

# Off-site Visits

## - Policy and Guidance

### September 2023

version	Details of changes	Reviewed by	Approved	Review Date
1.0	New Policy	D Barham	S Mitchell	July 2019
1.1	No changes	D Barham	P West	July 2020
1.2	Updates to risk assessments	D Barham	P west	July 2021
1.3	Completed example risk assessments	K Burbage	P west	July 2022
1.4	Change of outdoor consultant	K Lewis	P west	July 2023

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## Section 1 - Introduction

Thank you for working to engage our students in activities outside of the classroom – it is great to see extra activities taking place that enrich the learning and curriculum we provide daily.

Learning beyond the classroom is a powerful vehicle for providing opportunities both for concentrated study and activity, and promoting young people's social, personal and moral development. They are an opportunity to extend pupils' learning and enrich their appreciation and understanding of themselves, others and the world around them. They can be the catalyst for improved academic performance, a lifetime interest or in some cases professional fulfilment.

Across SAT we use the Exeant system to manage our Learning Outside the Classroom activities. This should be considered the one point of truth for trips management.

Exeant is accessed through [www.satrust.com/trips](http://www.satrust.com/trips). Your EVC will be able to provide log on details and training on how to use the system. Further guidance is available at <http://www.exeant.co.uk/documentation>. There is also a guide at the end of this document which should help you navigate exeant.

We also retain specialist advisors, Evolve Advice Ltd, to provide support to EVCs and Principals in risk assessing and planning trips. Evolve have advisors who sit on the national committee that sets standards for Learning Outside the Classroom, and they have vast experience in providing and managing such activities. Please do contact them as necessary:

Email: [advice@evolveadvice.co.uk](mailto:advice@evolveadvice.co.uk)

***This Offsite Visits –Operational Procedures document, and associated other documents referred to within applies to all employees of The Spencer Academies Trust (referred to as “Spencer” or “the Trust”).***

If you have any queries about how we manage trips, or require further training please contact me at the details below.

Kylie Lewis [kylielewis@satrust.com](mailto:kylielewis@satrust.com)

## Section 2 - Responsibilities

Various personnel have responsibility and accountability for the safe organisation, and delivery, of any off-site visit or outdoor adventurous activity. Although all Spencer academies have adopted the “OEAP National Guidance (OEAPNG)” as “The Spencer Academies Trust Employer Guidance” the following will quickly clarify the situation. Links are also provided to the definitive pages on the NationalGuidance website.

The OEAPNG guidance can be accessed here: <https://oeapng.info/>

All staff engaged with the planning of trips should make themselves familiar with the above website, and the guidance therein.

### The Employer – The Trust

The Trust has overall responsibility for Health & Safety on all ventures, this is a responsibility that cannot be delegated but elements can be delegated to individual academies, and staff. Where this responsibility is delegated it is exercised on behalf of the Trust and we have in place robust systems to monitor such work. The Trust has the responsibility for advising employees on best practice, safety and other considerations that are contained in this document and National Guidance. SAT’s responsibilities can be summarised as;

- The health, safety and welfare of staff.
- The health and safety of young people both in establishments and on off-site visits.
- The health and safety of visitors to establishments, and volunteers involved in any in on-site activity.
- Appointment or identification of an Outdoor Education Consultant.
- Providing written guidelines for staff including advice on risk assessment.
- Assess proposals for certain types of visit and authorise certain types of venture.
- Provide emergency telephone contact for the duration of the visit where necessary and practical support for crisis management.
- Ensure training needs have been addressed.
- Provide relevant training to those engaged in running ventures.
- Provide access to named staff for advice.
- Maintain appropriate insurance cover.
- Have in place procedures to monitor and review safety during off-site visits and activities

For further guidance see: <http://oeapng.info/>. EVCs should check this site regularly for updates to best practice and checklists for trips management.

## Outdoor Education Consultant

The Trust have appointed EVOLVE Advice as our Educational Visits and Outdoor Education Consultants. EVOLVE Advice are committed to supporting schools and the Trust to provide impactful, enjoyable and high quality, well-managed visits.

Collectively, the EVOLVE Advice team comprises Outdoor Education Advisers, Educational Visits Advisers, Technical Advisers and support colleagues. Our team are members of relevant professional associations such as the Outdoor Education Advisers' Panel (OEAP), The Institute for Occupational Safety & Health (IOSH), the Association of Heads of Outdoor Education Centres (AHOEC), National Governing Bodies (NGB's) and have a strong working knowledge of leadership in the outdoors, the education sector and Health and Safety. The team are experienced, effective EVC and Visit Leader Trainers and LOtC Quality Badge Assessors. Further information regarding the team can be found at: <https://www.evolveadvice.co.uk/meet-the-team>  
He can be reached at the following contact details:

Email: [advice@evolveadvice.co.uk](mailto:advice@evolveadvice.co.uk)

## Principals

Principals should ensure that academy practice follows the requirements and recommendations of their employer's policy. They should also have an academy Visit Policy that makes a formal statement linking their policy to employer policy, as well as setting out internal procedures to implement both policy and guidance.

Principals should be aware that the appointment of an academy Educational Visits Coordinator (EVC) is critical to the implementation of this policy. All academies should have a currently validated EVC. This is a requirement in employer policy and Principals should act accordingly. The Trust provides an EVC Forum. This forum is organised by the Trust health and safety manager in liaison with the Trust external consultants.

Principals should be aware that the EVC they appoint should meet the criteria as defined and determined by their employer policy (see below).

Principals should designate a named person to fulfil the role of EVC but may choose to designate themselves.

When the Principal has not designated a named member of staff, then the functions of the EVC will automatically be attached to the Principal.

For further guidance see: <http://oeapng.info/head-manager/>

## Educational Visits Coordinators (EVCs)

Those appointing an EVC should ensure that the designated person has undertaken the EVC training required by the Trust and that they meet any person specification recommended by the Trust.

In order to carry out the full range of functions expected of an EVC (which includes taking a lead on assessing Visit/Activity Leader competence within the academy), EVCs must have:

- Attended an employer-led EVC Training Course and have revalidated this accreditation if that is required;
- Significant experience of practical off-site activity and visit leadership
- Status within the establishment that enables them to guide the working practices of their colleagues
- Attend update forums

The role of EVC cannot be seen as purely administrative. However, an academy may choose to send more than one member of staff to EVC training so that the administrative tasks can be separated from the operational functions.

The EVC should ensure that all off-site activities put in place by their academy meet the requirements of their employer's policy, as well as the requirements of academy policy and procedures. EVCs should therefore be a focal point of off-site activity planning within their academy. By the use of the Exeant database they should keep appropriate records of all off-site activity and ensure that there is sample monitoring of provision.

The EVC must:

- Ensure that there is an academy link policy for off-site activity.
- Lead on assessing competence of appointed leaders.
- Organise training and induction of Visit/Activity Leaders and Assistant Leaders.
- Ensure that there are administrative audit trails.
- Sample monitor activities to ensure that there is a match between policy and field operations.
- Ensure that systems and procedures are reviewed.

For further guidance see: <http://oeapng.info/evc/>

## Visit and Activity Leaders

Those formally appointing a designated Visit or Activity Leader should take account of the following:

- A Visit/Activity Leader should be formally approved for the event-specific activity.
- A Visit/Activity Leader must be formally assessed as being competent.
- To ensure that those leading visits have appropriate understanding of employer policy, THE Trust will provide formally accredited Visit Leader training.
- The officially approved and designated Visit/Activity Leader should be:
- Accountable (being accountable implies being an employee, or legally contracted - and thus part of a chain of specified roles and responsibilities with a clear audit trail)
- Competent
- Confident (a leader who is not confident may not be effective).

Competence requires that the leader can demonstrate the ability to operate to current standards of recognised good practice and the following indicators of competence should be in place:

- Appropriate knowledge and understanding of:
  1. employer policy reinforced by formal training
  2. establishment procedure reinforced by a formal induction
  3. the group, the staff, the activity and the venue
- Recent and relevant experience;
- In certain cases, a formally accredited qualification e.g. first aid, adventure activities leadership/coaching award.

Where a Visit Leader or Assistant Leader plans to provide their own adventurous activities to young people, it is compulsory that competence is externally and credibly verified.

This can be achieved by:

- holding a current NGB leadership award (or equivalent);

A Visit/Activity Leader **must** follow employer policy and academy policy and procedures.

A Visit/Activity Leader **must** ensure that the activity is properly planned and that the plan includes appropriate risk management procedures based on a risk-benefit analysis. This will include the use of all appropriate P.P.E. for staff and students e.g. Cycle, ski, climbing and water sport helmets, clothing, footwear, etc.

A Visit/Activity Leader **must** ensure that the roles and responsibilities of other staff (and young people) are properly defined and communicated, ensuring effective supervision.

For further guidance see: <http://oeapng.info/visit-leader/>

## Assistant Leaders

Those appointing Assistant Leaders should ensure that those appointed are:

- Suitably competent and knowledgeable about academy and employer policies/procedures, insofar as they affect the responsibilities they have been assigned.
- Specifically, competent to carry out such tasks as they are assigned.
- Fully briefed to ensure that they understand the role and responsibilities expected of them.

For further guidance see: <http://oeapng.info/assistant-leader/>

## Volunteer Helpers

Those appointing Volunteer Helpers must ensure that those appointed are:

- suitably competent and knowledgeable about academy and employer policies/procedures, insofar as they affect the responsibilities they have been assigned;
- confident in their understanding of the role and responsibilities that they have been assigned and how these integrate with other staff;

- enabled to contribute to the evaluation of all aspects of the visit/activity;
- appropriately briefed on:
  - group characteristics, including age, health, capabilities, special educational needs, behaviour and any other relevant matters in the context of the visit.
  - nature and location of the activity.

Where the Volunteer Helper is a parent (or otherwise in a close relationship with a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management, particularly if there is a serious incident. There is a probability that the Helper may be distracted by the needs of their own child, rather than looking to the needs of the whole group. This means that the Visit Leader should directly address this issue as part of the Risk-Benefit assessment and not assign a Volunteer Helper to a leadership role which gives them a direct responsibility for their own child, other than where this is a risk-managed part of the master plan.

For further guidance see: <http://oeapng.info/download/1128/>

## Those in a position of Parental Authority

Those in a position of parental authority should be aware of the following:

- Their right to full information.
- Their need to provide full information about their child.
- The requirements for parental consent (where applicable).
- The need for parents and young people to have a proper understanding of behavioural expectations and sanctions which may be set out in a Code of Conduct.
- The need to provide the Visit Leader with a 24/7 home emergency contact number.

For further guidance see: <http://oeapng.info/parents/>

## Section 3 - Employer Policy

*This Management of Learning Outside the Classroom policy applies to all employees of The Spencer Academies Trust (referred to as “Spencer” or “the Trust”).*

### 1. Provision of Employer Guidance

The Trust has formally adopted “Outdoor Education Advisors Panel National Guidance (OEAPNG)” as “The Spencer Academies Trust Employer Guidance”. This OEAP guidance can be found on the following web site:

[www.oeapng.info](http://www.oeapng.info)

The Trust employees must read this policy before seeking information from the [www.oeapng.info](http://www.oeapng.info) website.

It is a legal expectation that employees must work within the requirements their employer’s guidance; therefore, the Trust employees must follow the requirements of “OEAP National Guidance”, as well as the requirements of this Policy Statement.

The Trust employees should also follow OEAPNG recommendations.

Where the Trust employee commissions other parties to run LoTC activity, we must ensure that such commissioned parties have either:

- adopted The Spencer Academies Trust Employer Guidance or OEAP National Guidance
- or
- have systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

All Spencer academies are required to have a suitable policy for all LoTC/offsite visits and activities that clearly references the Employers Policy i.e. The Spencer Academies Trust Policy.

### 2. Scope and Remit

The OEAP NG document <https://oeapng.info/essential-reading/> clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom;

- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base;
- This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP NG document: "[Underpinning Legal Framework](#)"

### 3. Ensuring Understanding of Basic Requirements

As an employer, the Trust is required to ensure that its employees are provided with:

- appropriate guidance relating to visits and LOtC activity;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed Consultants that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the management of outdoor learning and LOtC for The Spencer Academies Trust establishments is the OEAP National Guidance web site: [www.oeapng.info](http://www.oeapng.info)

The relevant training courses for the Trust employees are:

- **Spencer Educational Visit Coordinator (EVC) Training** - **All** Trust academies are required to have a current Spencer trained EVC in post. If an academy does not have a nominated EVC, then that role will by default rest with the Principal
- **Spencer Educational Visit Coordinator (EVC) Revalidation** - **All** Spencer establishments are required to ensure that their EVC undertakes a formal revalidation normally every three years.
- **The Trust Visit Leader Training** – this course is required for all those within the Trust who lead LOtC activities. Visit leaders must be kept updated and current by the academy EVC. The EVC must ensure all appropriate messages received at the annual EVC Forum, message board and all other relevant Spencer communications are formally made available.
- For the purposes of day-to-day updating of information, the Trust EVCs and Visit / Activity Leaders are directed to the posting of "EVC Information Updates" (which include information on how to access the relevant courses) available on the following web link : [www.oeapng.info](http://www.oeapng.info)

Where an employee's experience problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their academy's Educational Visits Coordinator (EVC), or the Outdoor Education Consultant nominated by their employer.

The nominated officer/consultant in The Spencer Academies Trust is as shown in Section 1 of this document – Evolve advice

## 4. Approval and Notification of Activities and Visits

The Trust uses an online database system for notification and approval called Exeant which is accessed at <https://satrust.exeant.co.uk/>

A key feature of this system is that visits and LOtC activities requiring approval are automatically brought to the attention of the Trust and relevant people within academies.

It is a requirement that all Spencer academies use the Exeant system for visits and activities that need approval. It is also required that academies within the Trust adopt this as their internal system to record all their LOtC visits and activities. This will enable the Trust to access relevant information from the system should a LOtC activity or visit need support.

Visits requiring approval by the Spencer Academies Trust should be submitted for final approval at least 4 weeks prior to the day of the visit wherever possible. ***However, in the case of any overseas visits, complex visits such as expeditions abroad or visits that have high financial risk, it is essential that pre-approval is sought before any contract is signed with the provider and before any financial transactions are made.***

For further advice and help using the Exeant system, the academy should contact the nominated officer.

The nominated officer in The Spencer Academies Trust is:

Name: Kylie Lewis

Role: Health & Safety  
Manager

E-mail [klewis@satrust.com](mailto:klewis@satrust.com)

## 5. Risk Management

As an employer, the Trust has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring the Trust to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. the Trust strongly recommends a "Risk-Benefit Assessment" approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is "acceptable". HSE endorse this approach

through their “[Principles of Sensible Risk Management](#)” and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal or Spencer requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. However, the Trust EVC Training ensures that academies are supplied with an electronic generic risk-benefit assessment for LOTC and visits. Further exemplar event-specific assessments, risk management materials and advice are available by contacting the Outdoor Education Consultant, and through accessing our library of such documents at [www.satrust.com/trips](http://www.satrust.com/trips)

Spencer Academies Trust establishments will adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of LOTC learning opportunities.

Refer to OEAP NG document: “[Risk Management](#)”

## 6. Emergency Planning and Critical Incident Support

A critical incident is an incident where any member of a group undertaking an off-site activity has:

- either suffered a life-threatening injury or fatality;
- is at serious risk; or
- has gone missing for a significant and unacceptable period.

**As an employer, the Trust is committed to providing emergency planning procedures to support establishments in the event of a critical incident.**

Refer to OEAP NG document: “[Off Site Visit Emergencies: The Employer's Role](#)”

To activate support from the Trust contact immediately the listed on the Emergency Contacts sheet at [www.satrust.com/trips](http://www.satrust.com/trips)

These telephone numbers should be carried by leaders at all times during an off-site activity but should only be used in the case of a genuine emergency. The contact details for the academy EVC should under normal circumstances be the first point of contact. Under no circumstances should these numbers be given to young people or to their parents or guardians.

## 7. Monitoring

As an employer, the Trust ensures that there is sample monitoring of the visits and LOTC activities undertaken by its academies, either by attaching such monitoring duties to its officers, or by delegating these tasks to academies. Such monitoring should be in keeping with the recommendations of National Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the establishment EVC. However, from time to time The Spencer Academies Trust will monitor selected activities.

Refer to OEAP NG document: “[Monitoring](#)”

## 8. Assessment of Leader Competence

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the Trust policy that all Spencer leaders and their assistants have been formally assessed as competent, the academy EVC to undertake such responsibilities as they have been assigned in line with the LOTC guidance - see also 3.3 in this policy document.

Refer to OEAP NG document: "[Assessment of Activity and Visit Leader Competence](#)"

## 9. Role-specific Requirements and Recommendations

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within The Spencer Academies Trust management structures. These are:

1. CEO of The Spencer Academies Trust
2. Principal of individual academies
3. Outdoor Education Adviser/Consultant
4. Visit or Activity Leader
5. Assistant Visit leader
6. Volunteer Adult Helper
7. Those in a position of Parental Authority

Refer to individual OEAP NG documents headed as above.

## 10. Charges for Off-site Activities and Visits

The Trust Principals, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to OEAP NG document: "[Charging for school activities](#)", and academies individual charging and remission policies.

## 11. Safeguarding

*All adults involved in any offsite visit or activity are required to work within the appropriate sections of the academy safeguarding and child protection policy.*

The Trust employees who work frequently or intensively with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process.

For the purposes of this guidance:

- frequently is defined as "once a week or more";
- intensively is defined as 4 days or more in a month or overnight.

However, it must be clearly understood that a DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that an overview based on a common-sense risk-benefit assessment process has been considered.

Refer to OEAP NG document: "[Vetting and DBS Checks](#)", and contact the Trust HR department for further support.

## 12. Requirement to Ensure Effective Supervision

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is "effective".

Effective supervision should be determined by proper consideration of:

- age, aptitude, experience (including the developmental age) of the group
- gender issues
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc.)
- availability of prompt outside assistance
- nature and location of the activity including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions
- staff experience and competence
- communication between sub groups

Nursery and Early Years should apply, Department for Education current guidance for staffing ratios.

Refer to OEAP NG document: "[Ratios and Effective Supervision](#)"

Refer to OEAP NG document: "[Group Management and Supervision](#)"

## 13. Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third-party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Academy policy and/or consultation with the EVC should clarify the circumstances where a preliminary visit is a requirement.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

***Examples of such schemes include:***

- The LOTC Quality Badge
- AALS licensing
- Adventuremark
- Association of Heads of Outdoor Education Centres (AHOEC) Gold Badge
- National Governing Body (NGB) centre approval schemes (applicable where the provision is a single, specialist activity).

**The Trust takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances regarding risk assessments.**

**Establishments should ensure however that leaders complete a risk benefit assessment and record any significant findings for any aspects of a visit which they are leading or responsible. This will usually include transport to and from the venue plus any stops of visits en route.**

Refer to: OEAP NG document "[Using external providers and facilities](#)"

## 14. Insurance for Off-site Activities and Visits

Employer's Liability Insurance is a statutory requirement and the Trust holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. The Trust also holds Public Liability insurance, indemnifying it against all claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities such as off-site activities and visits organised by all academies and settings for which the employer is responsible.

Some level of Personal Accident Insurance is provided for all Spencer employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit/ Activity Leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

The Trust Visit and Activity leaders can contact [kylielewis@satrust.com](mailto:kylielewis@satrust.com) to view the insurance coverage documents.

to seek clarification of the above, including risks included, the level of cover for certain injury/loss and any circumstances requiring early notification of specialist activities by the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Cover for Winter activities can be included but will require an additional premium-contact academy finance staff

The Spencer Academies Trust CFO:

Refer to OEAP NG document: "[Insurance](#)"

## 15. Inclusion

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every reasonable effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Academies should take all reasonably practicable measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in establishment policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Employers, Principals, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Disability Discrimination Act 1995, it is unlawful to:

- (a) treat a disabled young person less favourably;
- (b) fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

Refer to OEAP NG document: "[Inclusion](#)"

## 16. Adventure Activities Licensing Regulations

Employers, Principals/Managers, EVCs and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA), initially responsible to the DoE. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

The intention of the regulations is to provide a regulatory framework to protect children, parents, teachers and schools when using providers of defined adventurous activities in closely defined environments. The regulations and supporting inspection regime provide a formal process of professional inspection to accredit that providers have effective safety management systems and processes, meeting a national standard.

The definitive source of advice on the Licensing Regulations is to be found in the Health and Safety Executive publication: "[Guidance to the Licensing Authority on Adventure Activity Licensing Regulations 1996](#)"

Leaders should be aware that the AALS license is an assurance of safety. It does not accredit educational or activity quality. Leaders should also be aware of the Government's intention to repeal the Activity Centres (Young Persons' Safety) Act 1995 in England in 2012.

Refer to NG document: "[Adventure Activity Licensing Regulations](#)"

## 17. Good Practice Requirements

To be deemed competent, a Spencer Visit / Activity Leader, or Assistant Leader must be able to demonstrate the ability to operate to the current standards of recognized good practice for that role.

All staff and helpers must be competent to carry out their defined roles and responsibilities.

OEAP National Guidance sets a clear standard to which the Trust leaders must work. The guidance states:

**"a competent Visit /Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:**

- Knowledge and understanding of the Trust employer's guidance supported by relevant training. The Trust will provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training, while an academy can provide additional 'in-house' training.
- Knowledge and understanding of academy procedures supported by a structured induction process specified by the academy.
- Knowledge and understanding of the group, the staff, the activity and the venue.
- Appropriate experience
- In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification."

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. Academies should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies. EVCs should scan these and upload them to Exeant. For help with this please contact the Trust nominated officer.

Where a Volunteer Helper is a parent (or otherwise in a close relationship to of a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment.

Refer to OEAP NG document: "[Good Practice Basics](#)"

## 18 Value for Money

Academies have a responsibility to ensure that value for money is secured in the procurement of educational visits.

## 19. Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and establishments must follow the specialist guidance provided. All national and local regulatory requirements must be followed.

The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

The Visit Leader should ensure that coaches and buses are hired from a reputable company. Consideration should be given to questioning potential transport suppliers on whether:

- the driver(s) to be used will hold a valid and current DBS clearance;
- seat belts will be provided on the vehicle to be used, not all large passenger vehicles have a legal requirement to have seat belts fitted and those that do may only have lap belts (as opposed to 3-point belts) which are only suitable for short journeys;
- they are able to supply (where required) child seats and booster cushions for younger children, otherwise these will need to be supplied by the organiser;
- they possess a valid and recent risk assessment for 'school day trips/outings'

for further information or advice concerning any of the above, contact Trust

Transport manager.

Transporting young people in private cars requires careful consideration and must only take place in extenuating circumstances. Where this occurs, there should be recorded procedures. Young people should not be allowed to drive other young people to LOtC activities or on educational visits.

Refer to OEAP NG document: "[Transport - general considerations](#)"

Refer to OEAP NG document: "[Transport in minibuses](#)"

Refer to OEAP NG document: "[Transport in Private Cars](#)"

## 20. Planning

Planning should reflect the consideration of legal and good practice requirements, ensuring:

- The plan is based on academy procedures and employer guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

## Section 4 – Logistical arrangements

### Approval for Off-Site Visits or Activities

Competence generally exists in academies to make sensible judgements and give **Formal Approval** for most types of visit or activity.

Individual Spencer academies may give **Formal Approval** for all types of visit or activity **EXCEPT** those detailed below:

- Trips Abroad
- Trips involving water-based activities
- Those which could be reasonably classified as “extreme”
- Residential visits

The Trust C.E.O **must** approve these types of visit or activity and they **must not** go ahead without it. Visits under these headings are approved by the academy Principal in the normal way under their Policy arrangements and submitted to the Trust C.E.O for their additional Formal Approval using Exeant a minimum of 4 weeks prior

#### Please note:

- All visits and activities that take children beyond the academy premises require recorded **Formal Approval**.
- The academy’s Visits link Policy must detail who in the academy may give Formal Approval for visits or activities.
- All Formal Approval must be via Exeant at [satrust.exeant.co.uk](mailto:satrust.exeant.co.uk)
- Academies may approve all types of visit and activity delegated to them. These include all visits and activities not requiring the Trust approval (as detailed above)
- Where the Trust approval must be given, the Trust must be notified via Exeant at least **4 weeks** prior to departure. *(Where a late opportunity arises, the Trust will endeavour to deal with it as quickly as possible)*
- Where adventure activities that would normally be licensable by AALA are organised by the academy, the Visit Leader and any staff taking direct leadership responsibility for a group must have all relevant qualifications registered on Exeant to indicate that they are an Approved Leader for that activity at the level of engagement.
- Any licensable (AALA) activity provided by another organisation where payment of fees, charges or expenses is made must be covered by a current AALA licence

## Section 5 - Approval Flowchart

**NB: The Trust staff in all academies leading education off-site must have FORMAL APPROVAL for the activity to take place.**

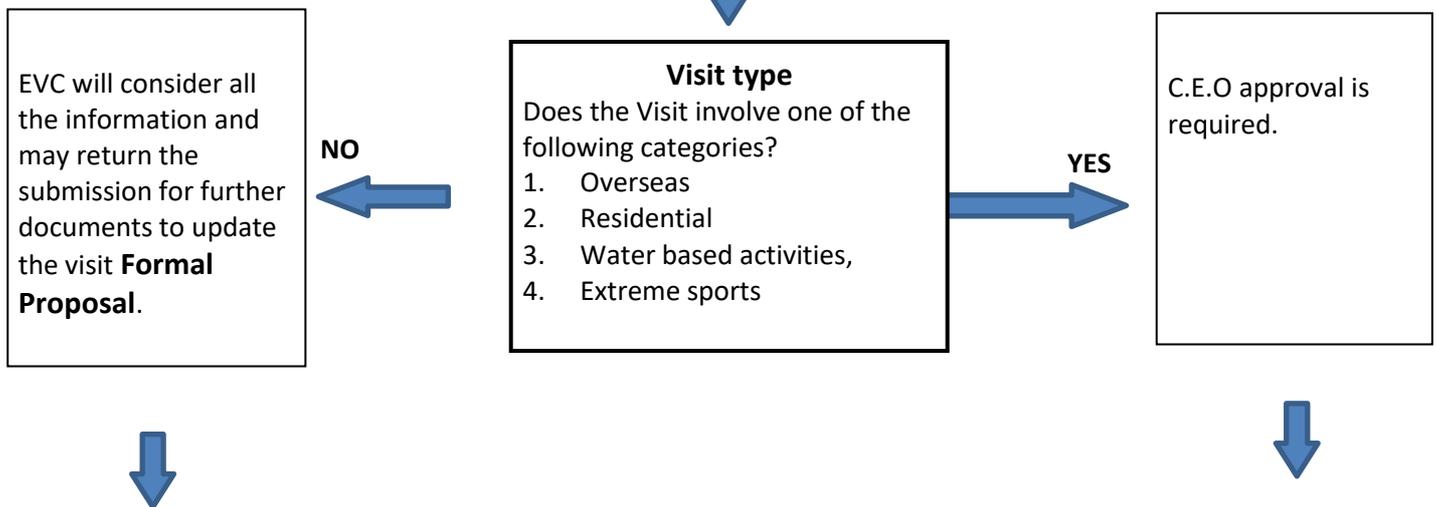
### Stage 1: INITIAL APPROVAL

Forward your visit proposal according to academy policy, with justification to academy Headteacher via email for **Initial Approval**.

### Stage 2: FORMAL PROPOSAL

On receiving **Initial Approval** from the Headteacher, the Trip Leader can begin to complete the necessary visit form on Exeant at <http://satrust.exeant.co.uk>

Visit Leader prepares the visit **Formal Proposal** and uploads all necessary information to Exeant. All planning details of the visit need to be included i.e. appropriate risk assessments, parental letters, financial information, itinerary, etc.



### Stage 3: FORMAL APPROVAL

Through the Exeant process a number of staff will consider the submitted visit form to ensure it is within guidance outlined in the academy policy and the Trust policy. Visit Leaders will receive **Formal Approval** for the visit only using the Exeant process.

Following consideration of all the information CEO or the EVC will authorise **Formal Approval**.

Visit Leader receives **Formal Approval**. The visit leader must ensure that all necessary academy offsite visit procedures are followed and **MUST** complete an evaluation after the activity/visit.

#### **Please note: FORMAL APPROVAL**

*This must **not** be assumed, but clear, documented and unequivocal, which will be by the use of Exeant database only.*

## Section 6 - Risk Management and Risk Assessment

The risk assessment and risk management process are at the heart of effective planning, preparation and delivery. It is not, and never has been, an additional activity. It is essential, core and informs all planning decisions and ongoing monitoring of the planned activities.

### Definitions

**Aim:** To make sure no one gets hurt or becomes ill and no one is exposed to any unnecessary dangers.

**Process:** To examine what could cause harm and judge if precautions make the activity acceptable.

**Risk Assessments:** Risk assessment is a careful examination of everything that could cause people to suffer injury or ill health or cause loss or damage to their personal property or that of a third party or adversely impact on the environment. It is based on professional judgements – sensible decisions based on knowledge, experience, training and an integral part of the planning process.

**Generic:** Apply to an activity when and wherever it takes place *e.g. Transportation*

**Site Specific:** Specific to an individual location

**Event Specific:** Its purpose is to draw together all the risk assessment information connected with the planned visit/activity. It will be specific to the particular group of participants at a particular time *e.g. named children on a particular day*. It may combine several risk assessments to cover the planned programme. These may have been generic but become Event Specific when deemed appropriate or amended by the Visit Leader for this particular visit/activity.

**On-going:** Judgements made as an activity progresses to take account of changing circumstances. This is an essential and vital part of the risk control mechanism.

**Hazards:** Anything that may cause harm. Risk assessments should focus on hazards which present significant risks.

**Control Measures:** Actions that reduce the likelihood and/or severity of an accident.

- Supervising adults must fully understand the control measures and what they must do
- Involve young people in the process as much as possible

### Written Risk

**Assessment:** This is a formal record of hazards that present a significant risk. It should **clearly** identify the extent and nature of the hazard, explain how the threat can be appropriately managed to enable the activity to continue safely or note that the circumstance should be avoided altogether (a “no go” statement).

### Risk Management:

- identify who needs to know how the risk will be managed
- ensure they understand the risk control measures
- ensure lines of communication are open and understood
- ensure the process is:
  - Simple
  - Proportional/practical
  - Suitable and sufficient
  - Recorded
  - Reviewed

### Availability of Risk Assessments

As a systematic way of identifying risks and a critical part of the health & safety management process, written risk assessments should:

1. Be written in a format that is clear and comprehensible
2. Be available for use in discussions with the young people involved in the planned visit
3. Be used for briefing visit leaders and supervisors
4. Be available to all interested parties including parents, leaders and supervisors, school staff, young people, Trust management, and others.
5. Be taken, where practical, on extended visits (such as residential visits) as an aide-memoire, source of information, part of the on-going risk assessment process and to support effective briefing and preparation of participants and others.

Visit Leaders must identify the most significant risks and ensure all involved in the off-site visit are aware of them as well as the control measures in place to deal with those risks (with due regard to the age, ability and any other factors relating to the participants).

**Providers and centres** should be expected to have their own activity and site-specific risk assessments available for all interested parties before a visit takes place.

### Generic Activity and Site-Specific Risk Assessments

A generic risk assessment for a particular activity e.g. orienteering will identify all the common hazards and suitable controls for that activity. **However**, in different venues the hazards and controls may vary and these can be identified in Site Specific risk assessments. Further assessment will be required in order to meet the needs of specific people involved, time of year etc. This additional information will be identified in an Event Specific risk assessment or by amending the generic activity and/or site-specific assessment.

Generic risk assessments should be used as required and tailored to ensure they are relevant to planned activities. Care must be taken with all generic risk assessments, since they remain generic until they have been carefully applied and adapted as necessary to meet the needs of the people involved in the particular visit or activity. For copies of these risk assessments see [www.satrust.com/trips](http://www.satrust.com/trips)

## Other Sources of Risk Assessments

Individual records of Site-Specific Risk Assessments carried out by your academy staff may also be used, however you must remember that these again will be generic until they have been declared suitable or amended by the Visit Leader for the particular event.

Site Specific Risk Assessments carried out by other academies/establishments (probably within the Trust) may also be useful as reference BUT not used as a substitute. These must also be amended or deemed appropriate for your visit by your Visit Leader.

## Using a provider's risk assessments

When an academy is using a centre or provider, the provider is responsible for the risk assessment of their provision - e.g. their facilities and activities. It is the responsibility of the Visit Leader to check the provider is deemed competent to manage these risks, which may be evidenced by a competence award (e.g., LOTC QB or AALA award). If the provider does not hold such a relevant award then they **MUST** complete a Provider Statement, which should be attached to the visit form. You are NOT required to attach the provider's individual risk assessments. But they may be included in the record keeping process for information purposes by attaching to the visit form logged in the Trust Exeant system. Any such documents should be clearly labelled as for **information purposes** only and are not risk assessments carried out by Visit Leaders.

The academy must risk assess all the elements of the visit they are responsible for (e.g. care and supervision of their own pupils as required) and attach risk assessment records to the visit form. In order to do this, the academy may need to refer to some of the provider's risk assessments (e.g. those of a domestic nature). The academy is, of course, also responsible for risk assessing any aspects of the visit which are self-organised including travel to and from the venue.

## Producing a record of a Risk Assessment

All activities must be fully risk assessed and a record kept of significant hazards and associated control measures. All relevant risk assessments that are produced for a trip/visit must be uploaded into the Exeant process as part of the submission of a formal proposal.

There is no single correct format for a record of a risk assessment. There are a variety of formats, all of which can be effective. However, a suitable and sufficient risk assessment and a record of the significant findings are absolutely essential elements in planning all visits and activities. It is a requirement under health & safety legislation to record all significant risks, indicate how they are to be controlled and who should know about them. Always start with the templates available on Exeant data base

In some cases, individual risk assessments will need to be carried out for children, young people and supporting adults with particular or special needs.

The process of completing a risk assessment should start with a review of the generic risk assessment of the activity and any available site-specific risk assessment. Using the information within those assessments, which are in reality pre-assessments, begin an Event Specific risk assessment

Event Specific risk assessments should address all the significant risks relevant to the particular event including needs of specific individuals, levels of supervision etc. It is useful to think through the visit from start to finish, identifying all the hazards that present a significant risk.

As part of the process of completing an Event Specific risk assessment it is important to plan for a situation where it may be necessary to adopt an alternative plan or plans (i.e. a Plan B or even Plan C).

A full risk assessment for Plan B or Plan C will require that you go through the steps above so that as with to an alternative activity can be made simply and easily, for example a situation where the weather conditions deteriorate or there is an unexpected road or venue closure etc. Where risk assessments for Plan B or Plan C are prepared the same process of consultation and risk assessment availability should be assured.

The Event Specific risk assessment should consider the event specific emergency plan and contacts. Each establishment should have a generic emergency/critical incident plan and contacts: details must be taken on every visit.

### **Remember**

- ✓ Give sufficient time for consideration, approval and distribution according to the Trust Policy and Operational Procedure and academy/establishment policy. Planning and carrying out and recording risk assessments cannot be left to the last minute.
- ✓ **Risk Assessments must be current.** Electronic tags are always attached to documents and therefore it is important that documents attached are reviewed, signed and dated. The review information from previous similar activities must be taken into account. Record any new information and ensure the appropriate people receive the record.
- ✓ The post visit review should include any advice or observation relating to the preparations and inclusion of future risk assessment.

## Section 7 - Visit or Activity Leader Responsibilities

The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer. However, employees are required to take reasonable care and to cooperate with their employer. It is critical that employees understand “who is my employer” (Refer to “Basic Essentials MUSTread – Remit and Rationale”) and understand their employer’s policy and guidance.

The Visit Leader has the overall responsibility for supervision and conduct of the visit. To ensure accountability and to avoid potential confusion, a single Visit Leader should be appointed. If this role changes during a visit, a clear handover should be made.

The key requirements for Visit Leaders are that they must be accountable, and competent and confident to lead the visit/activity, not that they hold a particular post, title or job description.

Being **accountable** means that the Leader has been engaged through an appropriate recruitment process, which includes vetting and induction into the establishment’s policies and procedures. The details of this process may depend upon whether the Leader is employed, contracted or acts as a volunteer, but in all cases should be thorough.

Being **competent** means that the Leader has demonstrated the ability to operate to recognised standards of good practice, and has sufficient relevant experience and knowledge of the group, the activity and the venue. There are several ways of demonstrating competence. These include:

- Providing evidence of holding relevant qualifications, including any specific qualification required by the law, the employer or the establishment (e.g. in First Aid).
- Providing evidence of having undertaken appropriate training. Visit Leaders and their deputies are strongly recommended to undertake any Visit Leader training provided by their employer, and should be aware that some employers make this a requirement.
- Providing verified evidence of relevant experience.

Where a Leader wishes to lead an adventure activity, their competence should be confirmed by a robust verification process, such as:

- Holding a National Governing Body leadership/coaching award at an appropriate level.
- Being "signed off" by a suitably qualified Technical Adviser appointed by the employer.

For further information about appropriate technical qualifications, to lead or advise on specific adventure activities, see the qualifications matrices produced by the Adventure Activities Licensing Authority (AALA) in AALA guidance note 5.18 available at:

<http://webcommunities.hse.gov.uk/connect.ti/adventureactivitiesnetwork/view?objectId=544293> Being

**confident** means, not only being fully aware of their abilities, but also of their limitations.

If you are designated as the Visit Leader, you should:

- Liaise with your establishment’s Educational Visits Co-ordinator (EVC) and ensure that your respective roles are clear.
- Be formally approved to carry out the visit.
- Be specifically competent.
- Plan and prepare for the visit, taking a lead on risk management. It is good practice to involve all staff in the planning and risk management process to ensure wider understanding. It is also good practice to involve young people in these processes wherever appropriate.
- Define the roles and responsibilities of other staff (and young people) to ensure effective supervision, appointing a deputy wherever possible.

- If the staff team includes someone with a close relationship to a member of the group, ensure there are adequate safeguards so that this will not compromise group management.
- Ensure that child protection issues are addressed (e.g. good safeguarding practice is followed and all are appropriately vetted and checked.)
- Provide relevant information to supporting staff, including about the nature and location of the visit and about the participants (age, health information, capabilities, special needs, safeguarding and behavioural issues)
- Ensure that informed parental consent has been obtained as necessary.
- Provide relevant information to parents and young people, and arrange pre-visit information meetings where appropriate.
- Make sure there is access to first aid at an appropriate level.
- Ensure the activity/visit is effectively supervised.
- Ensure that all staff and any third-party providers have access to emergency contact and emergency procedure details.
- Evaluate all aspects of the visit, both during and after the event.
- Report any accidents, incidents or near misses.

When working with third-party activity providers it is imperative to avoid 'grey areas', so there should be a clear handover before and after any activity led by a provider. Should a provider run an activity in a way that causes concern, the accompanying staff should consider stopping the activity at the first appropriate moment. Such an intervention should be done with sensitivity and discretion to ensure that it does not result in young people being put at greater risk.

# Sample risk assessments

## 1. Farm visit

ACTIVITY	<b>1. Local petting farm visit- Example only this must also accompany.</b> This must be read, adapted and applied in conjunction with the activity risk assessments
HAZARDS	<ul style="list-style-type: none"> <li>X Communication issues between VL and academy/parents</li> <li>X Road traffic accidents</li> <li>X Slips/trips/falls/strains etc.</li> <li>X Visit Leader incapacitated</li> <li>X Unfamiliar locations</li> <li>X Objects falling from height</li> <li>X Equipment failure</li> <li>X <del>Cold related conditions (hypothermia, frostbite)</del></li> <li>X Heat related conditions (sunburn, dehydration, heat exhaustion, heat stroke)</li> <li>X Other adverse weather-related conditions e.g. lightening, strong/gusting winds etc.</li> <li>X Getting lost/separated from group</li> <li>X <del>Unplanned/inappropriate entry into water/drowning</del></li> <li>X Burns, fire/smoke injuries</li> <li>X <del>Substance abuse, alcohol, drugs</del></li> <li>X Transmissible infections, diseases, illness stings/bites etc.</li> <li>X Adverse contact with wild, farm or domestic animals/plants: kicks, trampling, bites, stings</li> <li>X Abuse/inappropriate contact with strangers</li> <li>X Manual handling issues</li> <li>X Inappropriate behavior</li> <li>X <b>Pregnancy - seek trust advise/ individual risk assessment</b></li> </ul> <p>Explanation of crossed out hazards - Within the above sections I have crossed out</p> <ul style="list-style-type: none"> <li>▪ cold related conditions due to the time of year of the trip as it will be a warm sunny day.</li> <li>▪ Unplanned entry into water. There are no bodies of water at the farm this includes ponds and lakes – make sure you double check this as part of your pre-visit.</li> <li>▪ Substance abuse alcohol – this is very unlikely as it’s a farm in the middle of nowhere and the age group of the children it would be very unlikely any of them would have access to this so it is not relevant.</li> </ul> <p>Tips for carrying out risk assessment.</p> <ul style="list-style-type: none"> <li>▪ Carry out a site visit where possible- this will make completing the RA much easier.</li> <li>▪ Strike through what does not apply- there is no need to give the reason why you have crossed it out unless you feel it necessary</li> <li>▪ Highlight ONLY what you have added- DO NOT highlight what is already written in the template – this makes it much easier to differentiate what you have added and will make it easier for the EVC/ Principal and anyone reviewing the document.</li> <li>▪ If you are visiting a local farm you will need to complete and upload</li> </ul>

- Farm risk assessment includes supervision
- Transport RA – Example on document portal
- 1-1 risk assessment for pupils where required
- Itinerary
- Pupil list including any medical needs
- Parental consent confirmation and copy of letter
- Proof of insurance – of the farm or activity provider
- Provider statement if no quality badge held – information on this can be found on the oep.ng website.

**CONTROL MEASURES**

- Academy Emergency contact details:
- Name:
- Mobile No 1 \_\_074157 952618 Head Principal Sarah Mason\_\_
- Landline No 1 \_\_0115 9170 100\_\_ School office
- Name:
- Mobile No 2 \_\_07385 681925\_\_
- Landline No 2 \_\_01332 787456\_\_
- Named staff who is responsible for ensuring First Aid provision \_\_Mellissa Barber, Sarah cook and James Repton\_\_
- Named staff who will remain at visit location in an emergency \_\_Visit leader –Alice Merney \_\_deputy VL – James repton\_\_
- Communication's between staff and back to school or base. 24/7 contact to be available- Visit leader will have school trips phone – all contact will be made on this phone. Deputy visit to have phone and numbers shared prior to the trip
- Appropriate and approved leadership, briefing, supervision and supervision ratio. Meeting afterschool to discuss planning of trip and risk assessment shared with deputy VL and teachers. Briefing on day of trip before departure to run through itinerary. Itinerary shared will all staff and volunteers on the trip.
- ~~Adventure activity leadership in line with Adventure Activity Matrix-~~
- Ability, qualification and previous experience of accompanying staff -All staff are trained and qualified to run the trip
- Availability of prepared Plan B – If Visit leader is incapacitated then the deputy VL Alice Merney will take over the trip.
- Infection, disease or illness protection and management procedures- medical information for pupils to ensure there are no known allergies to animals and all staff and children briefed before entering the farm. All staff and children to wash hands before and after entering animal enclosures. Children will bring a packed and sit in the designated picnic area. Children will wash hands before and after eating lunch. Any children who present ill on the trip – parents will be informed and the child taken back to school where appropriate.
- All equipment checked and fit for purpose -First aid kits have been checked before departure and are held by Mellissa and Sarah there is also first provision at the farm. Any pupil requiring first aid will be relayed to the main office to complete meditracker or be written into the school accident book and parents informed where appropriate.
- Seasonal issues/daylight considered – the trip will depart and return during the hours of daylight
- Weather forecast/underfoot conditions/surface water conditions/depth and speed of water/tidal implications considered/impact of weather on activity e.g. strong winds – ~~woodland activities, cycling-~~ Weather forecast is monitored during the days before the trip for any extremes in weather. If weather has been forecast to be hot 24c and above we will take extra precautions in the form of additional water. Parents will be advised to send children with plenty to drink sun cream on the morning and provide additional cream in their bags, sun hats are required and suitable loose-fitting clothing. There are shaded areas at the farm where children can escape the sun. if the weather has been deemed extreme by the met office then the principal will seek to cancel the trip.
- ~~Near water apply controls described in “Safety at Water Margins” (Appendix N) and any other appropriate measures~~
- ~~Swimming ability and water confidence identified if activity is in, on or near to water~~
- Relevant local knowledge pre-trip visit completed by visit leader to check the site and familiarise the site
- ~~Previous experience, age, ability, fitness of young people~~
- ~~Warm up activities, as appropriate~~
- Arrangements for pupils with special needs, medical conditions or requiring particular attention – There are 2 children who require 1-1 support see additional risk assessment attached. 2 pupils require medication at lunch time this will be Held by Mellissa barber and witnessed by Sarah cook this will be recorded and saved in the medicines folder once back at school
- Staff to pupil ratio, defined groups and regular head counts children will be in groups of 7 with 2 members of staff for each group in addition to the pupils who require 1-1. There will also be 7 parent helpers on

the trip. The parent helpers will not be alone with any pupils during the visit. Parent helpers have been briefed and are aware of procedures on the day.

- Appropriate personal protective equipment available to pupils and staff – staff advised to apply sun cream wear a hat and drink plenty of water
- Emergency procedures in place and equipment carried/available - All staff on the trip are aware of the emergency contact details
- Fire safety procedures in place – staff are made aware of the fire evacuation assembly point on arrival at the farm by Mellissa Barber.
- Application of strategies to prevent cold related conditions (hypothermia/frostbite)
- Application of strategies to prevent heat/sun related conditions (sunburn/dehydration/heat exhaustion/heat stroke) plenty to drink – sun cream- hats and suitable clothing and footwear – trainers or wellies Staff to take extra water bottles available from the school kitchen.
- Appropriate rests for re-hydration/food/shade/shelter/application of sunscreen etc. Staff, pupils and parents advised to take plenty of water, there will be scheduled breaks to ensure fluids are kept up.
- Use of eye protection against sun damage staff parents and pupils advised to bring sunglasses and hats where available
- Sight and Hearing correction equipment of students and staff being lost or damaged-spare glasses /batteries/equipment and security of equipment. - 2 first aid kits and first aid provision available on site
- Highway Code, Country Code, appropriate activity specific codes – all trip participants advised not to touch anything unless given permission to do so and to place any rubbish in the bins provided or put in bags until home.
- Appropriate safeguarding processes in place- school safeguarding policy and procedures followed at all times

## NOTES

- Accidents to young people, including several fatalities, highlight the need for great care in or near water – refer to Safety at Water Margins.
- Each excursion must be risk assessed on an individual basis and not to rely on “last year’s” details. Recent accidents have occurred to parties led by staff that have run incident free activities for many years.
- It is good practice to involve young people both in the risk assessment process and in the safety precautions to be followed

Risk Assessment carried out by: \_\_\_\_\_ Date: \_\_\_\_\_

## 2 Museum / Castle

ACTIVITY	1. Core Risk Assessment – Museum/Castle or similar
HAZARDS	<ul style="list-style-type: none"> <li>X Communication issues between VL and academy/parents</li> <li>X Road traffic accidents</li> <li>X Slips/trips/falls/strains etc.</li> <li>X Visit Leader incapacitated</li> <li>X Unfamiliar locations</li> <li>X Objects falling from height</li> <li>X Equipment failure</li> <li>X Cold related conditions (hypothermia, frostbite)</li> <li>X <del>Heat related conditions (sunburn, dehydration, heat exhaustion, heat stroke)</del></li> <li>X Other adverse weather-related conditions e.g. lightening, strong/gusting winds etc.</li> <li>X Getting lost/separated from group</li> <li>X <del>Unplanned/inappropriate entry into water/drowning</del></li> <li>X Burns, fire/smoke injuries</li> <li>X <del>Substance abuse, alcohol, drugs</del></li> <li>X Transmissible infections, diseases, illness stings/bites etc.</li> <li>X Adverse contact with wild, farm or domestic animals/plants: kicks, trampling, bites, stings</li> <li>X Abuse/inappropriate contact with strangers</li> <li>X <del>Manual handling issues</del></li> <li>X Inappropriate behaviour</li> </ul>
<b>CONTROL MEASURES</b>	

- Academy Emergency contact details:
- Name: \_\_\_\_\_
- Mobile No 1 \_\_\_\_\_ Principals number \_\_\_\_\_ 07415 697324 \_\_\_\_\_
- Landline No 1 \_\_\_\_\_ principals' number \_\_\_\_\_ 0115 9170100 \_\_\_\_\_
- Name: \_\_\_\_\_
- Mobile No 2 \_\_\_\_\_ Vice principal 07836 459789 \_\_\_\_\_
- Landline No 2 \_\_\_\_\_ school office 0115 9389784 \_\_\_\_\_
- Named staff who is responsible for ensuring First Aid provision \_\_\_\_\_ Sarah Morgan, Steve Tones, Nicola Kempton \_\_\_\_\_
- Named staff who will remain at visit location in an emergency \_\_\_\_\_ Sarah Morgan and Steve Tones \_\_\_\_\_
- Communications between staff and back to school or base. 24/7 contact to be available Sarah Morgan VL will have school trip phone and number shared with all staff on the trip who will have their own phones for emergencies
- Slips Trips and Falls – During pre-site visit there are areas that are uneven and also a number of stairs, staff and students will be advised on suitable solid footwear – No sandals. Staff will check footwear upon arrival to school. All staff and students will follow instruction from castle/museum staff
- Fire – the museum/castle has a clearly marked assembly point and clearly sign posted fire exits- if a fire alarm sounds pupils will follow their group leader out of the nearest exit. Please also state to pupils where the fire assembly point is.
- Appropriate and approved leadership, briefing, supervision and supervision ratio. Pupils will be supervised in a ratio of 7 students to 1 member of staff. There are no students who require 1-1 or additional support
- Contact with animals- there are no farm animals on the site, the site is open to the public who may be walking dogs, children are advised not to stroke or pet any animals at any time.
- Inappropriate behavior- Pupils have been briefed on behavior expectations in line with school behavior policy and any pupils not following school rules will be j
- ~~Adventure activity leadership in line with Adventure Activity Matrix~~
- Ability, qualification and previous experience of accompanying staff – All staff have completed VL training
- Availability of prepared Plan B – in the event of bad weather the trip will be cancelled, if the visit leader cannot attend Steve Tones will take charge as deputy VL
- Infection, disease or illness protection and management procedures if any student becomes ill on the trip they will be taken back to school via taxi or school minibus accompanied by a member of staff or collected by parent where possible. In the event of an emergency an ambulance will be called.
- All equipment checked and fit for purpose First aid kits to be checked before departure by Sarah Morgan
- Seasonal issues/daylight considered- trip taking place during normal daylight hours
- Weather forecast/underfoot conditions/surface water conditions/depth and speed of water/tidal implications considered/impact of weather on activity e.g. strong winds – woodland activities, cycling- weather forecast checked day before and if deemed dangerous – high winds, snow /ice then the trip will be cancelled by the principal
- ~~Near water apply controls described in “Safety at Water Margins” (Appendix N) and any other appropriate measures~~
- ~~Swimming ability and water confidence identified if activity is in, on or near to water~~
- Relevant local knowledge Visit leader Sarah Morgan and Steve Tones have completed a pre-site visit and know the area well
- Previous experience, age, ability, fitness of young people
- ~~Warm up activities, as appropriate~~
- Arrangements for pupils with special needs, medical conditions or requiring particular attention- There is 1 pupil Aiden Brent who is asthmatic Sarah Morgan will check Aiden has his inhaler in his bag and first aider Nicola Kempton will carry his spare- this will be returned back to the first aid cupboard at the end of the trip.
- Staff to pupil ratio, defined groups and regular head counts All staff attending the trip will headcount their groups of 7 before and after entering areas of the museum/ castle – change as appropriate

- Appropriate personal protective equipment available to pupils and staff – staff and pupils briefed before trip on suitable clothing- it will be a cold day so hats scarves and gloves and a suitable winter coat as some areas of the castle/ museum will not be heated.
- Fire safety procedures in place -Staff aware of fire exits and fire assembly points – checked on pre-visit by Sarah Morgan.
- Application of strategies to prevent cold related conditions (hypothermia/frostbite) as above hats scarves gloves/ winter coats and long-sleeved tops and trousers (school uniform will be worn).
- ~~Application of strategies to prevent heat/sun related conditions (sunburn/dehydration/heat exhaustion/heat stroke)~~
- Appropriate rests for re-hydration/food/shade/shelter/~~application of sunscreen etc.~~ There are 3 scheduled breaks for food and drink. Staff will ensure all students have a packed lunch. Staff will also have a packed lunch.
- ~~Use of eye protection against sun damage~~
- ~~Sight and Hearing correction equipment of students and staff being lost or damaged-spare glasses /batteries/equipment and security of equipment.~~
- ~~Highway Code, Country Code, appropriate activity specific codes~~
- Appropriate safeguarding processes in place All pupils will be supervised, the area is open to the public however staff will be vigilant at all times and any concerns will be raised with castle/ museum staff. All staff have received level 2 safeguarding.

Include any relevant additional information here. Any info on medicines any 1-1 any additional activities such as play parks if used- how will they be supervised- if there is a play park which is also open to the public it is recommended this is not used.

Any other additional info to be added below and anything crossed out that does not apply.

## NOTES

- Accidents to young people, including several fatalities, highlight the need for great care in or near water – refer to Safety at Water Margins.
- Each excursion must be risk assessed on an individual basis and not to rely on “last year’s” details. Recent accidents have occurred to parties led by staff that have run incident free activities for many years.
- It is good practice to involve young people both in the risk assessment process and in the safety precautions to be followed Consider if age appropriate

Risk Assessment carried out by: Steve Tones \_\_\_\_\_ Date: \_\_4/12/21\_\_\_\_\_

### 3. Residential Visits – Tented accommodation

<b>ACTIVITY</b>	<p style="text-align: center;"><b>3. Residential Visit Tented Accommodation</b></p> <p style="text-align: center;">Walesby Forest Residential 15/7/22 – 17/7/22</p>
<b>HAZARDS</b>	<ul style="list-style-type: none"> <li>X Fire</li> <li>X Building/grounds fabric</li> <li>X Electricity and electrical appliances</li> <li>X Catering</li> <li>X Child protection</li> <li>X Lost students</li> <li>X Cold related conditions overnight</li> </ul>
<b>CONTROL MEASURES</b>	
<p style="text-align: center;"><b>The accommodation for the group is a tented campsite.</b></p> <p style="text-align: center;"><i>This must be used, adapted and applied in conjunction with Risk Assessment No.1 and any appropriate site-specific RA</i></p> <ul style="list-style-type: none"> <li>→ Use/consideration of provider’s domestic site-specific risk assessment, where appropriate. Taken consideration of the site’s general risk assessment see attached sheet. Staff are made aware of responsibility for supervision of children / groups.</li> <li>→ Check accommodation has a fire risk assessment (<del>Abroad – ensure it meets the appropriate national standards and assess safety before using.</del>) Accommodation is risk assessed against fire and combustible materials</li> <li>→ Staff inspection of fire precautions on arrival. Adam Belton Visit leader to conduct visual check upon arrival and between groups of accommodation and site to ensure fire precautions are being observed.</li> <li>→ Briefing of students on emergency procedures (if possible a fire practice should be held on the first day) On arrival, children will be made aware of site safety and emergency precautions and briefed by both School staff (VL) and entre staff.</li> <li>→ <del>Visual inspections of stairways, balconies, bath/shower facilities, furniture, electrical sockets etc. (preferably on a pre-visit inspection and again on arrival and record/report to travel agent rep/hotel as appropriate)</del></li> <li>→ Group has exclusive use of the sleeping accommodation (preferred) or at least all group rooms are adjacent or in the same area of the accommodation. Where this is not possible there must be suitable deployment of staff to provide appropriate supervision in accommodation close to the students. The group have an area that is exclusively for their use. There will be no public access to the site for the duration of our visit. However, staff will be vigilant at all times as Walesby is a large area.</li> <li>→ All staff accommodation, including Visit Leader, to be adjacent to students, unless remote or indirect supervision has been agreed by the Principal/EVC Tents erected in a horseshoe shape with all staff tents to be at the top of the shape and children will be shown where the tent locations are on the site briefing.</li> <li>→ Group accommodation is segregated by gender unless accommodation prevents this (e.g. single room Mountain Hut) Boys and girls will be segregated. Staff will monitor attendance in tents during any down time and at lights out / when children are going to sleep. Adam Busman visit leader will ensure this is carried out</li> <li>→ <del>Student rooms can be locked if necessary but staff can always gain access</del></li> <li>→ All accompanying staff and volunteers must have valid DBS clearance. Staff and volunteers attending the trip have had full safeguarding training and all staff hold valid enhanced DBS. This has been checked prior to departure and in line with trust policy. Parent volunteer has completed SAT risk assessment whilst awaiting documentation to proceed with enhanced DBS check – Whilst on the visit, safeguarding procedures have been discussed with the parent. They will not be allocated any</li> </ul>	

groups to work with and is there to solely support 1:1 with their child. Throughout the visit, a member of staff will supervise / accompany them. Night time arrangements – Parent will have their own individual tent and staff are on a Rota to be awake throughout the night should any children require support. Parent is aware and understands that should a pupil seek assistance from her, she is to direct them to a member of staff. *\*Parent has completed ihasco safeguarding level 2 training and keeping children safe in education training.*

- Student rooms cannot be accessed from outside (ground floor windows, balconies with fire exits etc.) Tented accommodation - Students will be located in groups of 6 in tented accommodation. The site will be in a horseshoe so all tents are facing each other. Children will be checked on through
- Pupils know where staff will be throughout the night – Upon arrival, pupils will be shown staff tents and where staff will be if outside. This will be reiterated before lights out.
- Pupils are checked into rooms at “lights out” Visit leader Adam Busman will check tents at lights out. He will then periodically check on tents until all children are asleep. Staff will be on a rota to be awake over the course of the night to carry out regular tent checks and support children requiring assistance and to provide supervision of the parent volunteer (sleeping in their own tent).

#### Wednesday / Thursday

Adam Busman 21:30 - 00:00

Richard Bibbon 00:00 - 1:30

Ella Timmons 1:30 - 3:00

Chris Brent 3:00 - 4:30

Will Foster 4:30 - 6:00

#### Thursday / Friday

Adam Busman 21:30 - 00:00

Ella Timons 00:00 - 1:30

Chris Brent 1:30 - 3:00

Will Foster 3:00 - 4:30

Richard Bibbon 4:30 - 6:00

- Children requiring additional night time support identified on the Excel document – Visit leader to have the Excel checklist and will ensure that actions identified e.g. night time nappies / medication have been actioned. *Deputy Visit Leader will carry out this role if VL is incapacitated.*
- Administration of medicines prior to bed time / throughout the visit – Gemma Wallis (medication and first aid trained) will oversee the correct administration of all medicine for all children Chris Brent will witness any medication administration. See timeline on Excel document. This will be used alongside meditracker. Second member of staff will sign to confirm correct administration of medicine given. Alarm will be set to notify Alison Anderson for time to give medication. Paperwork from meditracker to be printed off and kept securely in case of loss of internet signal. If Gemma Wallis becomes incapacitated, staff with medical training will be on standby (Jenifer Jones, Chris Brent, and Will Foster)
- Sight and Hearing correction equipment of students and staff being lost or damaged-spare glasses /batteries/equipment and security of equipment. Students with hearing aids and glasses will keep these in secure cases – Parents have been advised of this.
- Catering staff have food hygiene qualifications – Centre staff delivering catering all hold food hygiene qualifications – observed in the catering hall and will be checked on arrival.
- Students are not involved in catering or washing up unless the activity has been specifically risk assessed and is properly supervised/managed/training given (e.g. D of E Expedition training) **All catering is completed by centre staff.**
- Students should be carefully briefed about boundaries for down time and timings/ locations of meetings. Pupils’ time will be carefully managed by the itinerary shown in appendix on Exeant. Children will be briefed on boundaries on entry to the site and at the beginning of any activity/down time/ indirect supervision.
- “Signing out” and “signing in” system is in place and used – Register of all children and adults to be handed to reception on entry and exit of the site. This will be monitored throughout the stay.

→ Regular meetings for “head counts” should be held. Head counts to be conducted at regular intervals. Children will be aware of their key adult (Groups of 12 children). Head counts to be conducted at start and end of each activity. Before and after meal times. First thing in the morning and final thing at night.

#### NOTES

- It is good practice for younger students to wear easily identifiable clothing, badges or hats.
- Students **should not** wear any badge identifying them by name.
- Students should know details of their destination and of academy contacts. It would be good practice for younger students to carry written details of these.
- Accidents have occurred as a result of misuse of hotel balconies. Balconies also present possible unauthorised entry and exit points for pupils and /or unwelcome visitors.

Risk Assessment carried out by: Adam Busman Date: 31/10/22

#### 4. Transport of children and young people involved in educational visits (Trip to petting farm)

ACTIVITY	4. Transport of children and young people involved in educational visits (Trip to petting farm)
HAZARDS	<ul style="list-style-type: none"> <li>X Delay, cancellation or breakdown</li> <li>X Accident, illness or travel sickness</li> <li>X Missing young person</li> <li>X Lack of knowledge of meeting place, contingency plans</li> <li>X <del>Transport systems overseas may well not be subject to the same standards normally deployed within the UK</del></li> <li>X Coach is not roadworthy upon arrival</li> </ul>
<b>CONTROL MEASURES</b>	
<ul style="list-style-type: none"> <li>→ Emergency procedures/contacts in place</li> <li>→ Contingency plans for delays/cancellations/breakdowns – Alice Merney - check with coach company what their breakdown procedure will be, will they provide another coach in the event of a breakdown</li> <li>→ Use of Visit Leader Emergency Card and Pupil ID Card- Alice Merney leader and staff have trip phone and all contact numbers have been shared. Contact details have been shared with coach driver.</li> <li>→ Effective communication systems (where appropriate, ensure coverage of mobile network/identify available landline access/use of radios) – all contact details have been shared</li> <li>→ Appropriate supervision and head counts/register as required- headcount will be carried out by Alice Merney on and off the coach</li> <li>→ Plan for appropriate comfort stops – the journey is 45 minutes so there is no need for any planned stops</li> <li>→ Particular arrangements for supervision at service stations, railway stations, departure lounge/terminal areas etc.</li> <li>→ Young people to know their Visit Leader and Sub-Visit Leader Pupils will be briefed before the trip departs and made aware of who their group leader is.</li> <li>→ Young people briefed regarding purpose, expectations, appropriate behavior, timings, supervision- Pupils will be briefed before the trip departs and made aware of who their group leader is and the expectations regarding behavior.</li> <li>→ Use of small groups/buddy systems etc. Children will be in 4 groups of 7 with 2 members of staff per group.</li> <li>→ Young people to be brief on what to do if separated from the group -Pupils will be briefed on staying with their group. Pupils advised on meeting point if they do become separated – main entrance to farm park</li> <li>→ Appropriate sites for getting on and off transport coach will pick up outside school reception and drop off in designated coach area at farm park</li> <li>→ Consider use of identifiable clothing etc. (no name badges) pupils will wear school uniform</li> <li>→ Prepare route or site-specific risk assessment where appropriate Alice Merney has completed pre-site visit</li> <li>→ Use of block booked seating on planes, trains etc.</li> <li>→ Procedure/equipment for biohazard cleaning etc. Alice Merney will have santiser and sick bags, wipes in the event any pupils become ill on the coach.</li> <li>→ All arrangements agreed with contractor Alice Merney to introduce themselves to the coach driver and give basic info regarding the trip details including confirming arrival and departure time</li> <li>→ Access to funds to deal with transport arrangement failure Coach company will provide return transport in the event of a breakdown</li> </ul>	

- Staff to be deployed throughout seating arrangement to provide appropriate supervision and meet current regulations (especially coaches, planes, trains) - Staff will be staggered throughout the coach near the emergency exits
- Use of seatbelts to be monitored and enforced by staff in addition to any responsibility by carrier – Alice Merney has read Trust transport policy and will follow guidance within this policy, regarding coaches and seatbelts and the requirements
- ~~When planning journeys abroad, ensure that all participants and parents are briefed as far as possible regarding arrangements and practices that may be encountered~~
- Coach is not roadworthy upon arrival: Visit leader to do a roadworthy check on the bus before departure. Walk around the bus and check everything looks safe. If not, the children will not get on the bus and we will ring the bus company and ask for another bus. Headteacher to support with this. Basic roadworthy checks include in line with guidance documents 4.5e and 4.5f the following – Does the bus look clean and well cared for? Does the coach driver look alert- introduce yourself and ensure driver is fully aware of route destination and timings? Check emergency exits are clear and not obscured this includes windows doors and roof hatch.

## NOTES

### On foot

- ~~A route specific risk assessment to be carried out, identifying specific location hazards, e.g. junctions/crossings etc.~~
- ~~On public roads/service stations etc. determine crocodile or wave method to cross roads, agree and brief all participants regarding responsibilities at crossings and other hazardous locations~~
- ~~On public footpaths/bridleways/parks etc. brief all participants relating to other users e.g. walkers, cyclists, horse riders, dog walkers and apply appropriate codes or practice e.g. Country Code etc.~~

### Hired coach/~~bus/taxi~~

- Coach hired from employer approved company/reputable firm/correct license/appropriate DBS arrangements for drivers and escorts. Schools must follow OEAP guidance document 4.5e and 4.5f This is not an example control measure
- All arrangements to be agreed with contractor. EVC Administrator has arranged coach and details of trip.
- Coaches to be fitted with seatbelts – having cross referenced the SAT transport policy and checked the requirements coach is fitted with seatbelts.
- Buses without seatbelts not to be hired for sole use (scheduled service buses acceptable without seatbelts) urban journeys only not rural areas.
- ~~Motorway/AutoRoute breakdown procedures~~

### Public Service Buses

- ~~Clear briefing on behaviour and supervision arrangements to all adults, pupils and young people~~
- ~~Arrangements in the event of whole group being unable to board bus~~

- Arrangements for ensuring all participants alight at the correct at the correct stop/head counts etc.
- Strict supervision at all bus stops

#### **Minibus**

- Driver appropriately licensed
- Appropriate safety checks carried out
- Determine additional supervision, other than driver, by risk assessment
- Luggage appropriately and securely stored on roof rack or inside, clear of aisles
- Any trailer does not impede emergency exit
- Additionally, EEC regulations for foreign travel complied with
- Motorway breakdown procedure issues

#### **Private vehicles**

- Driver to complete 'Registration of Private Vehicle Form' – see Appendix F (page 59) **Only to be used in an emergency**
- Parental permission obtained specifically for private vehicles
- Booster seats used as appropriate

#### **Trains/Underground rail systems**

- Strict supervision on platforms
- Avoid rush hours whenever possible
- Organise advanced ticket purchase, where possible
- Ensure sole use of sleeping compartments

#### **Ferry crossings**

- Strict supervision between vehicle deck and designated meeting point
- Meeting point to be staffed throughout the journey
- Pupils not allowed on open deck unless supervised
- Strict briefing/supervision relating to duty free purchases/alcohol from bars

#### **Flights**

- Young people/adults briefed on security expectations
- Strict briefing/supervision re: passport control/customs/baggage reclaim area
- Appropriate supervision and ground rules for waiting areas

#### **Other forms of transport**

- Trams/cable cars/smaller water craft etc. may have individual requirements and additional arrangements and a specific risk assessment should be carried out to determine any specific requirements

Risk Assessment carried out by: Alice Merney Date: 28-11-2022