C for further advice
12.9 Phase 3 – Final checks

Clothing, luggage, valuables and ‘prohibited items’

(i) The party leader will be in charge of a large number of items such as tickets, collective passport, travellers’ cheques and cash. It would be sensible to divide these and other valuable items between staff/adults in the party.

(ii) General: Check maximum weight and number of bags allowed by tour operator. For younger children, a ‘kit check-list’ can be stuck inside lid case. Ask parents/carers to conduct a ‘trial trek’ with fully laden cases, etc., the evening before departure – port transfers, etc. may involve long walks!

Warn the party well before the date of departure about any customs restrictions that might apply. Party leaders must ensure that all young people know that under no circumstances should packages be carried for third parties and that luggage is never left unattended.

12.10 Travel tickets, passports, etc.

Wherever possible, these should be held by the party leader and given out to young people for the shortest possible time. Before leaving for the port/airport, accompanying staff should check that for all members of the group they hold the relevant insurance documents, parental consent forms, medical certificates as appropriate, Form E111, travel tickets, passports and visas, where required. If a passport is lost, contact the local police and the British Consul, who can issue emergency travel documents.

12.11 Medical precautions

The party leader must ensure that participants and their parents are informed of any inoculations or immunisation treatments that are required or advised for particular countries and ensure, via a medical consent agreement or similar, that these have been carried out.

The party leader should be aware of any particular health risks associated with the countries being visited, including HIV/Aids, and brief the party as appropriate.

12.12 Sporting and recreational activities and cultural attitudes

(i) Swimming: Leaders must be aware that life-saving cover may not be present and therefore you should make your own arrangements. This must involve active supervision and a qualified lifesaver must be present.

(ii) Motorbikes and mopeds: The laws abroad governing motorbikes and mopeds are often very different from the UK. In many countries, crash helmets are frequently not worn. A clear policy, of which parents are aware, must be established.

(iii) Hazardous activities: The same regulations for approval apply. As qualifications will obviously differ from those in the UK, you should contact the Head of Strategic Risk Management for advice.
12.13 Briefing – Local factors

Please see Appendix K with regard to appropriate Fire Precautions and Evacuation Procedures.

Groups should be carefully briefed beforehand about changes of diet that may cause minor illness and the potential effects of changes in climate. It is prudent to stress the importance of hygiene and careful eating habits.

Cultural attitudes and the law regarding alcohol may be very different from the UK. Be aware of them and establish an appropriate policy. Additionally, the different cultural background is important and groups should be aware of behaviour that may be misinterpreted. Parents should also be informed of any cultural differences that could have an effect upon their children.

Great emphasis should be placed on traffic risks abroad, particularly when crossing roads. Work should be done on this before the visit, with reminders when in the foreign country (e.g. mandatory use of recognised crossings). Younger children should not be allowed to cross roads unsupervised in the early stages of the stay.

With exchange groups, potential problems of homesickness should be discussed in advance. Instructions should be given regarding telephoning home from the foreign household but parents should be told that too frequent telephoning by them can increase homesickness. As a precaution, the full home telephone number (from foreign centre) and the telephone number of the contact teacher abroad should be written down and held by each person involved in the exchange.

12.14 Supervision of pupils on the journey and in foreign centres

Accompanying staff must accept responsibility for the good behaviour of their groups both on the journey and while abroad.

It will greatly ease supervision if each accompanying adult takes responsibility for a sub-group, with the party leader or deputy being personally responsible for any young people who might create difficulties. Each sub-group leader will naturally have a list of the young people in his/her group, while the party leader has a complete list, augmented by a card for each person, giving personal details and a passport-sized photograph. If a member of the party should go missing the local police would then have some concrete details to work from. Impress on everyone that if lost they should go for help to a public building (shop/museum) or find a person in uniform and not approach passers-by in the street.

12.15 Emergencies – the duty officer system

The head of establishment must ensure that a home-based contact (for minor problems) and a duty officer (serious incidents) are identified. The duty officer should have sufficient experience and status to be supportive of the party leader. Section 9 has full details of the system and must be read.

12.16 Support from the British Consul

The group leader should, before the visit commences, obtain from the Foreign Office, London (Monday to Friday, telephone 0870 6060290) the address and telephone number of the relevant British Consul. In the event of death or serious injury to any member of the party, the British Consul should be contacted immediately. He/she will inform the Foreign Office, which has a 24-hour open line service. Details of UK Embassies overseas can also be easily found on the Foreign Office website: www.fco.gov.uk. Unfortunately, a Surrey school was involved in a coach crash in France some time ago. The school received excellent support from the British Consul in Paris.
12.17 Travel advice

The Foreign Office website, www.fco.gov.uk, offers travel advice for specific countries and regions. It is possible to subscribe to the site (free) to receive updated information on a country or countries. Using this site is strongly recommended. As well as advice on countries, it contains very useful information and tips about travelling abroad.

12.18 Medical treatment

In the case of a medical emergency in an EU country, full use should be made of Form E111 reciprocal health insurance arrangements, but these may still require payment to be made for medical treatment, with all or part of the cost being reclaimed subsequently. A substantial cash float (in foreign currency) should always be available for this purpose.

NB: Where medical treatment is given abroad, it is essential that duplicate copies of all doctors’ letters, ambulance certificates, bills (e.g. for medicines), vouchers, hospital admission forms, blood transfusion certificates, etc., should be kept for the UK insurers.

If it is necessary for a sick or injured person to be separated from the remainder of the group (e.g. to receive hospital treatment), one of the adults who is accompanying the group should always remain with or close to, the sick or injured person.

If an illness or injury is serious or likely to involve the patient in a lengthy hospital stay abroad, then a parent should be brought out. Your insurance cover must include this 24-hour emergency provision. N.B. You must ensure that the insurance company authorises a parent / carer travelling out and that the parent fully understands what he or she is covered for. (e.g. accommodation) and what is not covered. A good insurance company will usually help with arrangements.

12.19 EU directive on package travel

If you are organising the journey yourself and not using a bonded tour operator, this directive may affect you. Please refer to Appendix Q.

12.20 Timing for key activities

The following list includes key points that will be common to most ventures, but must not be read as definitive, as the requirements of individuals will vary.

Do plan well in advance, normally at least one year ahead.

However, maintaining enthusiasm amongst young people, parents or sponsors over too long a period is difficult.

18 months ahead

First steps

- Find exchange school/youth group or study tour company’s/agent’s literature and decide on visit

Getting support and approval

- Approach head of establishment for schools and Area Manager for youth groups and colleagues (describe aims of visit, its potential value to participants).
- Investigate possible sponsors
- Head of establishment or Area Manager secures any necessary approval

Background

- Exchange full background details with exchange group and speak to other parties who have previously used the agent/tour operator.
12 months ahead

Planning
– Choose age group, depending on aims of visit
– Decide on numbers
– Decide on length of visit and dates
– Arrange a balanced team of suitable staff for the visit
– Agree financial arrangements, cost – including contingency and administration
– Plan programme – study and leisure time

Approval
– Prepare written statement for discussion and agreement with head of establishment – aims, membership of party, staff, dates, travel and finance
– Seek written approval from head of establishment, Governors and LEA, where appropriate, before any deposits are paid.

Launch
– Design application form and explanatory letter to parents/carers/young people
– Make arrangements for collection of monies
– Agree timescale for payment of deposits and instalments to end well before departure/due date.

12 months – 9 months ahead

Personal and paper publicity/launch of visit with support of colleagues and parent support group if necessary.

Selection of group
– Read applications and select group
– Investigate sources of finance for disadvantaged young people
– Issue letter confirming visit will go ahead
– Issue personal details form to young people
– Complete initial arrangements with exchange group or travel company/agent, taking advice from head of establishment and colleagues as necessary
– Complete arrangements for sponsorship/support programme with sponsors or parent/carer support group

6 months ahead
– Issue updated materials – letters, new publicity to maintain momentum
– Build visit and background into lessons and curriculum (schools) or specific activities within the youth group
– Determine the passport and visa requirements of all members of the party, especially the arrangements for those staff and young people who hold other than British passports
– Check passport and visa arrangements and make necessary applications
– Book transport
– Make preliminary site visit.
3 months ahead
- Involve parents/carers – call full parents’ meeting to brief them on visit, introduce staff
- Issue emergency parental consent forms and contacts forms for completion and packing lists
- Issue programme and discuss planned activities – use photographs and slides if possible
- If sharing transport with exchanges, check the necessary authorisation has been sought
- Obtain documentation – passports, insurance, E111 forms
- Check availability of resources, stationery, equipment, first aid, foreign currency
- Full financial check – payments due from youngsters, payments made to agents, etc.
- Check insurance cover is already effected, for possible cancellations

1 month ahead
- Collect all outstanding monies
- Order all foreign currency
- Assemble and check papers, tickets, emergency forms for groups and home contact, resources
- Arrange regular meetings with staff going
- Final check of travel and accommodation
- Final check of arrangements with head of establishment
- Check arrangements for emergency procedures

On return
- Prepare report for head of establishment and colleagues
- Close financial accounts
- Deal promptly with any insurance claims, complaints and accident reports
- Write letters of thanks
- Debrief young people and collect their comments
- Have follow-up work/activities
- Parents’ evening/display, souvenirs, photos, slides
13 Overseas expeditions

Overseas expeditions typically take place in remote areas of the world and/or in developing countries, both of which present significant hazards and organisational challenges not normally encountered in the UK or Europe. This guidance has been prepared in association with the Outdoor Education Advisers’ Panel and it is hoped that most LEAs will adopt it ensuring a consistent expectation of what expedition contractors should provide.

It is the view of Surrey LEA and the Advisers’ Panel that such experiences can be of great value, indeed the experience of a lifetime. It is important that we challenge and not over-protect those for whom we are responsible. However, in order to do this effectively, we must properly assess, prepare for and manage the risks involved.

Participants in such ventures, as well as those with parental responsibility, need to understand that they are potentially hazardous and that they require the acceptance of a certain degree of risk.

This section contains comment on:

- target expeditions
- who is responsible for advice, guidance and approval
- what responsibilities and accountabilities need to be considered
- leader competencies.

13.1 Target expeditions

Whilst it is hoped that these guidelines can provide generic information for all expeditions, it is targeted at a particular style of expedition that:

- in essence remains a school/college/youth group expedition
- is developed or commissioned as an educational package for the under-19s (or under 26 in some special needs contexts)
- has trekking into remote areas as a component, which may involve fieldwork and community projects
- visit or journey through one or more challenging environments
  
  Note: Challenging as compared to the current experience of the young people concerning high mountains, jungle, deserts or similar
- is placed in a considerably contrasting culture(s) to those of the participants
- is usually in the range of two to four weeks’ duration (although this will vary)
- is designed to be of a team-building nature
- raises young people’s awareness and skills in assessing and managing risks.

It is not

- an individual or small independent group’s self-led expedition
- an over-18 expedition (except as above, in Special Needs situations)
- an extreme challenge in hazardous environments
- a highly technical expedition
- an expedition requiring the young people to manage unknown risks; making decisions without training or relevant information; or to manage known risks without the support of a competent leader
Important note

The latter and similar expeditions would require additional and different risk assessments, guidance and advice, for example from The Royal Geographical Society’s Expedition Advisory Centre, or the Code of Practice for Youth Expeditions produced by the Young Explorers Trust.

Hazards and the risk they involve must be seen holistically when considering the welfare of the group or an individual. That is, they could involve physical, emotional, cultural, psychological or similar dimensions in parallel, rather than standing alone.

13.2 Who is responsible for advice, guidance, statutory risk assessments and approval?

It is essential to determine at the onset who has the ‘duty of care’ of the young people and staff concerned. This will determine the accountability, roles and responsibilities, including providing guidance and approval for each of the agents in the process. Typically these agents might be:

- the school, youth group or educational establishment
- the expedition group (non-commercial) that draws young people from educational establishments and/or their community
- the commercial company, expedition group or travel firm.

LEAs – Local Education Authorities:

- Have particular responsibility for community and voluntary controlled schools.
- They may also have responsibility for the youth service and the groups they control and Duke of Edinburgh and other expedition groups. This will vary from area to area.
- Where LEA systems are ‘corporate’, i.e. agreed across county, city or authority areas, then this would also include ‘partnership’ groups such as Young Offenders or similar project groups and groups initiated from agencies such as social services.

Voluntary aided, non-maintained and foundation schools

Here the governing body has the responsibility. Many such schools have a service level agreement or similar with the LEA, which may mean that the LEA systems are used. If not, systems of at least equal quality should be in place.

Important note

Should litigation arise each of these sectors may be asked to show how they respond to these responsibilities in a comparable way to other sectors. A dual system, where one could be shown to be inferior to the other, could lead to a challenge of negligence or similar in the event of an incident or accident.

Where the educational establishment or group initiates the activity, there will be a ‘reasonable expectation’ by parents/carers that the activity is approved. This is also true if the activity is advertised or recommended through them. This means that if the establishment is involved in any way, then the LEA or governors are likely to be considered accountable in law.

If the opportunity is made available through the establishment, but no responsibility is taken, then it must be made very clear that it is not an official or approved activity. Exact roles and responsibilities or relationships will have to be set out. It is important to limit the information given in these circumstances.
13.3 What are the responsibilities and accountabilities?

Third party providers, commercial companies, expedition groups and travel firms offering an ‘expedition’ package

- Where different agencies are involved, a written contract with roles, responsibilities and agreement recorded should be prepared, e.g. the school, LEA and commercial company.  
  **Note:** School staff accompanying the expedition do so as employees of the LEA/school. They should not compromise this situation by agreeing an alternative relationship or signing a contract. Parents and young people should not sign any form of contract that might compromise this relationship.

- Written risk assessments and operating procedures are in place and agreed, with a clear management ethos or culture, in order to show their duty of care to leaders and young people.  
  **Note:** these must include all elements of the expedition, including any rest and recuperation periods or activity choices offered.

- The prior knowledge and experience of the leaders must be provided. This includes the location area for the expedition and routes to be used.

- Written and agreed emergency procedures and contingency plans are in place. It needs to be accepted that not everything will go to plan.

  **Important note – evacuation and rescue**
  - It is essential to have an accurate knowledge of the scope and limitations of the rescues services before making decisions on the viability of an area or specific route and its suitability for the group concerned.
  - It is essential to understand the implications of any individual or group evacuation if an incident or injury occurs.
  - It is an essential part of any risk assessment of an area or route that the rescue and evacuation procedures are fully considered. In this way it should be extremely unlikely that an educational expedition, of the target group described earlier, would enter areas where the difficulty of evacuation could make an injury or illness life threatening. Similarly, if a life-threatening injury or illness could not be evacuated effectively, then the area should also be considered inappropriate.

- Commercial companies should illustrate the financial systems and financial bonding arrangements they operate to protect all aspects of the expedition’s finances, including training weekends, etc. An itemised account should be prepared, balancing income and expenditure. This should be available to parents.  
  **Note:** Where the desire to undertake the expedition is generated by the school or group, they should consider formulating a specification, or outline what they want, and then obtain quotes/tenders for the work (assisted by the LEA risk assessments, financial regulations and insurance arrangements).

- Where the leader is external to the group then sufficient time in training must be made available to:
  - become personally acquainted with the young people and their leaders to decide if they can work together, as well as to formulate aims and expectations;
  - make a proper assessment of individual, group and assistant leader competencies.
• Written child protection procedures should be available and evidence of policies in action, e.g. Criminal Records Bureau/male/female leader ratios for mixed groups/accommodation/camp security.

• Commercial companies should illustrate the known impact of their own and other groups in the same area, i.e. number of expeditions, expedition ‘overload’. The Young Explorers Trust/British Ecological Society Environmental Responsibility for Expeditions is recommended guidance.

13.4 Responsibilities carried out in partnership

The responsibilities to be carried out in partnership with others should be recorded as part of the contract between the school or group and the third party provider:

• The establishment, with the active involvement of the young people, or clear aims, expectations and purposes, in accordance with their age, ability and needs, and the principle of ‘minimum impact’ on the area to be used.

• Young people charters/contracts/codes of behaviour, etc. are also recommended.

• Clear and detailed information to parents. Their consent must be based on a full understanding of the expedition characteristics and programme. Without this knowledge regarding activities or the nature of the supervision, the ‘consent’ may not be valid in law. For example:
  - codes of practice
  - communications systems
  - the pace and intensity of the expedition
  - injury, illness, incident and emergency procedures
  - the leader’s qualifications and experience, including in the precise location for the expedition.

  **Note:** It is recommended that it is explained that whilst every step will be taken to ensure the safety of the young people, such activities are by their very nature hazardous. It is important to identify the risks and have them acknowledged.

• Clear guidance needs to be given on insurance and indemnification, including public liability and personal accident. The school or group would need to ensure that its own or the LEA’s liability insurance extends to the expedition. This is best obtained as a written statement.

• A comprehensive training and induction programme should be planned to identify and improve:
  - appropriate levels of fitness for the expedition concerned
  - group dynamics and team work
  - personal confidence in the skills required
  - risk assessment and risk management awareness.

  **Note:** Expedition fitness is quite specific and requires progressive and well-structured training.

• Considerable research time is required to be prepared for the expedition, including providing information on:
  - medical considerations and arrangements particularly essential
  - transport considerations and arrangements for effective
  - communication systems, availability and options emergency planning
  - insurance requirements
  - local financial arrangements
- accommodation possibilities and quality
- cultural aspects and their likely impact on the expedition
- local issues, positive and negative (e.g. the local crime situation).

- Agreement over reducing the environmental impact of the expedition to a reasonable level.

### 13.5 Leader competencies

In this expedition context it would be reasonable to see leadership and duty of care in two forms. It is essential that the technical and pastoral aspects of the expedition leadership are understood:

- **technical competence**
  - to plan, lead and manage the activities undertaken in an active, on-going risk management context. This person would have the level of experience and qualifications outlined in the matrix (see below)

- **pastoral competence**
  - to manage the care, welfare and experience of young people successfully according to their age, experience and needs. This person would have a nationally recognised qualification (teacher, youth worker, lecturer, for example), or proof of significant experience of working successfully with similar groups.

Just as pastoral competence is developed through positive experience, technical competence must be complemented by the experience of making active judgements/risk assessments in realistic contexts, gaining and developing the leader's experience.

- In all circumstances relating to the welfare of the group it is the pastoral or group leader who has the final say. For example:
  - the technical expedition leader may decide the group is not able to go on and would explain their reasoning. The pastoral leader may ask challenge their reasons, but would not override any such technical decisions;
  - the pastoral/group leader may ask for an activity to stop, or request a rest or an alternative where their greater knowledge of the group health and welfare leads them to such a decision. The technical leader may now ask for reasons, but would not override any such decisions.

- Should a leader have both technical and pastoral competence, they need to be very clear about their responsibilities. Dual competence cannot mean a reduction in ratios: they would need a competent assistant.

**Important note – Supervision**

It is assumed that the young people will be directly supervised throughout their expedition. Should the aim of the expedition include more self-reliant activity, the decision to move to indirect supervision must only be made on observed evidence of the competence of the whole group.

Indirect supervision still requires considerable monitoring and the capacity to intervene quickly and directly.

Any remote working where the group, or part of the group, does not have quick and direct access to the technical expedition leader or pastoral leader is inappropriate for this type of expeditioning and should not occur.
Ratios will vary considerably, based on the risk assessments in the particular environment and if the technical-pastoral roles are split. The major considerations are:

- the ratio of leaders/guides to participants must reflect the risk assessment process, taking account of the group’s age, ability and experience; for example:
  - a minimum of two leaders (see technical/pastoral comments)
  - a good practice guide of one leader to three/four participants
  - a maximum recommendation of one leader to six participants
- there should be a balance of gender to reflect the group.

13.6 The matrix

In presenting the matrix of technical leader competencies, its principles need to be understood.

Where the matrix does not cover the exact terrain or circumstances, these principles need to be applied to that context.

The basic principles are:

- a leader should be able to demonstrate current good practice
- there should be evidence of that competence through an assessment or judgement, made by a person of sufficient status, qualification and/or experience to make that judgement, and be recognised as being able to do so.

Two principal routes are taken in this matrix

Recognised qualifications PLUS additional experience and local knowledge. The matrix accepts and promotes the value of a baseline of technical competence given by a governing body award such as a mountain qualification. It also accepts that in these contexts it is insufficient without additional experience of the activities in the region concerned and the need for essential local knowledge. These elements need to be seen as complementary requirements.

Where there is no recognised qualification (in the specific terrain, region or culture) then it is most important that principles are applied as realistically as possible.

- Where is the evidence of current good practice/competency?
  for example the person should be an expeditioner known to recognised expedition groups or major agencies. Their competence would have been evidenced by others able to make a judgement.
- The person(s) making the judgement would need to be nationally recognised by others of such a standing; or part of an organisation that has such a clearly recognisable standing. In the absence of the moderation of an award, this person should be external to the expedition group or company concerned.

Applying the principles in this way allows for a realistic comparison to the first route in terms of the consistency of judgements made.
<table>
<thead>
<tr>
<th>Activity/hazard level</th>
<th>Terrain</th>
<th>Expedition Leader qualification</th>
<th>Expedition Assistant Leader qualification</th>
<th>Additional experience</th>
<th>Essential local knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day Treks and Trekking to fixed or mobile camps</td>
<td>Walking terrain in summer conditions</td>
<td>Summer ML European Mountain Leader</td>
<td>Assessed competence in this terrain, e.g. Summer ML training where assessment of competence available or Walking Group Leader (assessed)</td>
<td>journeying or expeditioning in the region concerned</td>
<td>* the availability and efficiency of: - transport systems - medical facilities - emergency support - guides - accommodation</td>
</tr>
<tr>
<td>Day Treks and Trekking to fixed or mobile camps</td>
<td>Scrambling terrain requiring the use of ropes or fixed cables; in summer conditions</td>
<td>MIA</td>
<td>MIA training or summer ML plus SPA</td>
<td>journeying or expeditioning and scrambling in the region concerned</td>
<td>* local culture: - advantages/issues - crime - gender - religions</td>
</tr>
<tr>
<td>Day Treks and Trekking to fixed or mobile camps</td>
<td>Walking terrain above the snow line (non-glacial)</td>
<td>ML Winter or EML where a winter component has been assessed</td>
<td>ML Winter training EML training with winter component</td>
<td>journeying or expeditioning in the region concerned</td>
<td>Jungle travel</td>
</tr>
<tr>
<td>Day Treks and Trekking to fixed or mobile camps</td>
<td>Scrambling terrain requiring the use of ropes or fixed cables including snow and ice conditions (non-glacial)</td>
<td>MIC</td>
<td>MIA with Winter ML</td>
<td>good awareness of the region and its routes</td>
<td></td>
</tr>
<tr>
<td>Day Treks and Trekking to fixed or mobile camps</td>
<td>Mountaineering requiring the use of ropes or fixed cables including glaciated snow and ice</td>
<td>UIA Guide</td>
<td>MIC</td>
<td>good awareness of the region and its routes</td>
<td></td>
</tr>
</tbody>
</table>
13.7 The use of guides

If the use of guides is to be considered as a part of the leader competency in that they supply some of the local knowledge, then similar questions must be asked as far as is practical:

- Where is the evidence of current good practice/competency of the actual guides to be used?
- Are they a recognised company or individual guide? Have they been used before and to what effect? Evidence would need to be collected, in particular where there is no recognised guiding system.
- Guides are normally employed for specific route-finding and technical knowledge, and do not have any direct pastoral responsibility.
- It needs to be remembered that a good guide can complement the leader but not replace them.
- Where there is not good evidence of their competence then the leader should have sufficient experience and local knowledge to manage without them. This would need to be considered before routes are agreed.
- Where an additional risk assessment is required to manage changing circumstances such as weather, fitness, injury, local conditions, etc., the leaders must satisfy themselves that the guide and local information are of sufficient quality for them to go ahead, or plan an alternative.

13.8 The use of porters

- Where the length of the expedition requires porters to support the carrying of equipment, the leader must ensure that sufficient numbers are available, including the ability to cope with incidents of injury or sustained poor weather.
- The experience and fitness of the young people, allied to the demands of the terrain, environment and weather, should determine the weight of the pack or load they can carry.

13.9 Additional leader requirements

- A minimum four-day First Aid at Work certificate is required appropriate to working outdoors. Further, in almost all circumstances, a two-day ‘far from help’ or expedition first aid certificate is also required. (This will be dependent on speed of access to medical help.)
- The assistant leader’s qualification should be sufficient to successfully apply the emergency or incident management strategies and evacuate the group from the area should the leader become incapacitated.
- Where activities move beyond walking/journeying, e.g. into water-based activity, then the LEA/governing body of sport qualification guidance should be followed or agreed.

13.10 Additional recommendations

- An ‘apprenticeship’ scheme is recommended for leaders, from assistant to deputy to leader. This is an essential ingredient to gaining experience.
- For this form of expeditioning a good knowledge of the area concerned is required. The Additional Experience column of the matrix illustrates the experience required, related to the leader's overall competence.
13.11 Other responsibilities of the school

Quite correctly, schools will make mention of significant expeditions in the school prospectus and other information about the school. It is essential that the school leaders organising these expeditions, with or without a commercial provider, are given active support. This might include time off for preparation, etc., and/or funding for specific, relevant courses (e.g. First Aid).

As the planning cycle for a major expedition is likely to be at least two years, it is possible that the original leader might have to withdraw before the expedition takes place. The school should prepare for this by having a deputy leader or leaders who are able and willing to see the expedition through.
Outdoor education in higher-risk environments and hazardous activities

Adventure and challenge are important elements in the development of the young person, as are learning to be responsible for oneself and others. Whilst recognising this, however, it is vital that young people should not be exposed to unnecessary danger, and any risk associated with an activity should be commensurate with age, experience and ability.

The following pages offer guidance on qualifications and procedures for a number of activities, but it is stressed again that this guidance cannot be exhaustive and the quality and experience of leadership is paramount in ensuring that outdoor activities are acceptably safe, educational and enjoyable.

14.1 Higher-risk environments

It is impossible to be specific about what constitutes a high-risk environment. In general terms, however, water, remoteness, the danger of a fall and underground ventures would be considered to be higher risk. It is nevertheless obvious that there is an enormous difference between an activity such as adventure caving and making a tourist visit to an established show cave.

Similarly, a coastal walk in good conditions following a way-marked route away from edges of cliffs is vastly different from negotiating an unstable, unfenced track that involves being close to a dangerous drop.

A preliminary visit will usually help the party leader to determine the level of risk involved and further guidance can be sought from the Head of Strategic Risk Management.

Where a visit is primarily for field studies, the Consultant for Geography will be pleased to offer advice.

14.2 Hazardous activities

Grouped as land-based, water-based or airborne, the following guidance refers to recognised and established activities. New activities, particularly those of a problem-solving nature, are continually appearing and specific advice should be sought if they seem to be of a potentially hazardous nature.

Party leaders should remember that, whilst they may be neither experienced nor qualified in a particular activity that is being led by an instructor, they do have considerable expertise of working with young people and if they believe that an activity is not suitable, they should have the confidence to intervene at an appropriate moment and stop the activity. They should report any such action to the head of centre. Similar action should be taken if instructors show a lack of understanding of or empathy with the group. The dividing line between encouragement and coercion is narrow. Teachers and youth workers should use their professional judgement and their knowledge of the young people to ensure that the activities remain beneficial and educational.

14.3 Qualifications and county letters of recognition

The following activities will usually require an associated qualification endorsed by the relevant national governing body.

In certain circumstances, SCC offers the opportunity to its staff to gain approval via a letter of recognition. Such approval is usually limited by level or environment, is not recognised nationally (although neighbouring LEAs are likely to accept it) but in all cases can only be gained following:
A recognised training course
An assessment showing proof of competence.

Surrey County Council staff holding such approval are urged to achieve national qualifications where they exist.

Surrey County Council Community Services (youth service section) run the following centres, which are recommended to school and youth groups:

- High Ashurst Outdoor Education Centre
  - Mickleham
  - Dorking RH5 6DQ
  - tel.: 01372 377239
  - bookings: 01372 378647
  - email: staff@highashurst.co.uk

- Henley Fort Outdoor Education Centre
  - The Hog's Back
  - off The Mount
  - Guildford GU2 5RH
  - tel.: 01483 562636
  - bookings: 01372 378647
  - email: staff@highashurst.co.uk

- Thames Young Mariners
  - Ham Fields
  - Riverside Drive
  - Richmond TW10 7RX
  - (offers water-based activities primarily, but also some that are land-based)
  - tel.: 020 8940 5550
  - fax: 020 8940 7052
  - email: tym@tym.virgin.net

14.4 Safety on land expeditions

Checklist

The group
- Can members of the group use a map and compass with confidence in all the conditions likely to be encountered and has a route card been prepared giving escape routes, bad weather alternatives and estimated time of arrival?
- Is at least one member of the group familiar with local conditions and have local and general weather forecasts been studied?
- Is the group trained in mountain walking and are the procedures for group movement on free, narrow ridges and steep and broken slopes well known?
- Is the personal equipment of each member of the group suitable for the terrain and for all the weather conditions likely to be met?
- Has the camping and group equipment been checked and are members knowledgeable and skillful in its use under difficult conditions? Are the tent groups experienced in campcraft and cooking skills? Are they familiar with the planning and preparation of hot meals under difficult weather conditions?
- Are the members of the group conversant with accident procedures and have they been given routine and essential information in case of emergency?
- If snow and ice conditions are likely to be experienced, are all members equipped with ice axes and crampons and are they trained to use them?

The leader
- Do the leader's knowledge, skills and experience comply with nationally accepted standards of mountain leadership?
- Does the leader know the individuals in the group well enough to forecast their reactions under trying and physically demanding conditions?
- Is the leader competent in the treatment of exposure and in first aid?
- Does the leader carry the additional equipment recognised as being essential to the safe conduct of the party at all times?
- Is the leader qualified for the particular environment?
- Has a risk assessment and risk management process been followed?
General
Are the nature, purpose and aims of the expedition clearly understood by all concerned? Has the group been involved in putting together the risk assessment?
Have the parents been informed and provided written consent and are they fully aware of the activities involved?
Has the insurance of voluntary helpers been considered?
Has the expedition been cleared with landowners or official departments?
Is the party familiar with the relevant country and fieldwork codes?

14.5 The Mountain Code
A detailed understanding of the Mountain Code and practical observance of its terms are required by all groups venturing into wild country.

<table>
<thead>
<tr>
<th>Be prepared</th>
<th>Select equipment after asking advice and learn how to use it.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Have knowledge of basic first aid.</td>
</tr>
<tr>
<td></td>
<td>Know how to navigate properly.</td>
</tr>
<tr>
<td></td>
<td>Attain a standard of physical fitness suited to your ambition.</td>
</tr>
<tr>
<td></td>
<td>Follow the Country Code.</td>
</tr>
<tr>
<td></td>
<td>Always carry waterproofs, spare sweater, map, compass, whistle and some food, a first-aid kit, emergency rations, and a polythene survival bag for emergencies. In winter increase clothing and food and carry a good torch, mitts and balaclava.</td>
</tr>
<tr>
<td></td>
<td>Make sure the expedition you are planning is not beyond your training, experience or fitness. Stay on known routes until you have a good knowledge of an area, or become proficient in route-finding skills.</td>
</tr>
<tr>
<td></td>
<td>For the inexperienced, travelling alone is inadvisable. It is sound practice to leave word of your route and report your return.</td>
</tr>
<tr>
<td></td>
<td>Check the local weather forecast before you leave your valley base.</td>
</tr>
<tr>
<td></td>
<td>Remember disused mines and quarries in mountain areas have no safety checks and should not be entered.</td>
</tr>
<tr>
<td></td>
<td>Only venture on to snow and ice when you have fully mastered the use of ice-axe and crampons. Special techniques are required for travel in the Scottish hills.</td>
</tr>
<tr>
<td></td>
<td>In the event of injury, carry out immediate first aid and evacuate the casualty or erect a shelter as appropriate. Signal your distress: other mountaineers may be nearby and able to assist, or telephone 999 and ask for Mountain Rescue assistance. The international Mountain Distress Signal is 6 rapid signals (by whistle, torch, shout etc) repeated at one-minute intervals until you are located.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Conserve wildlife</th>
<th>Try not to disturb domestic or wild animals, and leave flowers and plants for all to enjoy. Mountaineers have agreed closed seasons for certain crags and nature reserves.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Do not pollute mountain streams by dam building or dishwashing; local farms rely on these streams for a regular water supply.</td>
</tr>
</tbody>
</table>
14.6 The Country Code

An understanding of the spirit and content of the Country Code and practical observance of its terms is an important part of an outdoor expedition.

Enjoy the countryside and respect its life and work

The public is on trust in the countryside. Respect the property and the livelihood of those who live and work in the country. If the opportunity occurs, try to explain your purpose to local people and thank them for their co-operation. Permission to camp must always be obtained from the landowner or appropriate person.

Guard against all risk of fire

Permission must always be obtained before lighting an open fire. If a fire is used for cooking, or as a campfire, care must be taken to remove turf first. The fire should be extinguished carefully and allowed to cool before returfing. If a party discovers a fire out of control, it should be reported to the appropriate authorities.

Fasten all gates

A gate should be used properly and not climbed over. The last person in the group should carefully re-fasten the gate.

Keep to public paths across farmland

In the more cultivated areas of the countryside, footpaths must be followed carefully. In the mountains, efforts must be made to find the proper path from road to open hillside. On narrow paths, keep in single file.

Use of gates and stiles to cross fences, hedges and walls

There is seldom any excuse for crossing a wall or fence by any other way than by the stile or gate provided.

Leave livestock, crops and machinery alone

Take your litter home

All litter must be deposited in a wayside litter-bin or taken home. It should not be buried.

Help to keep all water clean

Many rural communities use stream water for domestic purposes. Do not contaminate any water source.

Protect wildlife, plants and trees

Remember that there should be little or no evidence that an expedition has passed through or camped in the area.

Take special care on country roads

These are usually narrow and winding and should be avoided wherever possible. If it is necessary to use them for short distances, keep to the right and walk in single file.

Make no unnecessary noise
15 Mountaineering, hill-walking and wild country

Introduction

Qualifications
To lead groups in ‘wild country’, leaders/instructors must hold one of the following:

(a) A Mountain Instructors Certificate;
(b) A Mountain Instructor Award;
(c) A European Mountain Leader Award;
(d) A Winter Mountain Leader Award;
(e) A Summer Mountain Leader Award;
(f) A Walking Group Leader Award if the terrain is limited to:
   • open, uncultivated, non-mountainous high or remote country known variously as upland, moor, bog, fell, hill or down
   • areas enclosed by well-defined geographical or man-made boundaries such as classified roads (areas that merge with mountain regions and do not have well defined boundaries are excluded)
   • areas of remoteness that are easily exited in a few hours, returning to a refuge or an accessible road
   • areas where movement on steep or rocky terrain is not required (in either a planned or unplanned situation)
   **NB:** The Head of Strategic Risk Management can add further clarification if necessary. In England, all areas outside of the Lake District would be suitable terrain. Much of South and Mid-Wales would also be suitable – with the exception of the higher mountain tops such as Pen y Fan or Cadair Idris.

(g) A county letter of recognition granted following a mountain leadership training course and a subsequent assessment by a person designated by the Local Education Authority.

**NB:** This award is historic and was introduced to cater for moorland activities. Now that the WGL scheme exists, there will be no new letters of recognition issued.

Regulations

15.1 General

- Leaders should be very familiar with the type of terrain and conditions to be found on their planned trip before taking groups into that environment.
- The value of progressive training in outdoor skills cannot be over-emphasised. The strength of the party will usually be that of its weakest member. Training programmes executed on terrain offering relatively few hazards can be vital, developing competence and initiative.
- It is important that early training in walking skills should include accurate judgement of pace.
- With progressive training some young people will be able to plan and carry out their own expeditions. To this end, even when expedition groups are accompanied by a leader/instructor, individuals should be given constant practice in the relevant skills of map reading, navigation and decision-making.
• The number of young people with one qualified leader will vary according to the weather conditions, the nature of the group and the route to be followed, but should be such that proper supervision can be maintained.

• Before departure from base, the leader should ensure that the following points have been observed:
  (i) A local weather forecast has been obtained.
  (ii) A route card has been prepared giving details of the route to be taken and alternative routes for bad weather or other emergency, the names of party members, the estimated time of arrival at their destination or return to base and any other relevant information. The route card should be left with a responsible person who would take action in the event of the party being overdue.
  (iii) The walk is within the capabilities of the group bearing in mind the possible weather conditions.
  (iv) No young person is carrying a load that exceeds one quarter of his /her body weight.
  (v) All walkers are wearing appropriate clothing and footwear and carrying suitable spare clothing and waterproofs.
  (vi) Sufficient maps, compasses, whistles, torches and spares are carried for the size of the group and nature of the activity.

• Leaders carry a first aid kit and emergency equipment and know how to use them.

• Leaders should ensure that:
  (i) the pace is reasonable for the slowest members of the party;
  (ii) no one becomes detached from the group;
  (iii) all are aware of the procedures to be followed in the event of an accident.

• If for any reason an emergency alternative route needs to be used, then base must be informed as soon as possible.

15.2 Summer walking

For summer, high-level walks involving wet/cold conditions and high wind, or where training is of a more intensive nature and is part of an expedition or of expedition training, the following guidelines should be observed:

• Members of the party should know the international distress signal, and what to do in an emergency.

• Members should carry between them:
  (i) first aid kit;
  (ii) polythene survival bag, bivvi-tent or tent;
  (iii) torch, spare battery and bulb;
  (iv) emergency rations.

• Members should carry individually:
  (i) appropriate spare clothing including socks;
  (ii) whistle;
  (iii) waterproof top and waterproof over-trousers;
  (iv) hat and gloves;
  (v) flask with warm drink or stove per two or three if camping.
• In mountainous or rocky areas, leaders should carry a rope and be competent in its use on steep ground. 30 metres of 9mm is recommended. ‘Walking ropes’ of less than this diameter are not acceptable.

• The carrying of a map and compass per individual is only valid if young people know how to use them and needs to be allied to the aims and objectives of the group. However, it is recommended that such equipment is carried along with a pencil and paper.

• The recommended maximum ratio is two leaders per 12 young people for these conditions. (A minimum of one qualified leader plus one competent assistant.)

15.3 Winter walking

Only staff qualified under Sections (a)-(d) above will normally be recognised as competent to lead in frozen winter conditions. The winter environment can be extremely hostile and only exceptionally experienced groups with very competent and well-qualified leaders should venture into challenging and remote areas. That said, winter walking and mountaineering can provide wonderful experiences. Conditions can vary but when there is snow and ice the following considerations must be taken into account:

• For leaders and party members, windproof and warm clothing must be of the highest standard.

• Each member of a party should carry and know how to use an ice axe. From the outset young people must be taught the basic method of arresting a fall. It is important, however, to remember that this does not guarantee safety.

• No young person should be taken on to frozen tops or steep snow slopes unless he/she has had extensive training and practice of relevant skills in controlled and safe situations: this will involve the use of crampons.

• Leaders should carry crampons and suitable belay devices.

• Every effort must be made to ensure that groups are down to safe ground before dusk.

• There should be two leaders with a maximum sized group of eight.

15.4 Unaccompanied expedition groups

• Unaccompanied expedition groups must not operate in wild or remote country when winter conditions prevail. These are most likely to be found between November and March in England and Wales but could exist in Scotland from September to May.

• The adult expedition organisers must ensure that the group is competent to undertake the proposed journey safely.

• The group should not be less than four persons.

• All must be fully aware of the route to be taken and have completed a route card. An adult supervisor must check that they have the correct clothing, equipment and safety devices.

• Each person should have a waterproofed printed card setting out clear details of accident procedure and know what to do in an emergency – e.g. getting lost, becoming benighted or straying off route.
16 Rock-climbing and abseiling

This section covers climbing and abseiling both on natural rock and on artificial climbing walls and towers. The following categories are used:

Artificial climbing walls and towers
Qualification  MIC or MIA
            SPA (Formerly called SPSA)
            SCC Letter of Recognition for SCC employees
            In-house assessment

Southern sandstone outcrops
Qualification  As above

Single pitch (either leading or top-roping)
Qualification  MIC or MIA
            SPA

Multi-pitch climbing
Qualification  MIC or MIA

It must be remembered that none of the Mountain Leader Awards are qualifications for rock-climbing. Equally a rock-climbing award on its own does not qualify a leader to operate in wild country.

It is also possible to gain a site-specific letter of recognition, i.e. for the climbing towers at High Ashurst and Thames Young Mariners OECs. Such awards allow the holder to supervise groups at one named site only and no other.

General

Holders of any of the awards named above will be familiar with current best practice and it is therefore not necessary to give detailed guidance. Teachers and youth workers employing rock-climbing instructors should be aware of the following points:

- A technical expert must make an in-house assessment. Normally this would be a holder of the MIC or MIA. The Head of Strategic Risk Management will further endorse SCC in-house assessments.

- As in most adventure activities, the rock-climbing experience should be progressive.

- Helmets must always be worn on natural rock but, in some circumstances, need not be used on artificial structures (this would normally only be on an indoor wall where there was no risk of anything being dropped on participants). The Head of Strategic Risk Management can advise.

- On educational visits organised by teachers and youth workers, there will be no lead climbing. Participants must either be top-roped or second a qualified lead climber.

- Teachers and youth workers should satisfy themselves that the level of challenge is appropriate to the group.
• The ratio of instructors to participants will vary according to the experience and abilities of both as well as additional factors to do with the nature of the climbing area. Therefore no fixed ratio is offered here. Qualified instructors will need to make this judgement based on the factors above.

• No attempt is made here to suggest or prescribe technical equipment (with the one exception below). The training and experience of a qualified instructor will enable him/her to select equipment that is appropriate for the particular climbing activity.

• Self-locking belay devices such as Gri-gris can be very useful but must be used correctly and according to the manufacturer's instructions. On no account must they be relied on to self-lock as there are situations where this has been shown not to happen. Good belaying technique must be used at all times as with other belay devices.
Ropes courses / challenge courses / assault courses

A major difficulty in this activity area is the huge diversity of provision. Some courses, generally referred to as low-rope or challenge courses, will be less than 0.5m off the ground and the safety back-up will probably be through ‘spotting’. Other courses will take place high above the ground and the safety measures may include ‘cow’s tails’ or bottom belaying. Some courses will be permanent and others will be portable. Some centres or providers, including army youth teams, will offer assault courses where there is a timed or competitive element. Because of this diversity it is virtually impossible to offer sufficiently rigorous guidance here. All leaders intending to use such activities should seek detailed information from providers and refer the matter to the Head of Strategic Risk Management.

Ropes courses and challenge courses, in common with many other outdoor adventure activities, can offer excellent opportunities to foster personal growth, trust and support, team-working, communication, etc. Run well, they are beneficial, challenging and educational experiences as well as a lot of fun. Run badly, they could damage people both physically and psychologically. Participants should leave a ropes course with an increased, not diminished, sense of self-esteem.

It is bad practice to go straight on to high elements. There should be a lead-in to this type of activity so that trust and rapport can be established before going on to elements that can be extremely daunting.

In most cases (unless there has been an exceptionally well-constructed progression over an extended period of time) the highest elements are not suitable for primary school aged groups.

‘Cow’s tail’ courses, where the individual is responsible for protecting him/herself (as distinct from being top-roped) should only be used when:

(a) groups have previously gained extensive experience of working together on roped elements;

(b) there is genuine benefit to be gained for participants from this activity;

(c) the party leader and instructor are satisfied that the participants are competent to move on to this most advanced part of a ropes course.

Party leaders are not expected to be experts but a ‘common-sense’ approach, when making a preliminary visit, is very valuable and the following questions and suggestions might help you:

- **What is the maximum height that participants will be off the ground?**
  On challenge courses, there should never be a fall height greater than 0.6m without an impact-absorbent surface. The nature of a challenge course is such that falls are likely and could be sudden and uncontrolled, so the maximum height should not exceed 1.0m. On higher elements (top-rope or cow’s tail), where the ropes course is diverse and varied in height and difficulty, there must be progression, working from the lower and easier to the higher and more difficult.

- **How will they be safeguarded?**
  ‘Spotting’ is only effective for low elements. It needs to be taught, practised and active. Poor spotting can be more dangerous than nothing at all in that it can give the illusion of protection where none actually exists. It is good practice to have an impact-absorbent surface – this **must** be present once a fall height exceeds 0.6m.
• **Should helmets be worn?**
  Helmets must be worn on high elements where there is a risk of a participant striking their head or being hit by something falling from above. It follows, therefore, that spectators in close proximity should also wear helmets. Careful consideration should be given to the wearing of helmets on low elements and challenge courses. Generally, there is a greater chance of participants striking their heads on these types of courses and so helmets should be worn.
  *(Note: on a small number of elements, wearing helmets could increase rather than reduce risk. Ask for clarification from the centre and, if in doubt, check with the Head of Strategic Risk Management.)*

• **What type of harness should be used?**
  On roped elements, a waist and chest harness or full-body harness must be used. A waist harness on its own is not acceptable as there is a high likelihood of participants inverting.

• **If a high element is used, how will a participant be returned safely to the ground?**
  Participants must be safeguarded whilst climbing up to the particular element, during it and whilst descending (either climbing down or being lowered).

• **What training and qualifications do the instructors hold?**
  There is no national governing body for ropes courses and, therefore, no national qualifications. Some companies that build ropes courses provide very good training; other providers have their own system of in-house training using a ‘technical expert’. In either case it is essential to know the name and competence of the technical expert. The Head of Strategic Risk Management can check this.

• **Is any element timed or competitive?**
  The philosophy in use should be one of co-operation and support rather than competition, therefore no element should be timed or competitive. Assault courses used by the armed forces should not be used in the conventional way. They may be suitable if used to promote team-working rather than individual assessment.

• **What is the educational value of the experience likely to be?**
  Trust, support and challenge are all good reasons for using ropes courses but they must be suitable to the age, needs and abilities of the participants. If a provider cannot give you lots of positive reasons for using a course, it would be wise not to use them. Teachers and youth workers should also be clear what the likely benefits of using a course are.

• **When was the course last inspected in terms of construction and maintenance standards?**
  An external contractor (often the manufacturer) should inspect the course at least annually. Additionally, they must be inspected regularly by the person in charge of the ropes course (senior instructor or similar) and before use by the instructor (every time they are used). Details of annual and periodic inspections should be logged and available for inspection.

• Feel confident about also checking things yourself. If ropes look worn, equipment looks neglected, trees look damaged, and planks have splinters, etc. – voice your concerns to the centre manager. Ultimately you may decide not to use the course.

• **Does the centre have a code of practice or operating procedures?**
  You should be able to see this on demand. If the centre does not have either of these (or something similar) you should not use it.
18 Orienteering

18.1 Qualifications
Teachers/youth workers and others taking groups of young people to organised orienteering events should be approved by their head of establishment and have first-hand experience of the sport. Leaders should be fully aware of the coaching award scheme and the safety recommendations of the British Orienteering Federation. Those adults wishing to develop the sport are advised to attend courses organised by the Federation.

Teachers introducing pupils to orienteering within the confines of the school grounds need not be qualified but are advised to seek advice from the British Orienteering Federation regarding suitable methods of introducing the sport.

18.2 Competitive orienteering
Competitive orienteering is one of the outdoor activities in which a young person may be entirely alone in the woodland or the countryside. Suitable safeguards must be made – these will vary depending on the age, experience and abilities of the participants.

18.3 Ratios
Young people should operate in twos or threes, especially in the introductory stages. In confined areas, ‘distant supervision’ is acceptable but leaders should satisfy themselves that the site is secure against intruders. Each participant should carry a whistle to be used if there is a problem. Teachers will need to work carefully with the group so that they understand their responsibilities and what to do in the event of an emergency.

18.4 Equipment and clothing

- Much basic orienteering takes place in open country. However, when running through dense or abrasive undergrowth, participants in orienteering events must have full leg and arm cover to minimise the risk of scratches and grazes that could lead to infection.
- Competitors’ clothing should give adequate protection against cold, wind and rain. This will to a large extent be governed by the time of year and location.
- Footwear that will grip on sloping or slippery surfaces should be worn.
- A polythene map-bag, whistle and compass are essential and it is sensible for beginners to carry a watch.

18.5 Participation

- Those in charge of parties at organised events should ensure that each competitor chooses a course that is appropriate to his/her age, fitness and previous experience.
- Leaders should ensure that beginners are aware of the scale and main symbols used on orienteering maps. It is particularly important to draw attention to areas marked ‘out of bounds’ and to the colour convention of the maps.
- Leaders should stress the importance of reporting to the finish and of handing in control cards. This requirement applies to all competitors whether they complete a course or retire.
• Absolute beginners should also be given clear instructions about what to do if they become lost. It might be helpful to suggest a compass direction that should be walked in such an event – e.g.: ‘Walk south until you reach the main road’.

• If someone is apparently lost at the conclusion of such an activity, the person in charge should first check that the young person is missing and, if so, search obvious features such as control points, paths or rides and boundaries. Other participants should not be used to help in the search. It is then a matter of judgement, depending on the time of day and prevailing weather conditions, as to when the police should be alerted. It is a useful safety strategy to set an outside time limit by which all participants must return to base.

18.6 Terrain

It is often feasible for activities to be based on a permanent orienteering course in the locality. Failing this, the event organiser should endeavour to use a small area with clearly defined boundaries and take care to ensure that obvious hazards such as quarries, crags, deep ponds or marshes, major roads and railway lines are clearly marked ‘out of bounds’ on the map and, if necessary, taped off. The planned duration and technical difficulty of the course should be well within the capabilities of the participants, and should involve safety strategies to limit the effects of navigational errors.
19 Horse-riding and pony-trekking

19.1 Qualifications

The minimum qualification for the teaching of horse-riding should be the Assistant Instructor's Certificate of the British Horse Society, the International Level 1 or a letter of recognition by the Authority of a person's competence on the strength of his/her past experience and training. Usually, these people should be supervised by someone holding a more senior qualification, such as:

- BHS Assistant Instructor or International Level 2, or
- BHS Instructor or International Level 3

19.2 Regulations

- Horse riding and pony-trekking should take place at a riding establishment that is either approved by the British Horse Society or is operated to the standards required for such an approval. (Many unrecognised centres do not provide suitable equipment or standards of instruction for young people.)
- Teachers/leaders should see that their pupils observe safety precautions that are drawn up by the riding establishment.
- All riders must wear a riding hat that is designed for the purpose, in good condition and conforms to one of the following three standards: PAS015, BFEN1384 or ASTNF1163.
- All riders must wear long trousers and footwear of a design that cannot slip through the stirrup.
- The riders: instructor ratio should be appropriate to the competence of the group.
- Preliminary riding instruction must be given before extensive pony-trekking is undertaken. Pupils must not be allowed to ride unsupervised. Inexperienced riders should not be taken on roads.
- Protective clothing, first aid kit and map should be carried for trekking in wild country.
- Before setting out on an expedition, preliminary riding instruction must be given. The leaders must know the area and details of the route to be taken must be left at the centre. The children must have sufficient food and an appropriate size of horse to ride. Adults must be briefed on safety procedures and communication, and the group must keep together. The weather conditions must be checked and ‘escape routes’ must be known in case of any emergency.

Further guidance is available from the British Horse Society: www.bhs.org.uk
20 Cycling (including mountain-biking)

20.1 General

Teachers/youth workers planning to supervise such an activity should be approved by their head of establishment.

Cycling is a popular activity for young people, but the increase in traffic even on minor roads means that vigilance is necessary. Every care must be taken by leaders to ensure that youngsters understand correct behaviour and are aware of likely dangers en route.

Before allowing young people on the roads, leaders must be sure that participants are proficient cyclists and know the Highway Code.

On quiet roads it may be safe to cycle two abreast, but if there is traffic on the road it will be necessary to proceed in single file.

If there are two leaders present, the best system of supervision is for one to be at the front of the party and the other at the rear.

Groups should be small; seven is a recommended maximum for one adult. If there are more participants, riding in two or more smaller groups a few minutes apart should be considered.

The pace of the group should always be comfortable for the slowest participant.

20.2 Clothing

All cyclists should wear an approved and correctly fitted cycle helmet. Consideration should be given to appropriate clothing and footwear, especially if the activity is taking place in wild country, when suitable foul-weather clothing and survival equipment should be carried.

20.3 Condition of bicycles

- Whether cycles are hired or belong to those taking part, they should be checked for roadworthiness and safety and be suitable to the size and weight of the participants.
- It is essential to check brakes, tyres and lights.

20.4 Touring

Sound planning and preparation is required for cycle touring. The British Cycling Federation and the Cyclists' Touring Club offer useful advice on such matters as choice of basic equipment, the loading and gearing of bikes, route-planning and daily schedules.

20.5 Mountain or off-road biking (also known as all-terrain biking)

It is essential that participants learn to use their bikes in a safe practice area where they can learn the specialist techniques of off-road biking. Inexperienced groups should not go on an off-road trek until the leader is satisfied that the participants have gained sufficient skill. Although many young people own mountain bikes, few ride them off-road and so do not have the skills necessary to deal with varied and unusual terrain and conditions.
The incidence of accidents leading to injury is relatively high, certainly much higher than other activities such as rock climbing which might be perceived as more hazardous. Mountain biking should only be led by those with sufficient experience to be aware of the hazards involved and to reduce the risk to an acceptable level.

Currently there are more than 25 organisations offering training. None of them could claim to be the recognised standard and so it is not possible to recommend any one body. A list of providers is available from the AALA website on www.aala.org.uk (search for off-road biking).

- Mountain and off-road biking, using specially designed and built cycles, is steadily increasing in popularity as a means of exploring the countryside. It is a physically demanding sport that requires similar stamina and safety techniques to those necessary for mountain- and hill walking (see section 15 if applicable).
- Group leaders should have a good knowledge of mountain bikes, navigational skills and an awareness of safety and group management appropriate to the nature of the group and the route proposed. They must be qualified if visiting mountainous country remote from immediate help.
- Groups should be small. Planned activities should be well within the capabilities of those taking part, and leaders need to ensure that any environmental damage and erosion are kept to a minimum.
- Groups cycling in open country should show the utmost consideration for other users of the countryside. They must only ride where they have approval or legal right.
- Leaders should carry suitable equipment to repair broken chains and mend a puncture and a basic toolkit to effect running repairs. A pump is essential, along with a spare inner tube. A first aid kit must be carried.
- Most accidents are the result of too much speed and too little ability. Inexperienced riders must be controlled and prevented from racing or riding too fast.
- Young people may not have sufficient strength or weight to control their bikes sufficiently on demanding terrain.
- Many participants do not realise how long, both in time and distance, it takes to stop on different surfaces.
21 Camping

A set of camp rules must be prepared, which must be discussed, understood and accepted by all campers. Particular attention must be paid to the disposal of waste.

Careful planning and organisation of the cooking and eating arrangements must be made. In lightweight camps particular care must be taken in bad weather. Under no circumstances should participants cook in their tents, including within the shelter of the door.

Assembly of liquid petroleum gas (LPG) appliances and the changing of cylinders should take place in the open air and away from any source of ignition.

People have been injured in their homes, caravans, tents and boats by accidental fires and explosions involving gas in cylinders used with heaters, cookers, lights and refrigerators. Accidents most frequently occur as a result of gas leaking when people are assembling appliances or changing cylinders or cartridges. Liquefied petroleum gas – LPG – is butane or propane, stored as a liquid under pressure. A small leak can produce a large volume of highly flammable gas. The gas is heavier than air, so it collects near the floor or ground and can be ignited at a considerable distance from the source of the leak. If the escaping gas is ignited in a room or other space there may be a fire and an explosion.

21.1 Guidelines for the use of camping stoves

Leaders in charge of Duke of Edinburgh or other trekking groups must have attended a relevant training course. For normal and open country this would be the Basic Expedition Leaders Award and for remote or wild country this would be the Mountain Leadership Award (Introductory Course or Assessment).

A written risk assessment must have been completed, which identifies the likely risks and the control measures that will be used. Specific reference must be made to the use of stoves.

Lightweight expedition stoves

The only types of stoves that are permitted are Trangia type meths stoves or gas stoves with low burner units and separate self-sealing gas canisters.

The risk assessment should consider all control measures, including the ratio of staff supervising students. As a guideline, an introductory session must be organised by a qualified member of staff. Adults, suitably briefed for a session, should supervise no more than four Trangias at any one time.

The specific circumstances for the use of the stoves might relate, for example, to the use of the stoves by Duke of Edinburgh students working without supervision. In this circumstance, the risk assessment must address how the young people have been trained in the use of the stoves and how their competence has been assessed and recorded in their D of E record book.

Briefing notes on the use of Trangias:

- The safe use of the stove should be demonstrated by a suitably qualified person (summer ML trained, BELA holder or supervisors having attended a refresher course).

The stove must only be used well away from tents – it is designed to work well in the wind.

Demonstrate the setting up of the stove, explaining all components.
Meths should be kept only in Trangia fuel bottles with a fail-safe fuel cut-off valve. SIGG bottles should no longer be used as they do not have a fail-safe cut-off valve. These bottles should be filled from larger containers kept in an appropriate (ideally cool) store before issue. **LARGE CONTAINERS SHOULD NEVER BE USED TO DIRECTLY FILL THE FUEL WELLS OF TRANGIA STOVES.**

When filling the stove great care should be taken not to spill fuel, as the ground can catch fire.

Do not remove the filler cap lid on the Trangia bottle to pour the meths, but use the spout correctly.

Do not fill the burner unit more than 2/3 full, or it will not work efficiently.

Always screw down the filler-closing nut on the fuel bottle immediately after filling.

Strike match away from you and light fuel.

In bright light it is difficult to see meths burning. To check that it has ignited, pass your hand carefully over the burner unit to detect any heat, or put a used match into the fuel well. If it burns, the stove is alight.

Demonstrate the use of the simmer-cap for flame regulation. Use a fork and a pan lifter if necessary. **DO NOT TOUCH** the simmer cap with fingers/hands when in use – it will be HOT.

To extinguish the burner unit, use the simmer-cap only, in the closed position. Do not use the burner lid to extinguish the stove – the rubber washer will become damaged.

If the burner unit needs refilling, **ALWAYS** ensure that the flame is extinguished before refilling – check as above (11) if in doubt. If the stove has gone out because the available fuel has been used, bare metal will be visible in the bottom of the fuel well. Leave the burner to cool for a couple of minutes.

To speed cooling, once the burner is out, add drops of water to the fuel well until the water no longer evaporates. Alternatively use a spare fuel well and swap the burners over, taking care when removing the exhausted burner – it will be HOT.

Always extinguish the burner unit when not in use as this is safer and conserves fuel.

Always extinguish the flame and leave the burner unit to cool before screwing on the burner unit cap. If this is put on when the unit is hot you may burn your hands, damage the rubber sealing washer and make the cap very difficult to use in the future.

Pack all metal utensils into a poly bag inside the pans/kettle when packing the stove away to avoid damage to the pans. Tighten the strap and put inside a poly bag if the pans are black and sooty.

The stove should be thoroughly cleaned and dried on return to base and utensils put into a new, clean poly bag. The stove should be stored in the open to allow air to circulate.
For gas burners:
- Make sure the regulator is fitted securely before turning gas on.
- Turn gas off when not in use.
- Make sure gas stoves are turned off from main regulator overnight.
- Puncture type canisters without an integral seal **must not** be used. Gas stoves should be left outside tents (not in the ‘fly’ area), to avoid the dangers of them leaking overnight.

Petrol and similar fuels
Although petrol stoves can be extremely efficient, they require competent and careful use. Petrol stoves may only be used by **very** experienced and mature campers. Remember that a petrol stove used wrongly is a potential bomb!

Fire Points
With standing camps it is advisable to prepare a ‘Fire Point’, if one is not already provided. A ‘Fire Point’ should include the following:
- A means of raising the alarm.
- Extinguishers, water buckets or beaters.
- Details of the full name and address of the camp-site, together with the map reference.
- The location of the nearest telephone.
- The rendezvous point to meet the fire brigade and direct them to the camp field.
22 Skiing

22.1 Introduction

The vast majority of school/youth group ski journeys are run well and for the right reasons. Sadly, the actions of a few irresponsible leaders and supervisors have sometimes given school/youth ski journeys a bad name. It must be clearly understood by all involved that this is not a free ski holiday. Supervisors are there to look after the young people and must act accordingly during the day and at night.

- To organise and lead a ski journey, the party leader must hold a Ski Course Organiser's (Part 1) Certificate and have previously accompanied an experienced leader on at least three ski journeys.
- All skiing activities, whether instruction or practice, must be supervised by an appropriately qualified teacher, youth worker or ski instructor.

22.2 Instruction and lessons (snow)

- To instruct group members to ski on snow, the minimum requirements are that the instructor is:
  (i) a member/employee of the local ski school, or
  (ii) a qualified member of the British Association of Ski Instructors (minimum Grade 3 Certificate holder), or
  (iii) a qualified coach of the English or Scottish Ski Councils.
- Groups must receive 2 x 2 hours of lessons daily, with a sufficient rest in between (i.e. lunch). For some children, two hours only might be considered to be sufficient.
- Unqualified ski guides, ski companions, etc. should not be used, and party leaders should be wary of companies and packages claiming to offer ‘total supervision’.
- The numbers of pupils with one qualified instructor must not exceed 12. (Where companies suggest ratios in excess of this, they should be referred to the County Guidelines and, if necessary, to the Head of Strategic Risk Management.)

22.3 Artificial slope skiing

- To instruct on an artificial slope, the minimum requirements are that the instructor holds any of the qualifications required for snow or holds either an Artificial Ski Slope Instructor’s Certificate or a Club Instructor’s Award (ASSI Part 1, plus an appropriate endorsement by the local ski club, ski school or ski slope).
- All skiers must wear gloves or mitts and appropriate clothing to protect legs and arms.

22.4 Supervision of skiing – general guidance

- There are times when it is helpful or desirable for a teacher or youth worker to supervise skiing. These would include offering further practice outside of lesson times, re-uniting an individual with the ski class, or offering additional help to an individual who is struggling.
  NB: This should only be done with the full agreement of the ski school and the instructor in charge.
- Teachers and youth workers should ensure that group members do not continue to ski when they are tired, as accidents are most likely to happen to a tired skier.
- No supervision should take place without the leaders first checking with the ski school that the party members are at the required standard and that the runs to be used are suitable. Particular attention should be given to changing conditions that might affect the difficulty of the runs.
22.5 Qualifications for supervising groups

- To supervise group members on nursery slopes, leaders must:
  - hold an artificial ski slope instructor’s award, an Alpine Ski Course Leader Certificate, or a SCC letter of recognition in respect of ability, training and past experience;
  - have attended a SCO1 course;
  - have accompanied ski parties on snow on at least three occasions;
  - possess at least the Two-Star Award of the British Alpine Ski Award Scheme or have proven skiing ability of that standard, or work directly to a qualified ski instructor.

- To supervise group members at Green and Blue run standard, leaders must:
  - hold either an Alpine Ski Course Leader Certificate or a SCC letter of recognition in respect of ability, training and past experience;
  - have attended a SCO1 course;
  - have accompanied ski parties on snow on at least four occasions;
  - possess at least the Three-Star qualification of the British Alpine Ski Award scheme or have proven skiing ability of that standard.

- To supervise group members at Red run standard, leaders must:
  - hold either an Alpine Ski Course Leader Certificate or a SCC letter of recognition in respect of ability, training and past experience;
  - have attended a SCO1 course;
  - have accompanied ski parties on snow on at least five occasions;
  - possess at least the Four-Star qualification of the British Alpine Ski Award.

- Black runs should not be used. Group members who can confidently ski at black run standard should consider joining a ski club that can offer courses and tuition appropriate to their ability.

- Applicants wishing to receive a county letter of recognition will be expected to know about:
  - mountain hazards – cold, wind, precipitation, visibility, sun, altitude, clothing and equipment.
  - the Ski Way Code
  - equipment
  - avalanche danger
  - weather – simple forecasting
  - basic first aid, including knowledge about fatigue, hypothermia (exhaustion exposure), anxiety and the uses of ski patrols
  - emergency procedures.

22.6 Regulations – snow skiing

- Except where there are not sufficiently able skiers among the staff, a member of staff must ski with each ski group during lesson times.

- Preparation for snow skiing is essential and should include a course of pre-ski exercises designed to strengthen the relevant muscle areas and, if possible, attendance at an artificial ski slope course of training.

- Initial instruction should include the safe carrying of skis and the handling of ski sticks.
• All young people must wear suitable clothing for skiing. This will normally include:
  – a windproof jacket
  – ski pants or salopettes
  – gloves or mitts
  – a hat
  – other clothing that will provide sufficient insulation against the effects of cold.

• Equipment:
  (i) Skis must have safety bindings and must be adjusted to suit the weight and
      physical condition of each skier. This must be done only by a competent
      technician at the hire shop.
  (ii) ’Ski stoppers’ must be fitted and checked to be working for all skiers.
  (iii) Skis should be of appropriate length.

• Skiers must not ski wearing sunglasses or goggles containing glass lenses.

• No pupil may ski unsupervised.

• Only groups accompanied by qualified ski instructors may ski off the piste. The
  advice of local experts must be sought in all matters concerning both on- and off-
  piste skiing.

  NB: You must also check that your school journey insurance policy covers this
  type of activity.

• It is the responsibility of the party leader to ensure that all members of his/her
  party are safely off the mountain well before dusk.

• Pupils must not practise at the foot of crowded slopes.

• The party leader remains responsible for the group at all times. He/she also has
  responsibility for safety outside lessons given by a qualified instructor. The party
  leader should monitor the lessons and liaise with the ski school as required.

• Only where there is planned and agreed time off-duty should supervisors ski for
  their own enjoyment. This can only happen if there remains a sufficient number
  of staff to provide appropriate supervision for the group.

22.7 Snowboarding and snowblading

Snow boarders and snowbladers must wear helmets.

All of the previous guidance applies, except for the sections on equipment referring
specifically to skis.

Party leaders should be aware that at many resorts dedicated snowboarding runs
may be available, and in certain places snowboards are not permitted on certain runs.

Skiers and snowboarders will take different lines down a piste and so it is not
recommended that skiers and snowboarders ski together.

Inevitably, snowboarders will need to sit down to adjust bindings, etc. This should be
done in a manner and place that do not obstruct other people.

22.8 Helmets

Helmets must be worn by all snowboarders and snowbladers and any children under
the age of eight.

From 1 January 2005 all skiers aged 14 and under must wear helmets when skiing
in Italy.

It would be difficult to justify some wearing helmets and not others, so the best advice
is that were the law requires some to wear helmets, all in the party should do so.

Currently, no other country requires this.
23 Caving and mine exploration

23.1 Caving

It must always be remembered that caving makes great physical and mental demands. Young people being introduced to this sport will have little or no idea of what it entails. Leaders introducing youngsters to caving should therefore choose a cave system of an appropriate level where retreat at any time will not be unduly difficult.

Details of systems to be used must be left with a knowledgeable adult who would know what to do in the case of an emergency.

A lifeline must always be used with novices where there is a danger of a fall and when ascending/descending pitches.

An assistant leader must accompany the group. This assistant should have sufficient skill to be able to safely evacuate the group from the cave in an emergency.

The basic personal equipment for each caver should include:

- warm, protective outer garments
- suitable footwear
- protective helmet with chin strap and lamp holder
- an efficient headlamp.

Group equipment should include:

- emergency rations
- first aid kit
- emergency lighting and spares
- means to keep a casualty warm.

The leader must obtain detailed local weather information and know how to interpret it if there is any possibility of a cave flooding or conditions becoming unreasonably difficult.

Leaders should hold one of the following:

(i) A Cave Instructors' Certificate

(ii) A Local Cave or Mine Leader Award (Level 1 is appropriate for caves without pitches; Level 2 for caves with pitches less than 18m)

23.2 Mine exploration

All the previous notes apply.

It must be recognised that mines can present additional problems due to neglect and deterioration. In general, groups should not visit abandoned mines where no maintenance work is undertaken.

Mines that are open to the public and managed for this purpose are completely acceptable and ‘tourist/educational trips’ with a guide do not require accompanying leaders to be qualified.

Where the cave or mines system involves contact with water, leaders should be familiar with the signs, symptoms and treatment of Weils Disease (Leptospirosis). Please see Water Safety – General.
24 Water Sports - General

24.1 Water Sports

The range and involvement of people in water based activities, both on and in the water continues to grow. Advances in technology have enabled existing activities to be modified and improved with new activities developed so that the scope for choice is considerable. It is important to note that the opportunities for schools to take part in water-based activities are not limited to those sports listed in this guidance; however the listed water sports are the most commonly undertaken and therefore require specific attention.

The Aim of the Guidance

It is recognised that safe and worthwhile activities are a result of experienced and properly qualified instructors. As such, this guidance does not issue exhaustive notes because the instructors running activities should already be well aware of the required operating procedures. However, the notes do identify key points such as, supervisory ratios and what qualifications an instructor should hold before running activities. There are also some notes on basic equipment standards.

For activity-qualified teachers running their own activities it serves as a useful reference guide to the standards of good practice required. For supervisors without activity qualifications who are accompanying students, it can be used as a benchmark by which the provider’s safety standards can be checked. This is important, as party supervisors will always retain responsibility for their young people.

The qualifications and terms used in this guidance have been made as clear as possible, however if an inexperienced reader is unsure how to check an aspect of an activity, they should ask the provider to explain how they meet the various requirements within this guidance. In most cases, common sense in combination with this guidance, will be enough to assess the providers suitability. If a party leader is left in any doubt they should contact the Head of Strategic Risk Management.

24.2 Water Safety Requirements

For any water sports session to go ahead, the activity leader shall ensure that:

- All water sports activities are supervised at all times by a person holding an appropriate and valid minimum Surrey LEA recognised qualification;
- All water sports activities remain within the recommended student : instructor ratios;
- All participants and instructors always wear a minimum of 50 Newtons personal buoyancy*. A water sports activity** can only go ahead if there are sufficient buoyancy aids in a range of sizes for all participants;
- Within each group there should be a qualified first aider with a personal first aid kit or access to one within 5 minutes;
- Before any water sports activity begins, the lead instructor assesses both the conditions and the student abilities using this information to decide the:
  - Nature of the session;
  - Length;
  - Location;
  - Ratios;
  - Groupings;
- Craft numbers;
- Clothing;
- Safety boats;
- Emergency procedures (including capsize drill) and signals of the session.

Each session should begin with a briefing of this information to instructors and students. Lead instructors must also take into account any student health issues and should make students aware of the risk of catching water borne diseases.

Every session has clear emergency procedures and signals that are understood by all students and instructors.

*All buoyancy aids should be inspected and logged regularly to ensure that they are in generally good condition. There is no requirement for flotation testing, but this is available from the manufacturers if desired. If there is serious doubt as to their effectiveness, they should be tested or discarded.

**The only exception to the wearing of buoyancy aids is organised swimming, angling and narrow boating, where different guidelines apply.

24.3 Telling Someone Ashore

The details of each session or trip must be left ashore with a responsible individual who is capable of taking emergency action if the need arises. In practice this means a person who can phone the emergency services and pass on the information below. This information must include details of:

- Where the activity is taking place;
- The total number of those on the water;
- The types and numbers of craft involved in the activity, including safety boats;
- When the group is due back;
- The person in charge on the water;
- How they can be contacted.

24.4 Land Based Facilities

Where possible it is preferable to have the following land based facilities available:

- Easy access at all times to a telephone, for use in emergencies. A mobile telephone is acceptable;
- Separate male and female changing rooms with sufficient accommodation for the average number of course members. All facilities provided must be hygienic, tidy and well maintained;
- Toilet facilities, with soap and water for washing hands, located within a reasonable walking distance;
- Separate male and female hot showers. These are particularly advisable where there is a danger of blue/green algae or Weil’s disease;
- Adequate dry areas ashore to give shelter in bad weather and to enable a comfortable environment for shore-based teaching. These areas should be appropriately furnished and equipped for this purpose.
24.5 WATER SAFETY ADVICE:

Day Trips
Activity sessions on the water will commonly last two or three hours and will be in easy reach of a land base equipped with the facilities listed above. However, sometimes it is desirable to go further afield and to undertake a day trip or expedition. Because participants will spend long periods in exposed conditions, extra considerations must be made:

- What is the weather likely to do throughout the whole length of the trip?
- Do you have the right clothing, boats and safety equipment to deal with the likely weather conditions?
- Do you have enough supplies of food, water, spare clothes, fuel??????
- Have you left a copy of your journey plan with an appropriate person ashore?
- Do you have a reliable communication link to base? Mobile phone/VHF radio;
- Extra care should be given to spotting students becoming to hot or too cold;
- Have suitable, alternative places of shelter/landing been identified in case of emergency?

General Guidelines:

- All activities must be properly planned and organised they cannot be impromptu;
- Where changes in the planned activity occur, the base contact must be informed;
- Take care of the environment in which your activity is taking place;
- Do not trespass; most riverbanks and beaches are privately owned;
- Know and obey the “Rules of the Road”;
- Give preference to other water users;
- Do not take part in activities at night;
- It is advisable to be in possession, at all times, of a Public Liability Insurance Policy;

NB: It is also important for all instructors to carry a sharp knife, for use in the case of emergency.

24.6 Safety Helmets
For any activity where the lead instructor considers safety helmets to be necessary, they must conform to the following:

“Safety helmets must have a hard strong outer shell, and provide protection close to the eyebrows and ears and well towards the neck at the back of the head. The helmet must incorporate a shock absorbing liner of suitable foam. It must fit the head well, and must not easily pull up and backwards, exposing the forehead.”
25 Dinghy Sailing and Windsurfing

Windsurfing, Sailing and Safety Boat requirements are all dealt with together as they are often used in conjunction with each other.

25.1 Qualifications And Ratios:

The ratios below cover almost all locations and conditions. If a provider suggests alternative ratios or qualifications than those below the party leader should contact the Head of Strategic Risk Management to discuss the situation.

The listed qualifications below identify who should be supervising the activity; it should be noted that the activity can actually be taught by less qualified instructors so long as the identified supervisor is running the overall session.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Led by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dinghy sailing</td>
<td>Royal Yachting Association (RYA) Instructor</td>
</tr>
<tr>
<td>Keelboat sailing</td>
<td>Keelboat Instructor</td>
</tr>
<tr>
<td></td>
<td>Yachtmaster Instructor</td>
</tr>
<tr>
<td>Windsurfing</td>
<td>RYA Level2 Windsurfing Instructor</td>
</tr>
</tbody>
</table>

Ratios for different courses and activities do alter. The student/ instructor ratios, for the basic skills courses are given in the table below. For information regarding more advanced courses readers can contact the Head of Strategic Risk Management or the RYA.

### Type of craft: Student : instructor ratio

<table>
<thead>
<tr>
<th>Description</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crewed dinghies</td>
<td>3:1 for beginners with instructor onboard</td>
</tr>
<tr>
<td></td>
<td>Maximum 9:1 but not more than 6 boats per instructor (e.g. 3 Wayfarers with 3 students in each, or 4 Picos with 2 students in each)</td>
</tr>
<tr>
<td>Single handed dinghies</td>
<td>6:1 (applies only whilst the boats are used as single-handers)</td>
</tr>
<tr>
<td>Keelboats</td>
<td>Keelboats with accommodation: 5:1 (instructor on board)</td>
</tr>
<tr>
<td></td>
<td>Dayboats/keelboats without accommodation: maximum 4 students per boat. 1 instructor must be responsible for no more than 9 students (e.g. 3 boats with 3 students in each)</td>
</tr>
<tr>
<td>Windsurfing</td>
<td>6:1 or 2:10 with Assistant Instructor</td>
</tr>
</tbody>
</table>

25.2 Students

1. All participants and instructors on dinghy sailing, wind surfing and personal watercraft courses must wear a minimum of 50 Newtons personal buoyancy. They must also be worn on keelboats. Sufficient buoyancy aids in a range of sizes must be available for all course members.

2. A helmet must be available to each inexperienced course member and put on when instructed to do so by the Instructor in charge.
25.3 Dinghy Checklist

If a reader is unsure about checking the following aspects of a sailing dinghy, they should ask the person responsible to show them around the craft, explaining how it meets the below requirements. In general the boat should look in a good state, even to the untrained eye.

- The boats should be in a sound, sea-worthy condition. Hulls should be well maintained in a good state of repair, with all fittings in good working order;
- Standing and running rigging should be well maintained and in a good state of repair. There should be no protruding strands in wire rigging and all shroud pins and split rings should be taped;
- Sails should be in serviceable condition;
- Sails used for beginner and seamanship courses should be capable of being reefed afloat;
- Trolleys should be in serviceable condition;
- The crewed dinghies should carry suitable equipment for the area in which they are operating, (e.g. buckets, paddles, anchors etc).

25.4 Windsurfing Checklist

- All boards must have an efficient non-slip surface and have a towing loop fitted. A mast safety leash should be fitted if there is provision for one, all board to rig connections must be secure;
- Boards must be in good condition. Particular attention should be paid to the mast base, fin box, overall hull condition and weight. All rigs must be in good condition. Sails should be of a suitable design for the course being taught, be of sound construction and free of tears. Booms should be a suitable length for the sail, have an efficient method of attachment to the mast (clamps preferred) and should be covered with a suitable maintained grip. Masts should be of a suitable length and material, water-tight, fitted with mast bungs and be well maintained;
- All ropes must be of a suitable diameter and material and should be in good condition. Uphaul ropes should be attached by the shockcord to the mastfoot;
- Boards and rigs should be stored safely and they should be easily accessible for students. Attention should be paid to ensure that students are supervised when lifting and carrying equipment;
- Basic simulators must be available for each instruction group. Simulators must be in a good state of repair, stable and low. The board should be representative of the type used afloat, have a good non-slip surface and be securely attached to the simulator;
- Funboard simulators are recommended for teaching harness work at level 2. It is mandatory for Level 3 and above for teaching planing techniques, stance, waterstarting and carve gybing. It must be safe to use and in good condition.
25.5 Safety Craft

1 Sufficient safety boats must be available to provide separate cover for all courses in progress at any one time. It is not acceptable to expect the instructors teaching a basic skills course to also provide safety cover for large groups on open water.

The following safety boat requirements must be complied with:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Safety boats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windsurfing</td>
<td>12 boards to 1 safety boat</td>
</tr>
</tbody>
</table>
| Dinghies (single handed or crewed) | Up to 6 dinghies – 1 safety boat  
6 to 15 dinghies – 2 safety boats  
more than 15 dinghies – 3 safety boats |
| Keelboats | Sole boats should be in radio or telephone contact with the shore. For a day cruise, boats without engines should be in contact with a suitable rescue boat. A buddy system can operate if one boat is capable of towing the other to safety under power |

2 The safety boats must be suitably manned and equipped for the type of activity being overseen, the operating area and prevailing conditions, taking into account the distance from the operating area to the shore base.

3 For centres operating at sea, the minimum level of equipment to be carried is:
   - Paddles or oars
   - Bucket or bailer
   - Bridle secured to towing eyes
   - Towline
   - Spare starting cord and minimal tool kit
   - Survival bag or thermal protective aid
   - Waterproof First aid kit containing (minimum) 2 large wound dressings, 2 medium - wound dressings and triangular bandages.
   - Bower anchor sufficient for safety boat and any towed craft
   - Chain and warp as appropriate to area
   - Distress flares – 2 orange smoke and 2 pinpoint red, or 2 day/night flares

4 All safety craft and engines must be in good condition, well-maintained and regularly serviced.

5 Safety boats with outboard engines must be fitted with effective kill-cords. The inspector may wish to check that these are functioning correctly.

6 Engines and fuel tanks must have an efficient and secure method of attachment to the boat.

7 The safety boat must be afloat and ready for immediate use during activities.
26 Canoeing and Kayaking

26.1 Ratios And Qualifications: British Canoe Union (BCU)

The following ratios cannot cover every circumstance a canoeing party might meet and should be treated as a guide only. It is down to the discretion of the Activity Leader to finally decide the supervisory needs for a particular session.

Inland Canoeing:

V. SHELTERED WATER
Level 1 Coach/Level 2 Trainee
1:8 / Open canoes paddled solo – 1:8

SHELTERED WATER
Level 2 Coach
1:8 / Open canoes paddled solo – 1:8

MODERATE INLAND WATER
For journeys the level 3 Coach should be supported by *competent paddlers, on a ratio of 1:6

ADVANCED INLAND WATER
For journeys, the coach might be supported by *competent paddlers, on a ratio of 1:4

In each case the maximum size of group for journeys should be 12 singles or 6 double boats (staff boats should be on a ratio of 1:6).

*A competent paddler is a canoeist under training or someone who is at home in the conditions likely to be encountered and well able to undertake rescues and assist as necessary.

Sea Kayaking:

SHELTERED TIDAL WATERS
1:8
Level 2 Coach

MODERATE SEA
“For journeying along a stretch of coastline or estuary in relatively close proximity to the shore, with easy landing, not involving tidal races or overfall, winds not above force 4, a level 3 Sea Coach should be incharge supported by *competent paddlers on a ratio of about 1:6 in accordance to the conditions and group ability.” --BCU

Level 3 Sea Coach

ADVANCED SEA
“For journeys, a level 3 Coach with 5 Star Sea or equivalent ability and experience should be supported by *competent paddlers on a ratio of about 1:4 in accordance with conditions and group ability.” --BCU

Level 4 Coach

Capsize Procedure

Capsize must be an early part of basic training. A land demonstration of the capsize recovery drill must be shown before a student goes afloat for the first time.

UNDER NO CIRCUMSTANCES should a novice paddler, wear a spray deck until they have been trained to remove it and escape whilst capsized. The student must properly demonstrate this skill before being allowed to use a spray deck.
26.2 Student Information

1 As a minimum, canoeists should be water confident, whilst wearing a buoyancy aid.

2 All participants and instructors on canoe or kayaking courses must wear a minimum of 50 Newtons personal buoyancy. Sufficient buoyancy aids in a range of sizes must be available for all course members.

3 Students must be clothed ready for the conditions they will find afloat. Thought must also be given to how this clothing will perform if a student capsizes and is wet through.

26.3 Kayak And Canoe Standards:

- Footrests should be substantial and should be designed to prevent the canoeist sliding forward on impact. They should be easily adjustable and should not rotate; to avoid trapping.
- Closed-cell foam buoyancy shall be securely fixed.
- Each canoe or kayak shall be fitted with positive buoyancy so placed that the boat, when full of water but with no canoeist inside, will float at an angle of not more than 3 degrees when a 6.5 kg lead weight is suspended from each end.
- Either end of the canoe or kayak shall be fitted with grab loops or toggles or handles.
- Both left and right-handed paddles must be available for all students.
- Spray decks must be used on moderate waters or above, including the sea. They should be easily removed in the event of capsize. Participants must be trained in the removal of spray decks and progressively become accustomed to their use.
27 Improvised Raft Building

It is impossible to lay down definitive operating procedures for improvised raft building, as the activity itself varies greatly from location to location. It is therefore essential that providers complete their own written risk assessment identifying how the activity can be run safely.

The aim of the activity should be to construct successful rafts that are genuinely capable of carrying the stated number of participants. It is not acceptable to expect the raft to break up as soon as it touches the water. Where there is any doubt regarding standards of safety, advice should be sought from the Head of Strategic Risk Management and Service Development.

27.1 Qualifications And Ratios

The following guidelines aim to give the reader an indication only, of the supervisory levels required. However it is crucial that Instructors are properly trained to run the activity in its particular location.

A ratio of 1 : 8 is recommended. Activity leaders should consider how best to manage the activity, perhaps operating with one instructor afloat and one ashore controlling events and acting as “Beach Master”. Each raft should not be over loaded nor should the maximum size of the group exceed 16 students.

1 Instructors should have experience of the activity and one or more of the following instructor qualifications:
   - RYA dinghy sailing and/or BCU canoe/kayak;
   - A lifesaving award would be relevant;
   - A Canoe Safety Test would be relevant;
   - Powerboat Level 2 or preferably higher, if powerboat used;
   - First Aid.

   Experience should include in house training, including emergency role-plays and rescue situations.

2 Appropriate safety measures should be ready for implementation in the event of the raft capsizing or any other emergency.

3 Instructors must carry knives to cut loose anyone who may have become entangled.

27.2 Raft Equipment and Construction

Sufficient instruction should be given to groups throughout the construction period to ensure rafts are successful; this applies to younger groups in particular. The following points should be considered:

1 Barrels:
   - Enough buoyancy for extended journeys if these are envisaged.
   - Plastic 50 gal drums are the norm.
   - Steel drums increase the risk of trapping and crush injuries and are not the preferred option.
   - Consideration should be given to original contents of barrels — is there a health or pollution risk?

2 Poles:
   - Compromise between strength to avoid breakage and lightness to reduce risk of injury from careless handling.
- Very heavy equipment brings issues under "Lifting and Handling".
- All poles and barrels should be checked for damage-causing sharp projections or splinters.
- Breakage of bamboo poles presents increased risk over wood.

3 Ties:
- Rope is recommended, with the relevant knots being taught by the instructor.
- Ropes and straps: It is useful to remind participants that it is the rope, which needs to be tight to the point of inflexibility, not the knot.
- Loose ends and loops on raft could trap students.

4 Paddles: Often neglected. Cut down oars and kayak paddles may be awkward and/or cause injury.

27.3 Students’ Personal Equipment
- Buoyancy aids must be worn at all times when working on or near the water;
- Helmets must be worn when launching or afloat;
- Clothing to be appropriate to the conditions and the distance from base;
- Students must wear foot protection. Preferably light and lace-up;
- Leg/arm/hand protection to protect against grazes; gloves may be useful whilst building.

27.4 Safety Boats
Powerboats can be both help and a hindrance in this activity. When running a rafting session consider the following questions:
- Do you need a safety boat?
- Do they need to be able to carry the whole group or can you shuttle the group to shore?
- What type of craft?
- How many?
- What kit would be sufficient and appropriate?

Also note that:
- Kayaks are only useful as transport for the instructor;
- Open canoes may be used but this should be considered very carefully as they can be capsized;
- Powerboats may present problems in shallow water and when approaching swimmers;
- The activity may only need a shouting platform;
- The powerboat may only need the ability to recover a single swimmer;
- The powerboat may need to carry the whole group in rough conditions.
28 Narrow Boating

28.1 Ratios And Qualifications

The activity leader should hold one of the following:

- A valid Inland Helmsman Award from the Royal Yachting Association
- A Certificate of Community Boat Management from the National Community Boat Association.
- A letter of recognition from Surrey LEA.

The maximum number of leaders to students is 1 : 5.

28.2 General Information

1 Advice and information about the use of canals, restrictions and closure for maintenance should be sought from the nearest office of the British Waterways Board. Before selecting a boat, company or a route and either self-catering or not, it is advisable to send for details from companies who can provide, or who cater, for school/youth groups. The instructions given by such companies should be followed and appropriate pre-cruise meetings arranged.

2 The following information and guidance may be helpful to those planning such an activity for young people:

- **Locks** - These require special boat handling skills if dangers are to be kept to a minimum. At all times one member of staff should be at the helm, observing and directing all operations. The other member of staff should be on deck and, when going through a lock, on shore with those pupils operating the lock.

- **Cruising** - One member of staff should always be on deck, and all other pupils that are on deck should be visible to him/her at all times.

- **Mooring** - Staff should be on deck, one at the helm and one in the bow. When moored, if any pupils are up on deck, there should be a member of staff in such a position as to observe the whole boat.

- **Clothing** - Waterproofs are essential, as are quantities of warm clothing, no matter what time of year is being considered.

- **Games** - Alternative activities should be available inboard.

- **Routine** - regular mealtimes are important. Dividing the crew into two teams, permits a share of below deck activities, cooking and cleaning, and above deck activities like lock operations and navigation.

- **Sleeping** - Once in bed with lights out, each person should know the location of toilets, lights and staff and have a personal torch.

- **Hygiene** - Owing to the close proximity of living conditions it is essential to stress the importance of personal hygiene.
28.3 Safety

1 When on deck, (but not below), everybody, staff included, MUST wear buoyancy aids.

2 Attention is drawn to the vulnerability of any limb or part of the body that is likely to come between the vessel and a stone wall, another vessel or even an earth bank, as serious injury could occur.

3 Care should be observed when stepping ashore.

4 An appropriate “Man Overboard” drill should be known by all and followed immediately in the event of someone falling into the water.

5 When cruising canals, ideally no-one is ashore, other than to operate locks and/or bridges. Going ashore, should be an organised group activity, closely supervised.
Rowing and Boating

Rowing in all its forms is a strenuous activity and those who engage in it should be thoroughly prepared physically. Party leaders who regularly run these activities are encouraged to gain the Coaching Assistant Award from the Amateur Rowing Association. However many activity centres undertake their own training for those leading these activities and where such training exists a Coaching Assistant award is unnecessary. Attention to the following points will help to ensure the activity is undertaken safely:

1. The age and physical condition of participants are important factors and young people should not engage in activities and use craft for which they are not properly prepared.

2. Buoyancy aids must be worn at all times.
   
   [NB: Where groups are experienced, properly supervised and following a race training programme or similar, this need not apply.]

3. The leader concerned is responsible for ensuring the conditions for rowing are appropriate, the equipment is suitable and a named person is put in charge of the boat.

4. Before being allowed on the water participants should be briefed on:
   - Local navigation rules and the effects of currents, weirs, sluices and winds;
   - The rights and customs of other water users;
   - Emergency procedures in the event of a capsize or other accidents while rowing.

5. Providers should draw up safety guidelines for the use of their facilities by teachers or leaders.
30 Angling

30.1 Bank Fishing – Rivers and Lakes

Leaders should be active and proficient in the activity. It is desirable that they are members of a recognised angling club or association and have practical experience on the waters in which angling will take place. On deep water (at the margins) or on faster flowing waters, they should also hold appropriate lifesaving and first aid qualifications.

1 A staff to pupil ratio of 1:10 with a minimum of two responsible adults;
2 Participants will be made aware of any potential hazards, such as crumbling banks, current, speed of water, obstructions in the water etc.
3 There should be no wading.
4 A rescue line should be available.

30.2 Fishing From Boats

Any craft used should be adequate for the activity and large enough for the numbers taking part. If hired, the boat should conform to requirements laid down by the Department for Transport, local authority or other marine safety organisation.

Participants should be:

1 Knowledgeable of the local waters, tides and weather conditions;
2 Proficient in boat handling, rowing and the operation of engines, or engage the services of a professional boatman;
3 Wearing buoyancy aids at all times.

And in addition at sea:

4 The services of an experienced and competent skipper must be used.
5 Wear bright coloured windproof and waterproof clothing and carry spare warm sweaters (in a waterproof bag);
6 Take food, drink and emergency rations;
7 Be satisfied that the boat is equipped with spare and emergency equipment, including two-way radio communication if fishing some distance from the shore;
8 Take steps to prevent seasickness if this is anticipated.
31 Swimming in Open Water

Swimming in the sea, lakes or rivers is a potentially hazardous and life-threatening activity, which requires very careful assessment and must always be adequately supervised. A maximum ratio of 1:5 is recommended for this activity, with groups in the water not being larger than 15. If groups exceed this size they must be separated and treated as two different groups.

1 When swimmers are in a depth of water exceeding one metre, a person holding a valid and relevant Lifesaving Award must be in charge.

2 Swimming MUST always be a pre-planned activity it should never be spontaneous.

3 Local knowledge and information provided on markers and signs should always be looked for and respected.

4 Only waters free of pollution and locally recognised as being suitable for swimming should be used. Strong and dangerous tidal underflows are often present in attractive shore locations.

5 Parental approval for swimming should be obtained.

6 Swimming areas should be clearly defined/ marked and participants briefed and frequently reminded of these limits.

7 Swimming time in cold water should be limited.

8 Weaker swimmers must always keep to areas where they can stand.

9 Diving should not be allowed. Rescue lines should be available;

10 Regular counting of swimmers should be made. It is important to ensure that in a public swimming area the correct swimmers are identified; otherwise members of the public may be included in the count and party members might then be missed.

**NB:** Some providers offer Adventure Swimming as an activity. Essentially this encompasses a wide range of activities from swimming in moving water to jumping into water from low-bridges; in all cases however, buoyancy aids must be always be worn, with other protective gear as required. These are legitimate activities when properly risk assessed and well managed but should only be run by qualified instructors from centres holding an AALA licence for this activity.

Guidelines for Educational Visits and Outdoor Activities
32 Gorge Walking

Although this can be an exciting and rewarding activity, it can also pose a considerable degree of risk. Therefore, this activity should normally only be undertaken using an outdoor centre licensed to run this activity. If a leader from Surrey LEA wishes to run this activity without using an appropriate centre, s/he must contact the Head of Strategic Risk Management.

32.1 Qualifications and Ratios

The required qualification depends on the type of gorge being walked. Whatever the gorge the instructor must have prior training and experience with that particular gorge. There are three types, each listed below with their qualification requirements:

1  Simple Gorge -- Where the group can travel without using a rope and are involved in scrambling activities.
   Summer ML and Emergency Rescue*

2  Intermediate Gorge -- Where the group may have to wait as each member is roped, though it is still easy to regroup.
   Summer ML, SPA and Emergency Rescue*

3  Advanced Gorge -- Where MIA rope techniques / skills are necessary for the group to travel e.g.: Tyrolean traverses, traverse lines.
   MIA Award*

*In some cases, where the situation of the gorge does not require a mountainwalking qualification for access, a caving qualification might be an appropriate alternative to those given above.

The maximum group size is 12 students to 1 qualified instructor accompanied by a second responsible person. Smaller groups are recommended when gorges include pitches, which are best attempted by students being roped up or down individually.

For certain gorges, instructors may hold alternative qualifications to those listed above, however the provider must then show how their risk assessment allows for this.

32.2 General Information

Leaders need to be particularly aware of:

- Slips or falls, especially on wet rock – associated bruising, fractures and head injuries.
- Giving regular briefings.
- Cold following immersion, leading to loss of coordination, tiredness or hypothermia.
- Foot entrapment – difficult to release casually, may cause sprains or bruising.
- Drowning due to entrapment.
- Flooding
- Kit failure.
32.3 Equipment

- Strong Footwear
- Consider wearing steamer wet suits, for warmth and protection.
- Spare food and water
- Wear buoyancy aids/ impact jackets, at all times.
- Rescue aids

It is important that the activity is tailored to the needs of the group, bearing in mind fitness and aims of the group and the weather forecast.
33 Sub-Aqua and Snorkelling

33.1 Qualifications

- Pool Snorkelling: Snorkel Instructor/ Divemaster
- Advanced Snorkelling: Advanced Snorkel Instructor (Open Water)
- Aqua Lung training in a pool: BSAC Club Instructor/ PADI Assistant Instructor
- Open water Diving: BSAC Advanced Instructor/ PADI Open Water Scuba Instructor

33.2 Ratios

- one instructor to a snorkelling class of up to ten students;
- one instructor to four students for snorkelling in open water;
- one instructor to four students for Aqua-Lung training;
- one instructor to two students for Aqua-Lung diving in open water.

33.3 General Information

The leader/instructor should be satisfied that adequate provision for emergencies has been made prior to pool training sessions and open water dives. All equipment should be of a good reputable standard. A safety diver or boat cover should always be available on open water dives.

All divers should wear suitable life jackets (CO2 or air inflated) and each Aqua-Lung group should use a surface marker buoy. All participants should know the techniques of rescue and expired air resuscitation by the time they embark on open water dives.

33.4 Key Safety Points:

- All who take part in snorkelling must be able to swim 100 metres. The British Sub Aqua standard of proficiency test should be taken before participation in Aqua-Lung diving;
- The leader/instructor should be satisfied that pupils are fit to take part in each event. No member of the group who has a cold, infection, or who is suffering from severe fatigue, should be allowed to take part;
- Divers, whether snorkelling or Aqua-Lung diving, should work in pairs when in open water. Diving without a partner should be allowed only when a life-line is used and when an experienced standby diver is available;
- It is essential that all members of an open water diving party are familiar with rescue and emergency procedures;
- When diving in UK waters, adequate protective clothing should be worn;
- The British Sub Aqua Club Code of Conduct should be observed;
- The driver of any boat used should be suitably qualified and experienced.
APPENDICES
Surrey County Council

Application for approval for educational visit

This form should be completed for all educational visits requiring the prior approval of the Governors – i.e. for all journeys involving absence from home for one night or more and day journeys involving travel by air or sea or involving any hazardous pursuit or location, both in term-time or during holidays.

Section A

Name of school or youth group __________________________________________

1 Place(s) the group proposes to visit ____________________________________

2 Mode of transport ________________  Reg. no. (if known) _______________

3 Minibus permit number (if applicable) _________________________________

4 If minibuses are to be driven by school/youth group staff, please enter their names

________________________________________________________________
________________________________________________________________
________________________________________________________________

5 Have their driving licences been checked for driving a minibus? YES/NO

6 Name/address/telephone number _______________________________________

of accommodation to be used (attach a list of addresses if necessary) __________

7 Is appropriate insurance being arranged? ______________________________

8 Name of organising agency used (if applicable) _________________________

Member of ABTA YES/NO

If no, give details of bonding arrangements ______________________________

9 In the case of a journey overseas, is a collective passport authorisation required? YES/NO

10 Are visas or visa exemption required? YES/NO
Section B

1 Dates of journey: Leaving ______________ Returning ________________

2 Size and composition of party (at this early stage numbers may be approximate):
   Please mark name of leader with an asterisk

   (a) Young people

<table>
<thead>
<tr>
<th>Age</th>
<th>Boys</th>
<th>Girls</th>
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<td><strong>Total</strong></td>
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</table>

   (b) Teachers or qualified youth workers

<table>
<thead>
<tr>
<th>Mr/Mrs Miss/Ms</th>
<th>Name of teacher</th>
<th>Subject Specialism</th>
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   (c) Other adults

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<th>Mr/Mrs Miss/Ms</th>
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3 Home address of party leader ________________________________________________
   ________________________________________________
   Tel: _________________________

4 Name, address and telephone number(s) of home-based contact person
   (routine matters): ________________________________________________
   ________________________________________________
   Tel: _________________________

5 Name, address and telephone number(s) of duty officer
   (serious incidents or emergencies): ____________________________________________
   __________________________________________
   Tel: _________________________
Section C

1 Please attach details of the educational content of the journey and its relationship to the course of work being followed by those taking part.

2 Are any special risks involved? If yes, please complete all parts of this section.
   (a) Give details of any hazardous activities – e.g. hill-walking, mountaineering, rock-climbing, caving, swimming, sailing, canoeing, skiing.

   (b) Are there potentially hazardous locations – e.g. quarries, mines, beaches near cliffs, cliff walks?

   (c) State relevant qualification and experience of party leader. Name: ____________________________

       Qualification/experience: ____________________________

   (d) Attach itinerary and outline of the daily programme.

   (e) Attach risk assessments.

   (f) If an activity centre is being used, please enter AALA licence number or send Appendix B to the centre.

3 Duke of Edinburgh’s Award only

   Wild country panel notified * YES/NO

   Dates of journey: Leaving ______________  Return ______________

   Assembling @ ____________ Map ref ____________  Tim ____________

   Camping @ ____________ Map ref ____________

   Camping @ ____________ Map ref ____________

   Camping @ ____________ Map ref ____________

   Finishing @ ____________ Map ref ____________  Tim ____________

D of E expeditions/explorations

   BRONZE / SILVER / GOLD*  PRACTICE / TEXT*

   ON FOOT / ON WATER / CYCLING / HORSEBACK*

   EXPEDITION / EXPLORATION / OTHER ADVENTUROUS PROJECT*

   *please delete as necessary

I confirm that each participant has completed the required training.

Signed ____________________________________  Date ______________

Guidelines for Educational Visits and Outdoor Activities

3
Section D

Declaration of party leader:
I have read the relevant sections of the LEA’s Guidelines for Educational Visits and Outdoor Education Activities and agree to conform with the requirements therein. I attach completed risk assessments.

Signed ___________________________ Party Leader Date ________________
Name _____________________________

Declaration of Educational Visits Co-ordinator
I have advised the party leader and I am satisfied that the journey conforms to the Guidelines for Educational Visits and Outdoor Education Activities.

Name ____________________________ EVC Date ________________
Signed ____________________________

To the Chairman of Governors.
I hereby request the approval of the governors to this educational visit. I have satisfied myself that it conforms to advice contained within the LEA’s Guideline for Educational Visits and Outdoor Education Activities. I attach a copy of the relevant itinerary.

Signed: ______________________________ Date ________________
(Headteacher)

To the Headteacher.
Having been provided with sufficient information, I approve this journey, on behalf of the Governors.

Signed: ______________________________ Date ________________
(Chairman)

Head of Strategic Risk Management
Signed: ______________________________ Date ________________
(for Director of Education)

Notes:
Surrey Youth Development Service Application for Approval of an Educational Visit & Duke of Edinburgh’s Award Ventures (Bronze, Silver & Gold Levels)

(For office use only – Date Received …………………… Reference No ……………………)

The Process

1. It is important that approval for the visit (Part 1) is obtained before any financial or other commitments are entered into.

2. Where hazardous activities or high risk environments are involved, approval must be sought AT LEAST ONE MONTH before the proposed activity.

3. This form must be sent to the Youth Service Curriculum Development Unit Office AT LEAST ONE MONTH before the proposed activity.

4. A complete list of those participating in the visit, with contact names, telephone numbers and addresses must be sent to the YSCDU, 7 days before the proposed activity.

5. The original form is returned to the Party Leader who should distribute a copy to the nominated Home Based Contact.

6. This form EX4 should be completed by all groups directly accountable to Surrey County Council Youth Development Service for Educational Visits & Duke of Edinburgh’s Award Ventures (all levels), involving all day journeys, those which include travel by land, sea or air, absence from home for one night or more, or any hazardous pursuit and/or location.

Guidelines for Educational Visits and Outdoor Activities
Appendix A2

Surrey Youth Development Service Application for an Educational Visit or D of E Expedition (All Levels)

SECTION A Part 1

1 Name of Youth Centre/Club
   Project/Award Unit ...........................................................................................................................

2 Name of Party Leader ...........................................................................................................................

3 Has the Party Leader successfully completed the Residential Training Course run by Surrey Youth Development Service/or Duke of Edinburgh’s Award Surrey Induction Training?
   Yes ☐ No ☐ If No, when will this be completed .................................................................

Evidence of Need

4 Please give details of the identified need that this trip/visit is addressing
   ........................................................................................................................................................
   ........................................................................................................................................................
   ........................................................................................................................................................
   ........................................................................................................................................................

5 Please give details of how this need is identified
   ........................................................................................................................................................
   ........................................................................................................................................................
   ........................................................................................................................................................
   ........................................................................................................................................................

6 What Risk Assessments have been completed? ..................................................................................
   Have you attached copies? Yes ☐ No ☐

7 Please give details of the proposed activity
   Are you proposing to contract with a third party, if so who? ..........................................................
   What is the nature of the activity? (List all activities)
   ........................................................................................................................................................
   ........................................................................................................................................................
   ........................................................................................................................................................
   ........................................................................................................................................................
   Where is the activity taking place? (Full Address & Telephone Number; List all Venues)
   ........................................................................................................................................................
   ........................................................................................................................................................

When is this activity taking place?
   Date of Departure .............................................. Return Date ..................................................
   Total No of Days .................................................. (inclusive of travel)

Who is this activity intended for?
   ........................................................................................................................................................
   ........................................................................................................................................................
   ........................................................................................................................................................
   No of Male Participants ................................. No of Female Participants ..........................
   No of Male Leaders ................................. No of Female Leaders ..........................

If an Activity Centre is being used, please use Appendix B of the Surrey Educational Services Guidelines for Educational Visits and Outdoor Education Activities.

Which Service/Borough target does this activity address?
   ........................................................................................................................................................
   ........................................................................................................................................................
Resources

8 Please give details of the costs of the proposed activity: Are these costs Estimated or Actual? (please tick)

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<thead>
<tr>
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<th>Estimated</th>
<th>Actual</th>
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<tr>
<td>Cost of Venue</td>
<td>£</td>
<td></td>
</tr>
<tr>
<td>Cost of Staffing</td>
<td>£</td>
<td></td>
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<tr>
<td>Cost of Transport</td>
<td>£</td>
<td></td>
</tr>
<tr>
<td>Cost of Resources</td>
<td>£</td>
<td></td>
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<tr>
<td>Cost of Planning &amp; Evaluation</td>
<td>£</td>
<td></td>
</tr>
<tr>
<td>Any other costs (please give details)</td>
<td>£</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL COST</strong></td>
<td>£</td>
<td></td>
</tr>
</tbody>
</table>

9 Please give details of how this activity will be funded (including amounts):
........................................................................................................................................
........................................................................................................................................

Outcomes

10 Please give details of the anticipated outcomes of this activity:
........................................................................................................................................
........................................................................................................................................
........................................................................................................................................

11 How will you evidence the outcomes of this activity?
........................................................................................................................................
........................................................................................................................................
........................................................................................................................................
........................................................................................................................................

12 Please give details of how, and by whom, this activity will be evaluated?
........................................................................................................................................
........................................................................................................................................
........................................................................................................................................
........................................................................................................................................
........................................................................................................................................

I confirm that this proposed activity has been discussed with me and that I am willing to support it:

Signed: .................................................................................................................................
(Youth Development Service Area Manager/Head of Youth Service Curriculum Development Unit)

Date .................................................................................................................................

Contact No Work .................................................................

Mobile .................................................................................................
Part 2

A

1 What mode of transport is to be used?

☐ Car/s Registration No/s .................................................................

☐ Minibus/es Registration No/s ..........................................................
  (Note 1/Note 2)

☐ Coach Name of Company ............................................................

☐ Train

☐ Aeroplane Name of company ........................................................

Note 1: What are the names of the Drivers? Have the drivers been checked for driving a minibus?

1 ................................................................. Yes ☐ No ☐

2 ................................................................. Yes ☐ No ☐

3 ................................................................. Yes ☐ No ☐

Note 2: What are the minibus permit numbers? .................................................................

........................................................................................................................

2 Is appropriate insurance being arranged? Yes ☐ No ☐

B

Member of ABTA? Yes ☐ No ☐

If no give details of bonding arrangements .................................................................

3 In the case of a journey overseas, are there appropriate passport arrangements? Yes ☐ No ☐

3(a) Is a Visa required? Yes ☐ No ☐

4 Name, Address & Telephone No. of Home Based contact

...........................................................................................................................

...........................................................................................................................

5 Are any special risks involved? If yes, please complete all parts of this section.

(a) Give details of any hazardous activities eg hill walking, mountaineering, rock climbing, caving, swimming, sailing, canoeing, ski-ing

.............................................................................................................................

.............................................................................................................................

(b) Are there potentially hazardous locations eg quarries, mines, beaches near cliffs, cliff walks?

.............................................................................................................................

.............................................................................................................................

(c) State relevant qualification of Party Leader, or Leader(s) of hazardous Activity (if different)

.............................................................................................................................

.............................................................................................................................
Appendix A2

Names, Addresses & Telephone Nos of other staff

Qualifications
(appropriate to the activities)

.................................................................

.................................................................

.................................................................

.................................................................

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.................................................................

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.................................................................

.................................................................

(d) Attach an itinerary and outline of the daily programme.

6 SECTION B -
FOR DUKE OF EDINBURGH’S AWARD EXPEDITIONS ONLY

BRONZE/SILVER/GOLD

TRAINING/PRACTICE/ASSESSMENT*

ON FOOT/ON WATER/CYCLING/HORSEBACK*

EXPEDITION/EXPLORATION* (*Delete as applicable)

Assembling @. ........................................ Map Ref ____________ Time ____________

Camping @ ........................................ Map Ref ____________

Camping @ ........................................ Map Ref ____________

Camping @ ........................................ Map Ref ____________

Finishing @ ....................................... Map Ref ____________ Time ____________

NB – FOR GOLD EXPEDITIONS ONLY

Please ensure that either form (a) Expedition Notification For Ventures in Wild Country OR (b) Expedition Notification For Ventures Abroad is completed and dealt with in accordance with the instructions outlined on the appropriate form. It is also important that the route tracings and maps are attached to the application for approval.

Form (a) or (b) attached Yes ☐ No ☐ Route tracings & maps attached Yes ☐ No ☐

I confirm that each participant has completed the required expedition training.

Signed: ...........................................................................................................

Please print name ............................................................................................... 

Designation: .................................................................................................
SECTION C

Declaration of Party Leader

I have read the relevant sections of the LEA’s Guidelines for Educational Visits & Outdoor Activities and agree to conform with the requirements therein.

Signed: .....................................................................................................

Please print name .....................................................................................................

Date: .....................................................................................................

SECTION D

Declaration of Youth Development Service Area Manager/Head of Youth Service Curriculum Development Unit

On behalf of Surrey County Council Youth Development Service, I approve this journey. This approval is given on the understanding that written parental consent is obtained, and appropriate insurance in respect of any special risk, is effected in accordance with any advice given by the County Executive Director for Performance & Resources.

Signed: .....................................................................................................

(Youth Development Service Area Manager/Head of Youth Service Curriculum Development Unit)

Please print name .....................................................................................................

Date: .....................................................................................................

SECTION E

Approval of Head of Strategic Risk Management & Service Development

Signed ........................................................... Date ........................................

(Alan Cottle – Head of Strategic Risk Management & Service Development) OR

County Advisory Officer for Youth Work (Non-High Risk Environments)

Signed ........................................................... Date ........................................

(Paul Bowen – County Advisory Officer for Youth Work (Non-High Risk Environments))

SECTION F

Name, Address & Telephone Number of Duty Officer

.......................................................................................................................... ...................................

.......................................................................................................................... ...................................

.......................................................................................................................... ...................................

Tel: .....................................................................................................

SCC/YDSForm EX4

Guidelines for Educational Visits and Outdoor Activities
THE EDUCATIONAL USE OF COMMERCIAL, CHARITABLE AND PRIVATE FACILITIES

It is not feasible for Surrey LEA to approve each centre or tour operator which is likely to be used by its schools or youth groups on a regular and systematic basis. Therefore the following questions are directed at providers. Please give careful consideration to the statements below and sign in the appropriate space that the standard of service that you will provide to the establishment named below, will meet the conditions listed. Please indicate either by deleting the statement or through an explanatory letter any statements which do not apply to your provision. Space is also provided for you to detail any Centre registration or approval scheme for which you hold current accreditation. Certificates and documentation should be available for inspection on request.

To be completed by the Party Leader of the school or youth group:

SCHOOL/ESTABLISHMENT: ___________________________________________
ADDRESS & TELEPHONE NO: _________________________________________
___________________________________________________________________
___________________________________________________________________
PARTY LEADER: ____________________________________________________
DATE OF PROPOSED VISIT: ___________________________________________
NUMBERS OF YOUNG PEOPLE:  MALE: _____________  FEMALE: _______
AGE RANGE: ________________________________________________________
NAME OF OUTDOOR CENTRE: _______________________________________

To be completed by the Provider

STAFFING:

If you hold an AALA Licence:
Licence number: ___________________________   Expiry Date: ___________
Activities covered by the licence:
___________________________________________________________________
___________________________________________________________________
___________________________________________________________________

Activities not covered by the licence:
___________________________________________________________________
___________________________________________________________________
___________________________________________________________________

Licence Holders should ignore the following section and move on to section 6. Activity Providers who do not hold a licence should respond to all sections.
1 Please list the outdoor activities you will be providing along with the minimum qualification or training each instructor will have. Where appropriate, please also give details of the nature of the location used, ie

<table>
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<tr>
<th>Activity</th>
<th>Min. Qualification/Training</th>
<th>Location</th>
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<tbody>
<tr>
<td>Canoeing</td>
<td>BCU L2 Coach</td>
<td>Canal</td>
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2 Where there is no appropriate National Governing Body or appropriate award for a particular activity a copy of the providers published Code of Practice, including training and assessment procedures and risk assessments is available.

3 The ratios of staff to young people for the activities conform to those recommended by the appropriate National Governing Body, or, in the absence of this, the Provider’s Code of Practice.

4 The staff have the experience, competence and professionalism to work with the age range and abilities of the group.

5 Persons involved in the administration of first aid hold relevant current qualifications.

EQUIPMENT AND RESOURCES

6 The premises are covered by a current fire certificate or recent advice of the local Fire Authority has been sought and their recommendations adopted in full.

7 All equipment and resource provision are suited to the task, adequately maintained and in accordance with statutory requirements and current good practice, with records kept of maintenance checks.

8 Vehicles and trailers are kept in a road-worthy condition, comply with existing regulations and are appropriately insured.

PROGRAMMING

9 There is a stated Code of Practice for each activity.

10 There are adequate and regular opportunities for the Party Leader to liaise with the provider and designated staff.

11 There are appropriate alternative programme options (Plan B) in the event of bad weather, staff illness or other unforeseen circumstances.
GENERAL

12 The Centre has a comprehensive Code of Conduct for visiting groups which will be provided in advance of any booking.

13 There is a clear documented definition of responsibilities between providers and visiting groups regarding safety, supervision, the programme and general welfare, which will be made available to the Party Leader in advance of any booking.

14 The provider complies with relevant safety regulations such as the Health and Safety at Work Act 1974, Environmental Health requirements and has a published health and safety policy.

15 The provider complies with requirements for public liability insurance cover. (Currently this should be at least £5,000,000.)

16 There are documented procedures for dealing with accidents, near accidents and emergencies and these records are available for inspection.

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

18 All staff working at the centre have received clearance to work with young people following a recent CRB check.

Please enter below if the Centre has “accredited centre status” e.g. with the British Canoe Union or the Royal Yachting Association, or if the Centre has an approval from any Association, such as with the British Activity Holiday Association:

ADDITIONAL COMMENTS:

___________________________________________________________________
___________________________________________________________________
___________________________________________________________________
___________________________________________________________________

SIGNED: ____________________________________

NAME IN CAPITALS: ____________________________________

POSITION IN ORGANISATION: ____________________________________

NAME & ADDRESS OF COMPANY: ____________________________________

___________________________________________________________________
___________________________________________________________________

TELEPHONE: ___________________________  FAX: ___________________

EMAIL: _________________________________  WEBSITE: _______________

Please return to the establishment listed at the top of this document. Please also send a copy to the Head of Strategic Risk Management at:

Surrey County Council
Room 168
County Hall
Kingston upon Thames
KT1 2DJ
EXCHANGE VISITS AND HOMESTAYS

Although the overwhelming majority of exchange visits and homestays are very successful and incident free, there have been incidents of abuse to and by exchange visit students.

Very practical advice and guidance is available from the Child Safe organisation. A copy of their booklet "Travel Safe - Advice for Schools" has been sent to all secondary schools. The LEA has also arranged for all secondary schools to have access to a new online programme called the "EVC SimplyClick Programme". Details of the programme and how to access it have been sent to all schools.

A summary of the advice is below.

Incidents of abuse might include:
- drug and alcohol abuse;
- profound neglect;
- physical assault;
- verbal abuse;
- racial abuse; or
- sexual abuse.

There might also be serious issues around hosts failing to provide:
- adequate care and attention;
- appropriate and adequate food; or
- privacy.

The two most common problems are:
- diet and food provision (consider diets necessary to religions and faiths); and
- behaviour (both by the exchange student or within the host family).

Checking Host Families at Home

Although this can be a sensitive issue it is important to check your own host families in Surrey who will look after students from your exchange, partner school. It is recognised that this procedure is aspirational and will not happen overnight. You should work towards this rather than stopping all exchange visits until the procedures are fully in place.

Good practice might include:

- A signed declaration from hosts. This would involve hosts agreeing to provide suitable accommodation that ensured appropriate privacy for the exchange student. Rooms should only be shared between young people of the same gender and of a similar age. The dietary needs of the guest would be catered for (including vegetarian meals or diets dictated by faith or ethnicity). The signed declaration should also confirm that no member of the household is an inappropriate person to be with young people.
- Home checks and interviews. Even if this does not happen, the school should retain the right to check the accommodation before the homestay took place.
- Random visits during the homestay. Again, this might not happen but should be agreed as an option.
- Evaluation forms completed by the student guest.
- CRB checks on the adults within the household. Once more, this might not happen but it would be a condition that this could be carried out. Any host family refusing this should not be selected.
It might seem that this suggested practice is excessive. The point is to have in place potential obstacle and barriers that would discourage inappropriate people from becoming hosts. Parents should also take comfort from the fact that you are taking this vetting procedure seriously and that you would ensure that your partner school abroad carried out similar checks, thus taking active steps to protect their children when abroad.

You might also consider providing your host families with the booklet “Advice for Parents and Guardians” available from the Child Safe organisation.

**Checking Host Families Abroad**

You should ensure that your exchange partner school carries out similar checks and vetting procedures. CRB checks or similar might not be available in some countries so an alternative means of checking will need to be employed.

**Preparing Young People**

The young people on the exchange should, before the exchange starts, have sufficient information on:

- the composition of the host family;
- where they will sleep (own room or sharing);
- any household pets (consider allergies, hostile animals, phobias, etc);
- food and diet (whether lunches, including packed lunches, are provided, special diets, etc);
- laundry facilities/washing clothes; and
- any visits or excursion with the host family (where these are of an adventurous nature such as skiing, these should also be agreed by the young person’s parent or guardian).

**Communication**

The young people on the exchange should be able to contact their own leaders at any time throughout the stay. A codeword should be given to the young people which would alert the party leader that something was wrong and that the young person needed an immediate visit.

If an allegation is made:

- treat any allegation seriously;
- follow the emergency procedures and contact your Duty Officer;
- immediately follow your school’s (or organisation’s) Child Protection Procedures and inform your nominated Child Protection Officer; and
- keep a record.

If the allegation is of a criminal nature, you must inform the local police.

Do not:

- promise confidentiality;
- panic;
- make promises you cannot keep;
- interrogate the young person (beyond establishing the nature of the allegation);
- attempt to investigate a serious allegation yourself; or
- do nothing.
Consider:

- preserving any evidence;
- photographs (caution - if this involves people);
- when parents should be involved (the duty officer would be in a better position to do this); and
- support and counselling.

Finally, remember that such incidents are rare. Good preparation and vetting procedures will significantly reduce the likelihood. Thinking about the unthinkable does not make it happen - quite the opposite.
PARENT’S CONSENT FORM

School
(or Youth Centre)

A journey to ________________________________ (place)
from ___________________ (date) to ___________________ (date) 19

I wish my son/daughter ________________________________ (name of child)
to be allowed to take part in the above-mentioned school (or youth centre) journey and,
having read the information sheet, agree to his/her taking part in any or all of the activities
described.

I have ensured that my child understands that it is important for his/her safety and for the
safety of the group that any rules and any instructions given by the staff in charge are obeyed.

Please delete and complete the following as is appropriate

My child has
	no illness, allergy or physical disability *

the following illness or physical disability *

*CROSS OUT WHAT DOES NOT APPLY

which necessitates the following medical treatment _________________________________

I consent to any emergency medical treatment necessary during the course of the visit.

I consent/do not consent* to my son/daughter being given a mild painkiller (paracetamol) if
considered necessary by the party leader.

*DELETE AS APPLICABLE

Signed ____________________________________________

Parent/Guardian

Guidelines for Educational Visits and Outdoor Activities
### Appendix D

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<th>ADDRESS</th>
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<th>WORK</th>
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**Telephone No.**  HOME ______________________  WORK ______________________

If not available at the above, please state an alternative contact.

**Name:** ____________________________________

**Telephone No:** ____________________________________

(Three copies of this form are desirable, one for the parent to keep, one for the Duty Officer and one for the Party Leader to take with him/her on the visit/activity/journey.)
EXAMPLE ROUTINE PERMISSION LETTER

Example A

To be written on the organisation’s letter headed paper

Dear Parent

As you will be aware, we often take children out on local visits in connection with work in the school. Local means .............................................................. (define for your establishment’s circumstances).

Each time we do this we have to ask you to consent for obvious reasons.

To make the organisation a little less complicated, I would be grateful if you would sign the accompanying overall consent form to cover any local visits for this academic year

Such visits would be either on foot, by staff or parent car, or by free coach and would have the requisite regulation staff supervision and cover.

We would of course still inform you if your child was going to be out, but with a global consent form there would be no need for you to reply each time.

On those occasions when visits involve any kind of cost and voluntary contribution, you will receive a letter with details and consent form as usual.

Yours sincerely

Headteacher
Guidance on information you may wish to acquire in confidence

MEDICAL QUESTIONNAIRE

PUPIL’S NAME ______________________________________________________

DATE OF BIRTH ____________________________________________________

PARENT’S NAME AND INITIALS ________________________________________

HOME ADDRESS ____________________________________________________

___________________________________________________________________

___________________________________________________________________

___________________________________________________________________

TELEPHONE NO _______________________

NAME AND ADDRESS OF FAMILY DOCTOR ______________________________

___________________________________________________________________

___________________________________________________________________

___________________________________________________________________

TELEPHONE NO _______________________

SCHOOL ___________________________________________________________

Has your child had any of the following

Asthma or Bronchitis
Heart condition
Fits, fainting or blackouts
Severe headaches
Diabetes
Allergies to any known drugs or medication
Any other allergies e.g. material, food, insect bites etc.
Other illness or disability
Any recent contact with contagious diseases and infections

YES NO
YES NO
YES NO
YES NO
YES NO
YES NO
YES NO
YES NO

If the answer to any of these questions is YES please give details overleaf.
Immunisation Status

Has your child received vaccination against Tetanus in the last five years? YES NO
Date if yes __________________________

Is your child receiving medical treatment of any kind from either your Family Doctor or Hospital? YES NO

Has your child been given specific medical advice to follow in emergencies? YES NO

If the answer to either of these questions is YES please give the details overleaf:
(including dosage of any medicines/tablets)

SIGNED _____________________________________

Parent/Guardian
Medicines
Any medicines that need to be taken during a school journey must be handed to the member of staff in charge of the journey by the parent/carer. The medicines should be in containers clearly labelled with the child's name, the type of medicine and the dosage instructions.

Medical History
Please give details of any of the conditions listed on the previous page where your answer was YES.
Parental Voluntary Contribution letter

Dear Parent/Guardian

**Proposed educational visit to**

Day and date ______________________________________________________

Purpose of visit ____________________________________________________

Time of departure ___________________________________________________

Estimated time of return _____________________________________________

Mode of travel _____________________________________________________

Dress ______________________________________________________________

Lunch arrangements _________________________________________________

Contribution £ _______________ to cover the cost to the school of providing
_________________________________________________________________

Additional information ______________________________________________

You are invited to make a voluntary contribution to cover the cost to the school of your son/daughter taking part in a visit described in the information set out above. We confirm that the voluntary contribution represents our estimate of the costs of providing this activity shared equally amongst all pupils. As the resources of the school are limited, the proposed visit will not take place if there are insufficient voluntary contributions to cover the cost of the visit. A copy of the Governors’ policy statement on the financial arrangement for visits is available at the school.

If you agree to your son/daughter participating in the visit, would you please complete and sign the accompanying consent form and enclose your voluntary contribution. Cheques should be made payable to the school.

Yours sincerely

__________________________

Enc
## Risk Assessment for:

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<thead>
<tr>
<th>Name</th>
<th>Organisation:</th>
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<table>
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<tr>
<th>Assessment undertaken (date)</th>
<th>Signed</th>
<th>Date</th>
<th>Review date</th>
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</table>

<table>
<thead>
<tr>
<th>Hazards</th>
<th>Who is at risk?</th>
<th>Control measures</th>
<th>Review</th>
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Educational visits and school journeys – VAT

1 The ‘Tour Operators’ Margin Scheme’ was introduced in April 1988 to meet various European Community requirements, largely as a result of complications about the place of supply and taxation in the EU country in which the supplier belongs. In essence, because of these complications, ‘tour operators’ were not required to issue VAT invoices, and thus any VAT included in the invoice could not be reclaimed. Changes in VAT rules mean that any VAT incurred on the accommodation element may now be reclaimed. The tour operator should be given advanced warning that the journey is non-business, so that an invoice with separately identified VAT on accommodation is provided.

2 It is important therefore that schools satisfy themselves that when negotiating with a tour operator or coach firm they establish whether or not the tour operator will issue a VAT invoice. VAT can only be reclaimed if a VAT invoice is issued.

3 Subject to the above, the VAT treatment of organised school visits can be summarised as follows:

(a) Any visit arranged for pupils by a local authority can be regarded as a ‘non-business’ activity when it can be directly associated with the normal school curriculum*. There is no requirement for the visit to be free of charge or specifically subsidised for VAT purposes.

(b) Where visits are charged to pupils at cost price they may be free from tax if they meet the conditions required for exemptions (see paragraph 4 below).

4 School visits will be exempt of VAT only if all the following criteria are met:

(a) The visit is to serve a clear educational purpose related to the normal school curriculum.*

(b) The visit is not primarily of a recreational or sporting nature except when these activities are provided as part of the normal school curriculum.*

(c) It is to be prepared and followed up in school.

(d) There are arrangements for the supervision of pupils by suitably qualified persons.

5 VAT statement - educational visits and school journeys
Headteachers are required to complete a VAT statement in respect of every educational visit or school trip that is classified as either ‘exempt’ or a ‘non-business’ activity (see paragraph 3). The statement includes a certificate as to the conditions of exemption, and a financial statement regarding the financing of the trip. The completed statement should be retained by the school, together with copies of the relevant invoices, and filed in such a way that they can be readily made available for inspection by either the auditors or the VAT inspectors.

*Normal school curriculum’ is used here to mean the wider school curriculum and aims and not just core subjects of the National Curriculum.
Example of personal/private vehicle
insurance form

I confirm that I hold a valid licence to drive my vehicle, to be used to transport young
people from ............................................... establishment, and have the following
valid and up-to-date documents:

- Insurance
- Road Tax
- MOT

* tick box

Signed ............................................................

Date .............................................................
FIRE PRECAUTIONS AND EVACUATION PROCEDURES

Precautions
All premises with fire certificates should have fire routine notices. Ensure that all members of the group understand them - do not take it for granted that they will read them without prompting. If necessary, read the instructions to them.

Obtain advice from the management on the means of escape available, and investigate ALL means of escape to ensure that they are adequate and unobstructed. Emergency exit doors need to be checked to ensure that they can be readily opened from the inside.

Check on fire alarm call point positions. Ensure that each member of the group knows where the nearest call point is located in relation to his/her room.

Special precautions against fire are necessary when camping, particularly during periods of dry, hot weather.

Smoking in rooms must be expressly forbidden.

Supervisory staff should have rooms next to or very close to party members.

A suitable assembly point must be established.

A fire drill must be conducted as soon as possible after arrival using the alarm systems available. This drill must be taken seriously and repeated if necessary until the party leader is confident that every member of the group would:

(a) recognise the alarm;
(b) know the most suitable escape route;
(c) be aware of any other emergency fire procedures relating to those particular premises;
(d) proceed to the assembly point in an orderly manner.

In the Event of Fire
Give priority to the evacuation of persons in your group.

If it is safe to do so, check that those in your group have heard the alarm and are evacuating the premises.

Do not use lifts.

Do not attempt to collect baggage, valuables etc.

Check that all persons are accounted for by carrying out a roll call. Sub-groups are particularly useful for carrying this out accurately and speedily.

If any members of the group are missing, report them immediately and without fail to the Fire Officer in charge at the scene.

On no account should you or any member of your group re-enter the premises to locate or attempt to rescue missing persons after carrying out the procedure above.
ENTITLEMENT TO DRIVE A MINIBUS -

Extract from Minibus Operation Bulletin February 2003

UK drivers who passed their ordinary car driving test prior to 1 January 1997 will normally have been issued an old style UK Driving Licence showing vehicles of Group A or a new style EC Driving Licence showing vehicles of Categories B, C1 and D1. Drivers who passed their ordinary driving test after 1 January 1997 are only issued a Driving Licence showing vehicles of Category B (up to 8 passenger seats); Categories C1 and D1 are no longer issued automatically.

Driving Licence Category D (9 or more passenger seats) or Category D1 (9 to 16 passenger seats).

All drivers of minibuses (9-16 passenger seats) are required to hold a valid driving licence showing either Group A on an old style UK Licence or Category B and D or D1 on a new EC style Licence issued in any EU Country.

Drivers who passed the car test (Category B) after 1 January 1997 and who wish to drive a minibus are required to take a further Statutory Driving test for vehicles in Category D or D1. However; certain drivers who passed the car test (Category B) after 1 January 1997 are permitted to drive a vehicle in Category D1 (minibuses) without the need for a further test so long as the following conditions are met:-

- A full driving licence has been held for at least two years
- The driver is aged 21 years or over
- The driver receives no payment (or any other consideration) other than out of pocket expenses (i.e they are a volunteer)*
- The vehicle is driven for social purposes only
- There is no trailer attached
- The maximum authorised mass (mam) of the vehicle does not exceed 3.5 tonnes, or if fitted with specialised equipment used for disabled passengers, does not exceed 4.25 tonnes.**

*This exemption for ‘Voluntary’ drivers does NOT include teachers who wish to drive as a ‘goodwill’ matter. A teacher driving a school minibus carrying pupils on an organised trip, cannot be considered to be a volunteer and therefore if they passed the car test since 1 January 1997, they must take a further Statutory Driving Test to obtain a Driving Licence showing vehicles in Category D or D1. The same judgement would be made for a youth worker.

**Many standard minibuses (including those operated by the Council’s establishments) have a maximum authorised mass exceeding 3.5 tonnes and those fitted with specialised equipment used for disabled passengers usually exceed 4.25 tonnes maximum authorised mass. (Gross vehicle weight – gvw) Details of the maximum authorised mass can be obtained from the Vehicle Identification Number (VIN) Plate, usually located within the engine compartment or within the cab of the vehicle. The mam or gvw of the vehicle is specified in kilograms.

Consequently, to avoid the very significant risk of a driver, who does not possess a suitable driving licence, driving a minibus, the Council requires that all drivers of minibuses will either possess an old style UK Driving licence, showing vehicles of Group A, or an EC Style Driving Licence showing vehicles in Categories B and D or D1.
Driver Hours and Driver Fatigue

Teachers and youth workers driving minibuses are not professional drivers and often have to drive in addition to other duties. It is known that driver fatigue has been an important factor in some serious accidents involving minibuses.

The EVC and Head of Establishment must ensure that excessive demands are not made on drivers.

As a general rule, there should be two drivers per minibus if either:

- the journey is likely to exceed two hours; or
- the journey happens at the end of a working day unless the journey is local only.
Educational Visits Emergency Procedures

Party Leader
phones
Duty Officer
(available)

[No further initial notifications required of Party Leader]

Duty Officer
Phones
County Hall Switchboard
(In hours)
Or
Emergency planning Officer
(out of hours)
phones Senior Officer

Emergency Planning Officer
phones Senior Officer

Senior Officer
contacts

1 Duty Officer

2 Headteacher/Unit Head

3 County Council Press Office

4 Supports Duty Officer and/or Head in dealing with parents and others involved in the situation
IN CASE OF FATALITY OR EMERGENCY :

- Inform local emergency services
- Inform duty officer
  - Work tel:
  - Home tel:
  - Fax:
  - Mobile number:
- If duty officer unavailable, call SCC Duty Emergency Planning Officer (tel: 07831 473039)
- You will be answered by either:
  - The SCC Emergency Planning Officer - quote OPERATION DUKE
  - An duty answer phone – quote OPERATION DUKE, leave a message and your number.
    You will be called within 5 minutes
  - A messaging service - quote OPERATION DUKE, leave a message and your number.
    You will be called within 5 minutes
- DO NOT SPEAK TO PRESS OR MEDIA

Refer to County Council Press Officer
Daytime tel: 0208-541 8996/9962
Out of hours tel: 0208 541 7920

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Guidelines for Educational Visits and Outdoor Activities
Try to prevent staff and young people phoning home until contact has been made with your Duty Officer or Emergency Planning Officer

When contacting duty officer or emergency planning officer be prepared to give the following information:

- Quote ‘operation duke’
- Your full name
- The telephone number you are calling from
- Name of group involved
- Exact nature of the incident
- Is a fatality involved? Has it been confirmed? By whom?
- Full name(s) and ages of injured person(s)
- Exact nature of injuries
- Whether local police or emergency services have been informed
- Whether any next of kin have been informed, if so, how?
- If contacting Emergency Planning Officer, name and number of unobtainable duty officer
Sample Emergency Contact Form

Name of educational establishment: .............................................................................
Address: ........................................................................................................................
Tel no: ............................................................................................................................
Name of destination: .....................................................................................................
Full postal address: ........................................................................................................
Daytime tel no: ........................................ Evening tel no: .........................................
Name of duty officer or head of establishment: ..........................................................
......................................................................................................................................
Daytime address: ..........................................................................................................
Tel no: ..................................................... Evening tel no: ........................................

Participants, including leaders

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Guidelines for Educational Visits and Outdoor Activities
School visits to countries in the European Union: 
Guidance on visa exemption

The following guidance comes from the British Council and can be viewed on its website: www.britishcouncil.org/education/schools/visa.htm. The education section of the British Council’s website has many topics of interest for schools travelling abroad.

This page has detailed guidance on how to secure visa exemption for pupils who are nationals of countries outside the European Union, and who are travelling as part of a school party from the UK to or through another EU country.

To obtain a List of Travellers for these purposes, please contact the British Council Information Centre, Telephone: 0161 957 7755. (As the List of Travellers acts as a travel document, and original copies are required, it is not downloadable from this web site.)

Introduction

1 This guidance is intended for governors, headteachers and other staff of a general education school in the UK responsible for organising school visits to countries in the European Union (EU).

2 It concerns a Decision that the Council of the EU made on 30 November 1994 affecting such visits, and it explains the practical implications of this for British schools.

NB: These regulations do not include youth groups. There are no special arrangements currently for such groups.

Background

3 In the past, third country national school pupils (that is, those who were not nationals of the UK or any other EU country) travelling with a school party were, depending upon their nationality, required to have a visa to travel to another EU Member State.

4 To make it easier for pupils from third countries resident in Member States to travel within the EU as part of a school group certain measures were agreed.

5 As from 15 April 1996 other Member States no longer require schoolchildren travelling from the UK who do not have a British or other EU country passport to hold a visa, provided that they are:

(a) legally resident in the UK (their passport should contain a stamp from the Immigration Directorate confirming this);

(b) travelling as part of a school party; and

(c) in possession of a valid travel document (e.g. a passport of a non-EU country) that is in the pupil's name only.
Appendix O

Practical implications

6 Such pupils can now benefit from visa exemption, provided the following requirements are met:

(a) the pupil must be travelling as a member of a general education school group on a school visit;
(b) the pupil must be registered at the school;
(c) the group must be accompanied by a teacher from the school in question who is able to present an official list (List of Travellers, see below) of the pupils he or she is accompanying;
(d) the pupil must be in transit through the partner country (or countries) or staying in it (or them) for only a short period of time;
(e) the pupil can show their own valid passport or other document satisfactorily establishing identity and, where appropriate, nationality, which is acceptable to the country or countries to be visited.
(f) The List of Travellers must be used for any general education school visit to a Member State in which a third country national pupil who is seeking a visa exemption is included.

List of Travellers

7 The List of Travellers has been officially accepted for common use by all the EU Member States (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and the UK). Its purpose in the UK is to enable British general education school parties to obtain a visa waiver for individual pupils who would normally require visas, because of their nationality, in order to travel to other EU Member States.

8 The form is not, however, a valid travel document in itself: each individual pupil in a school group must carry a travel document, preferably a passport, valid for entry to the country or countries of destination or transit.

9 The form must be used to secure visa exemption for pupils who are nationals of third countries (i.e. who are nationals of countries who would normally require visas). The form should not normally be used for pupils who have British passports. However, where the holder of a British Overseas Citizen, British National Overseas or British Dependent Territory Citizen passport requires a visa to visit the country in question, then the pupil can be included on the form. Please contact the visa or consular section of the relevant embassy if you are in any doubt.

10 The form can only be used in conjunction with passports or other valid travel documents. For this reason the words Not Applicable appear across certain sections of the form. You should not complete these sections, nor put photographs on the form.

11 The form can only be used by general education schools. It is not for the use of specialist institutions such as schools of English, secretarial colleges, FE colleges or other such establishments.

12 The form must include the details (name, date and place of birth and nationality) of all pupils needing visa exemption travelling in the party. It is not essential to include the names of all pupils travelling. However, teachers may wish to list them to avoid creating a distinction between pupils applying for visa-exempt status and other pupils.
13 On each occasion an original copy of the form must be used; photocopied or faxed versions will not be acceptable.

The List of Travellers is available from the British Council Education and Training Group, Telephone: 0161 957 7755.

14 The completed form must be authorised - stamped and signed - by the head of the school. A form must be completed for each visit, and each form must be authorised by the headteacher or principal of the school. Notes on how to complete the form are given on the reverse of the form.

15 The List of Travellers must be held by the teacher accompanying the group and shown to immigration on arrival in the country of destination. It does not require any further authorisation from the Home Office nor from the British Council Education and Training Group.

Further information

16 Further information can be obtained from:

The Home Office
Immigration and Nationality Directorate
Immigration and Nationality Enquiry Bureau (INEB)
Lunar House
40 Wellesley Road
Croydon
Surrey
CR9 2BY

Telephone: 0870 606 7766
DRAFT

MODEL POLICY

FOR

OUTDOOR EDUCATION

AND

OFF-SITE EDUCATIONAL VISITS
Appendix P

Suggested Draft Policy for School visits and offsite activities

This draft policy is to assist you in drawing up a document that is relevant to your own establishment. There will be a need to ‘customise’ it to include relevant documents, procedures and other specific requirements that your Governing Body (or Management Committee) and head of Establishment have agreed.

CONTENTS:

1. Introduction
2. Roles and Responsibilities
3. Guidance Notes for Off-site Educational Visits

The following are appendices you might consider compiling if appropriate.

Appendix A - Parental Consent
Appendix B - Internal Permission/Cover arrangements
Appendix C - Risk Assessment form
Appendix D - External Providers form
Appendix E - Off-site Activity Monitoring form
Appendix F - Checklist for all Off-Site Activities
Appendix G - Work experience guidelines
Appendix H - Staff records of off-site experience & qualifications
Appendix I - Emergency Response Plan
Model Policy for Outdoor Education and Off-site Educational Visits

1. Introduction

1.1 The school provides many opportunities for its students/children/young people to enrich and enhance their on-site learning through use of Outdoor Education and Off-site Educational Visits. This encompasses residential activities, environmental studies, sports, physical and cultural activities, business visits, conference and adventurous activities. You will need to add your own establishment’s views, comments and ethos here. Please use this as an opportunity to make clear what you consider are the values of offsite, educational experiences. The following are values identified by participants on EVC training courses but you will need to amend to fit the tone of your policy:

- broadening horizons
- fun
- self-esteem
- decision-making
- relationship building (staff and young people)
- risk taking
- understanding risk
- experiencing new cultures
- raising aspirations
- responsibility
- motivation
- inclusion
- a chance to share
- lifelong leisure activities
- creativity
- independence
- invaluable part of citizenship
- ‘real’ learning
- team building
- consequences related to actions
- allow success
- learning to cope with failure
- living and working with others
- bringing the curriculum alive
- magic moments – memories for life

1.2 The value of off-site educational visits is well recognised by the Governing body (Youth Centre Management Committee) and fully supported throughout the school. It is emphasised that a culture of safety must prevail and there is a need for careful planning and adherence to statutory procedures. Off-site educational visits must be well managed, information communicated and responsibilities recognised.

1.3 This document outlines the specific policies and procedures for school/youth centre. It supplements and follows the advice and guidance contained within the following significant publications:

Guidelines for Educational Visits and Outdoor Activities
Appendix P

- SCC Guidelines for Educational Visits and Outdoor Education Activities
- The Health and Safety Executive in conjunction with the Department for Education and Skills (DfES) published “Health and Safety Responsibilities and Powers” statutory document.
- The DfES document “Health and Safety of Pupils on Educational Visits” (HASPEV)
- The supplementary guidance published by the DfES
  - Part 1 - Standards for LEA’s in overseeing educational visits
  - Part 2 - Standards for Adventure
  - Part 3 - a handbook for Group Leaders

2. Roles and Responsibilities

2.1 The Governing Body satisfies itself that the appropriate procedures, risk assessments, and control measures are in place and that the documented guidance notes are being followed. All off-site visits that are residential, abroad, or hazardous need to be approved by the Governing Body. Such approval must be recorded in the minutes of the Governing Body.

2.2 The Head Teacher is delegated by the Governing Body to approve all off-site educational visits of a perceived low risk, local, daily or regular nature.

2.3 The Educational Visits Co-ordinator (EVC) ensures that all off-site activities follow the correct procedures. The person with these responsibilities (could be the Head Teacher) will approve the group leader for every visit and monitor the written risk assessments to ensure good practice. In addition, the following responsibilities and duties are undertaken:

- Support the group leader in identifying the purpose for the visit and the selection, training and briefing of appropriate supervising adults and volunteer helpers.
- Ensure that Criminal Records Bureau disclosures are in place where necessary
- Arrange Emergency Contact Duty Officer and draw up proper procedures to be followed in such an event.
- Keep records and make reports of accidents and “near accidents"
- Review and regularly monitor procedures
- Liaise with the LEA Outdoor Education Adviser to ensure the proposed visit complies with the LEA regulations.

2.4 The Group Leader is responsible for identifying the purpose of the visit and following the checklist published in the LEA guidance. A risk assessment is necessary for all off-site visits. Significant risks and their control measures will need to be recorded and filed with the EVC.

This will take account of:

- Generic risks as published in this document and the LEA Regulations and Notes of Guidance for Off-site Activities.
- Event Specific Risks as identified from a pre-visit or thorough knowledge or experience of the environment, accommodation, the leader’s competence, the group and other factors such as transport.
- **On-going risks** identified by the professional staff responding to changing circumstances and the success of planned activity and procedures. The participants and staff will be fully briefed on the purpose and the risk assessment control measures.

2.5 **Participants** are encouraged to consider risks involved in an off-site educational activity and to assist in the design of appropriate risk management strategies that support their learning.

3 **Guidance Notes for Off-Site Educational Visits**

To ensure proper good practice and compliance with the necessary regulations it is expected that:

3.1 All group leaders will familiarise themselves with the published advice and guidance. Further information is available from www.teachernet.gov.uk/visits. Training for group leaders will be arranged to include all aspects of supervision, ongoing risk assessments (including being prepared to stop an activity that has become too hazardous) and how to deal with an emergency.

3.2 In order to plan an off-site activity the EVC (or Head of Department/faculty/year) should be involved in discussing plans at an early stage. Routine or local visits such as games matches need to be planned ahead also. It may be possible to approve a series of events on a termly basis. No financial commitment should be agreed until all relevant approvals have been achieved.

3.3 **Parental Consent**. Copies must be available for the Emergency Contact and the Group Leader to take on the visit.

3.4 **Internal Approval Form**. This local form is to achieve any necessary cover arrangements.

3.5 **Off-site Activity Monitoring Form**. This must be completed for all residential visits and for those that are either visits abroad or for hazardous pursuits. It will need to be signed by the Head of Establishment and submitted to the LEA one month in advance and certainly before becoming financially committed. These types of off-site activity also need the Governing body’s approval.

3.6 **Evaluation Report**: On return the Group Leader must report to the EVC and, where necessary, an evaluation report should be completed in order to achieve any learning about a ‘near miss’ or where an incident took place but fortunately did not require the completion of an Accident/Incident report form. Perhaps such a form was completed at the venue, however, this does not remove the need to place such an occurrence on the record at the ‘home’ establishment. A general evaluation of the visit will inform future visits and may be a useful check on the value of the risk assessments undertaken.

3.7 **Risk Assessment forms** should be completed and lodged with the EVC when risks are perceived as significant. External providers will have their own risk assessment documents that can be used to help in this process. For certain activities an Adventurous Activity Licence is legally required. (See the LEA guidance or www.aala.org.uk) If this is the case their licence number need only be quoted instead of actually requiring their documents.

The Appendices, recommended in the contents section, will need to be included here. This should provide an opportunity for the establishment’s internal documents, some of which will help staff to follow correct safety considerations and procedures, to be brought together and held in one place.
EU Directive on package travel
Guidance for schools and youth organisations

This directive has been implemented in the UK by means of the Package Travel, Package Holidays and Package Tours Regulations 1992, which took effect on 31 December 1992.

What is it?
It has been designed to create a ‘level playing field’ for all travel organisers throughout Europe. It requires travel organisers to safeguard consumers’ money and, in the case of insolvency, to make arrangements for repatriation. They must understand that they are strictly liable for all the elements of the package.

Will it affect you?
Yes it might, if your educational establishment puts together a ‘package tour’ (a pre-arranged combination of any two of the following elements: transport, accommodation and other tourist services) ‘other than occasionally’. The Department of Trade and Industry regards once or twice a year as occasional but not all Trading Standards Officers agree.

Educational trips
The Department of Trade and Industry takes the view that if a ‘package tour’ is an integral part of a course of education, it may be outside the scope of the new regulations – i.e. a field trip as part of the geology syllabus is exempt. A commercial organiser that ‘sold’ the field trip package to a school would, however, be liable.

Holiday trips
In most cases, Surrey schools and youth groups will buy a package already arranged by an ABTA- or CAA (ATOL)-bonded tour organiser. Therefore the new regulations should help to prevent Surrey establishments from being ‘stranded’ financially and, in some cases, literally!

Those few education establishments that organise a holiday package tour themselves will need to meet the requirements of the regulations.

If that means your trip, what do you have to do?
The consequences need not be particularly onerous. For example, the requirements in the regulations dealing with the provision of information are straightforward. All education establishments expect to deliver what they have promised.

How do you protect the deposits?
The regulations require evidence of the security for deposits and for repatriation in the event of insolvency. Schools and youth organisations as non-business establishments can hold any deposits in a TRUST ACCOUNT separate from any other funds. The organiser may draw upon this account to pay for the services making up the package in advance of it actually taking place. This is probably not very different from current arrangements. Provided the monies held on trust were adequate to buy return tickets (which they should be), the requirement relating to repatriation would be met as well.

The moral to this tale would appear to be that school and youth organisations should be encouraged to use properly bonded commercial providers in preference to the DIY option.

Guidelines for Educational Visits and Outdoor Activities