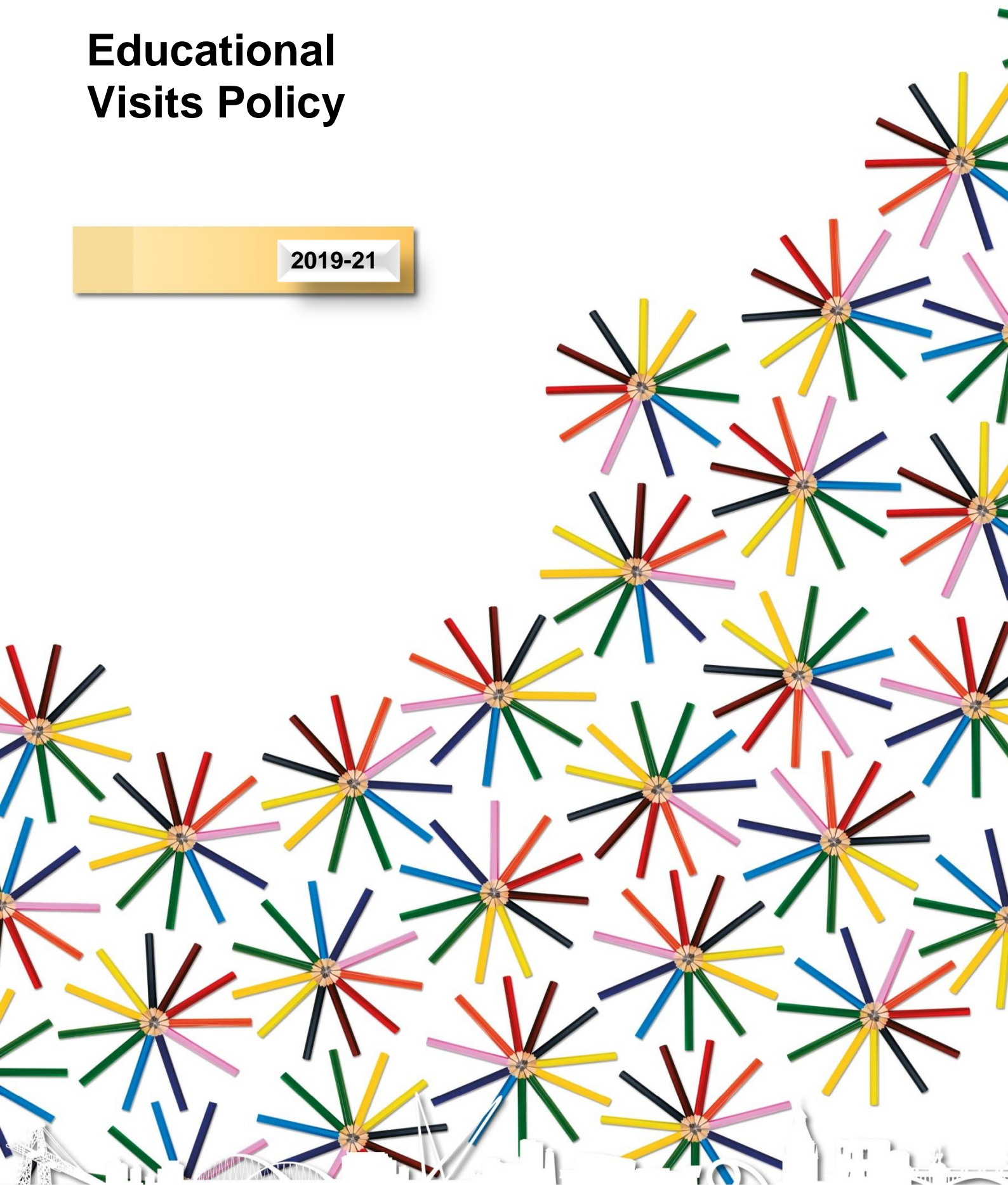


# Educational Visits Policy

2019-21



**Newport City Council - Education Service**  
**Educational Visits Policy**

This document sets out the Newport City Council policy and contains the standard planning and approval forms for educational visits.

Further guidance is available on the Welsh Government website which provides the [following link](#) to the Outdoor Education Advisers Panel National Guidance (OEAPNG) which has replaced the All Wales guidance for educational visits.

Employers and employees who organise educational visits and outdoor learning have a duty under the Health and Safety at Work Act 1974, and other health and safety legislation, to ensure sensible risk management procedures are in place for the planning and organisation of these activities.

The Outdoor Education Advisers Panel National Guidance (OEAPNG) for educational visits sets out framework and good practice guidelines by which employers and employees can demonstrate that they fulfil these requirements.

## Contents

1. Foreword by Sarah Morgan, Chief Education Officer
2. Introduction
3. When is local authority approval required?
  - Table 1: Definition of demanding environments
  - Table 2: Adventure activities
4. Leader competence and typical staff: young person ratios
5. Transport / travel
6. Processes for gaining approval
  - Internal approval
  - Blanket approval
  - Local Authority (LA) leader approval
  - Arranging LA approval/notification: visits other than Duke of Edinburgh's award expedition groups
  - Arranging LA approval: Duke of Edinburgh's award expedition groups
  - Overseas expeditions organised through an independent provider
  - Local authority approval decisions
  - Record keeping
  - Monitoring
  - Review
7. Voluntary Aided schools – governing body approval
8. Record keeping
9. Appendices
  - Table 1: Definition of demanding environments
  - Table 2: Adventure activities
  - Template 1: Parent / Carer consent: routine off-site visits consent form)
  - Template 2a: Parent / Carer consent form for one-off or occasional visits
  - Template 2b: Parent / Carer information letter for one-off or occasional visits
  - Template 3: Blank risk management form.
  - Template 4: Visit planning checklist
  - Template 5: Independent provider questionnaire
  - Template 6: Checklist for young people going on a visit
  - Template 7: Summary of participants on a visit
  - Template 8: Exchange visits: Host family contact details
  - Template 9: Visit leader emergency action flowchart
  - Template 10: Base contact: flowchart - dealing with an emergency call
  - Template 11: Incident form
  - Template 12: Sample generic risk assessment for you to adapt

**Template forms****Note for educational visits coordinators:**

The template forms in this section are provided for schools/ centres to adopt or adapt. Some of them may be irrelevant in your school/ centre- if so they can be removed from the list below.

*COPIES OF ALL TEMPLATES ARE INCLUDED IN THE APPENDICES AT THE END OF THIS POLICY DOCUMENT*

## 1. Foreword

Staff who organise and engage in educational visits with children and young people show dedication, commitment and enthusiasm. Your work ensures that the young people of Newport will continue to be given the opportunity to take part in such activities. These policies and procedures are aimed at supporting you in this valuable work.

Educational visits offer an invaluable opportunity to enrich young people's learning, raise their self-esteem, increase their motivation and appetite for learning, and raise levels of achievement in many aspects of their life and education.

Learning out of the classroom is a strong theme that runs through all stages of education in Wales. Newport's educational establishments and children's services have a well-established and continuing commitment, to offering an exciting and enjoyable range of educational visits for our young people.

It is important that children are progressively exposed to carefully managed risks, without being exposed to significant dangers. Educational visits can range in scope from a short local excursion to a park or museum, to cultural or historical venues and encompass a wide variety of outdoor, adventurous and residential activities.

These invaluable educational experiences enhance the curriculum, help develop good working relationships between staff and young people, give opportunities to experience challenging new activities and help young people to develop important life skills.

This document sets out the planning and approval procedures, which will help staff, plan and deliver high quality and safe off site visits. By adopting these nationally agreed procedures, staff will be following best practice and in doing so will be supported by the local authority should an accident occur.

I would like to take this opportunity to thank you for your professionalism and dedication.

Sarah Morgan  
Chief Education Officer  
September 2019

## 2. Introduction

This document sets out the procedures by which Newport City Council and its educational establishments meet the standards set out in the Outdoor Education Advisers Panel National Guidance (OEAPNG), which has replaced the All Wales Guidance for Educational Visits

Children and young people benefit greatly from the diversity of experiences and learning opportunities which are derived from educational visits and out-of-school activities and events.

Schools are responsible for ensuring that all events and activities which take place away from the school premises are planned and carried out safely.

Each school should also ensure that a suitable and appropriately trained educational visits co-ordinator takes responsibility for the educational visits programme within the school.

The following policy is issued to support schools in planning and managing educational visits so that they reflect best practice and comply with the national guidance.

This policy has been produced through the collaborative work of a small group of headteachers and senior managers from Newport schools. The local authority is very grateful for the work which has been undertaken to achieve this.

Queries relating to all procedures in relation to this policy should be directed to:

David Evans  
Outdoor Education Adviser  
Telephone: 07870 300944  
Email: [Outdooradviser@aol.com](mailto:Outdooradviser@aol.com)

Nicholas Lo Turco  
Education Service  
Civic Centre  
Newport  
South Wales  
NP20 4UR  
Tel: 01633 210595  
Email: [Nicholas.loturco@newport.gov.uk](mailto:Nicholas.loturco@newport.gov.uk)

### **Important note for educational visits co-ordinators:**

You should remove any sections that are not relevant. For example, you may wish to remove the section on overseas expeditions organised through an independent provider if you are a primary school. You should add further sections, as required, to meet the needs of your establishment and the range of visits that take place.

### 3. When is local authority approval required?

Local authority approval is only needed for the following trips / visits:

- Visits to or including demanding environments – **see table 1 overleaf**
- Residential trips / overnight trips (national guidance states that for residential visits all staff / volunteers must be DBS checked)
- Visits abroad
- Visits including adventurous activities (including onsite activities) – **see table 2 overleaf**

**Please note:** All visits requiring local authority approval must be entered on the EVOLVE system and submitted for LA approval at least 28 days prior to the visit taking place. Visits which require LA approval but which are arranged at short notice should be submitted as soon as practicable and with an explanation for its late submission.

Visits which do not require LA approval should be added to EVOLVE in time for adequate scrutiny to take place and must be approved by the headteacher before they take place.

Newport City Council recommends the use of EVOLVE for all visits undertaken by schools, except the most local (walking). This is good practice and is a valuable tool in ensuring that a robust and verifiable system is in place for all schools.

If you do not have access to the EVOLVE system or require training please contact David Evans or Nicholas Lo Turco

**Table 1: Definition of demanding environments**

**Important note:** Classification of locations is subjective. Visit leaders who are unsure of whether or not a location requires local authority (LA) approval can seek clarification from their educational visits coordinator, who should consult the outdoor education adviser for technical advice.

Location	Definition	Level of approval required
<b>Normal countryside</b>	<p>Areas;</p> <ul style="list-style-type: none"> <li>• which are close to vehicle access (i.e. less than 30 minutes walking time for any group member to the nearest road from which the group could be evacuated by vehicle) <b>and</b></li> <li>• where the environment does not have any of the features of a 'demanding environment' listed below.</li> </ul>	LA approval <b>not</b> required
<b>Demanding environments</b>	<p>Areas where there is significant risk to the group from <b>one or more</b> of the following factors;</p> <ul style="list-style-type: none"> <li>• hazardous terrain (e.g. cliffs, very steep slopes etc.);</li> <li>• remoteness (i.e. more than 30 minutes walking time from the nearest normal vehicle access point from which the group could be evacuated);</li> <li>• difficult escape (i.e. places where the group could be trapped and/or where they would need specialist help to escape);</li> <li>• exposure to severe weather (i.e. open to the weather and no easily accessible shelter within 30 minutes walking time for any of the group);</li> <li>• open areas without clear boundaries where the group might stray into hazardous or remote terrain in poor visibility;</li> <li>• fast flowing water, deep water, or water with strong currents (including tidal flow) <b>where:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> the group will be close to the water <b>and</b> there is a significant risk of someone falling in;</li> <li><input type="checkbox"/> the group will be entering the water.</li> </ul> </li> </ul>	LA approval required
<b>Residential visits</b>	All residential / overnight visits	LA approval required
<b>Overseas visits</b>	Without exception	LA approval required



**Table 2: Adventure activities**

**Important note:** This list is not exhaustive. If you are unsure whether or not an activity is classified as an adventure activity you should seek the advice of your educational visits coordinator.

Land based activities	Level of approval required
Rock climbing/abseiling including climbing walls	LA approval required
Mountaineering	LA approval required
Hill walking	LA approval required
Ice climbing	LA approval required
Gorge or coastal scrambling/sea cliff traversing/coasteering	LA approval required
Underground exploration – cave or mine	LA approval required
Skiing (snow/dry slope) * <b>See note below regarding wearing helmets</b>	LA approval required
Air activities (except commercial flights)	LA approval required
Horse riding and pony trekking	LA approval required
High ropes courses / Trampoline parks	LA approval required
Quad biking/ATV's	LA approval required
Orienteering	LA approval required where activity takes place in a demanding environment
Mountain biking	LA approval required where activity takes place in a demanding environment
Trampoline parks.	LA approval required. Visits to these facilities will not be approved if participants are required to sign a waiver. See separate LA advice document if you are unsure
Water based activities	Level of approval required
Kayaking and canoeing	LA approval required
Sailing and windsurfing	LA approval required
White water rafting	LA approval required
Waterskiing	LA approval required
Snorkel and aqualung diving	LA approval required
All forms of boating (excluding commercial transport)	LA approval required
Improvised rafting	LA approval required
Kite surfing	LA approval required
Surfing and body boarding	LA approval required
Dragon boating	LA approval required
Wave skiing	LA approval required
Jet skiing/personal water craft	LA approval required
Any activity ( <b>including camping, fieldwork and non-adventure activities</b> ) taking place in demanding environments as defined in Table 2 above	LA approval required

\* Snowsports Wales (and indeed all snow sport organisations in the UK) strongly supports the statement from the FIS (International Body) that “the use of helmets is recommended for all alpine skiers and snowboarders regardless of skiing ability and age” **It is LA policy that all learners must wear helmets for skiing /snowboarding.**

#### 4. Leader competence and typical staff to young-person ratios

##### **General off-site visits**

1. The staff to young-person ratio ranges outlined in this section are intended only as a starting point for visit leaders when planning their visit. They are not intended for professional outdoor activity providers.

Actual ratios for any visit must be determined through a process of risk assessment by the visit leader or other competent staff member. The head teacher / educational visits coordinator should enquire if numbers fall significantly outside these ranges.

2. Competent leaders will recognise when the number of young people per leader should be reduced. For example, if group members have particular behavioural or physical needs or if weather conditions are not favourable on the day. They can also recognise when they can be safely increased. If the visit leader deems it safe to exceed the number of young people per leader given in the table below, this decision should be agreed with the head teacher / educational visits coordinator.
3. Where leaders operate alone, the group should be trained or briefed on the action to take in the event of leader incapacitation. An assistant leader, able to look after the group and raise the alarm, should be present if the group would be at significant risk were the leader is incapacitated.

<b>General off-site visits</b>			
Leadership awards for specific adventure activities should be discussed with the Outdoor Education Adviser			
<b>Activity</b>	<b>Age of young people</b>	<b>Staff: young person ratios-typical range</b> NB actual ratios must be determined by a process of risk assessment – see notes 1 and 2 above	<b>Leader competence</b>
Local visits and visits to normal countryside (as defined in table 1)	Nursery	1: 2-4	Previous experience and approved by Head/EVC
	Reception / Year 0	1: 4-6	
	Years 1-3	1: 6-10	
	Years 4-6	1: 10-15	
	Year 7 onwards	1: 15-20	
	Special education	1: 6-10	
Residential visits and visits abroad	Years 4-6	1:8-10	As above
	Year 7 onwards	1: 10-15 (but 1:10 with 2 staff minimum for visits abroad)	
	Special education	1: 5-8 (but 2 staff minimum for visits abroad)	
Swimming in public pools (with lifeguard)	Years 1-3	1: 5-8	As above
	Years 4-6	1: 10-12	
	Year 7 onwards	1: 15-20	
Swimming elsewhere (without lifeguard)	All years	1: 5-10 (but 2 staff minimum)	As above & lifeguard qualification

4. In normal circumstances at least 50 per cent of the adult numbers should be employees of the school/ centre, e.g. teachers, youth leaders or learning support assistants. The balance of adult numbers will normally be made up of volunteers (parents, governors) approved by the head teacher educational visits coordinator.

## 5. Travel

There are several methods of transport used when transporting pupils to and from educational trips / visits. Some of which are covered by legislation / regulations and some of which are covered by guidance written to protect all persons involved (see table below for details).

Mode of transport	Driver	Regulations / Guidance
Hired coach	Coach company	<p>Visit leaders must ensure that a reputable coach company is used and additional checks may need to be carried out to verify this</p> <p>If any member of the group uses a wheelchair, the visit leader should ensure the company can provide a vehicle appropriate which has access and securing facilities.</p> <p><b>NB:</b> All coaches first registered after 1 October 2001 must be fitted with seat belts and, since September 2006, it is a requirement that all passengers must wear the seat belt if one is fitted. If the vehicle is older there is no legal requirement for it to have seat belts and therefore no legal requirement to wear them.</p>
Hired mini bus – self drive	Teacher	<p>The visit leader should check that the driver has valid driving licence (see section on ‘mini bus licence requirements’ below) and that the insurance is appropriate for the journey.</p> <p>Taking mini buses abroad will require a full PCV licence and additional insurance. A forward facing seat with a seat belt must be provided for each child travelling.</p>
School mini bus		<p>Regular maintenance checks must be carried out and a detailed record kept.</p>
Private vehicle – car	Teacher Parent	<p>A valid driving licence, insurance certificate (including business cover for school staff) and MOT must be submitted to the school for approval. It is the legal responsibility of the driver to ensure their passenger’s safety.</p>
Private vehicle – taxi	Taxi driver	<p>The visit leader should only use approved / registered licenced taxi companies and should check that the company used has the appropriate insurance.</p>

## Minibus Driver – Licence requirements

There are specific rules surrounding the licence needed when driving a mini bus as detailed in the All Wales Guidance (see table below)

Licence gained before 1 January 1997	<p>Staff may drive a minibus without a D1 passenger carrying vehicle (PCV).</p> <p><i>It is good practice for drivers to be trained in a non-PCV course to ensure they meet the standard of driving competency expected by the LEA</i></p>
Licence gained after 1 January 1997	<p>Only if <b>all</b> of the following are met then a PCV licence is not required.</p> <p>The driver must:</p> <ul style="list-style-type: none"><li>- be 21 years old or over;</li><li>- have held a driving licence for at least two years;</li><li>- be trained in a non-PCV course</li><li>- not attach a trailer</li><li>- not drive outside the UK</li><li>- be driving in a voluntary capacity (i.e. they receive no payment and it does not form part of their job description)</li><li>- ensure that the vehicle does not exceed the maximum weight (3.5 tonnes)</li><li>- only use the mini bus for educational purposes</li></ul> <p><b>If one or more of the above are not met the driver must hold a full D1 PCV licence</b></p>

## **6. Processes for gaining approval**

### **Internal approval – all visits**

Visit leaders should seek approval from their educational visits coordinator for any off-site visit.

Routine visits may be given blanket approval by the educational visits coordinator on a termly, annual or other periodic basis (see below).

It is recommended good practice that all but the most local walking visits should be recorded on EVOLVE to support school processes.

One-off or occasional visits or visits that require local authority approval or notification require educational visits coordinator approval for each visit (unless blanket local authority approval has been given).

Visit leaders should submit details of the trip via the EVOLVE system well in advance of the visit start date. (28 days minimum for visits which require LA approval, as soon as practicable for visits which require headteacher approval). **Please contact the local authority if you need access to the EVOLVE system.**

In order to comply with national guidance, Voluntary Aided schools would need to ensure that the trip has been recorded in the minutes and approved by the governors - see section 7.

### **Blanket approval**

Blanket approval may be given by:

- headteachers / educational visits coordinator for routine visits that do not require local authority approval
- the local authority for those staff who have gained local authority leader approval (see below).

Even where blanket approval has been given it is recommended that all but the most local (walking) visits are recorded on EVOLVE. All visits must be approved by the Head teacher / LA (as appropriate) before they take place

### **Local authority leader approval**

#### **Who needs local authority leader approval?**

Local authority (LA) or school employees who wish to lead (instruct) in any of the demanding environments or activities for which local authority approval is required must first be confirmed as technically competent to lead by the outdoor education adviser.

Those seeking local authority leader approval must complete the relevant section on EVOLVE and submit for endorsement by the educational visits coordinator / head teacher. The completed form is then sent to the outdoor education adviser for LA approval.

Depending on depth of experience and technical skill, leaders may be given written approval to lead either:

- the activity/activities at specific, named venue(s) at any time for the duration of the approval period; or:
- the activity/activities at all venues that are within the remit of their competence at any time for the duration of the approval period.

#### **Local authority approval will be given if the following conditions are met:**

- The head teacher / educational visits coordinator supports the employee LA leader approval application and verifies that the employee is generally competent (other than technical

- competence) to manage a group of young people involved in this type of activity;
- There is evidence of appropriate induction and personal experience of the activity;

**Plus, for activities that fall under the remit of a National Governing Body leadership award, the leader must hold either:**

- The relevant National Governing Body (NGB) leadership award );

**Or:**

- A written and signed statement of competence by an appropriate technical adviser verifying that the leader has the relevant technical and group management skills in the activity.

To arrange technical adviser approval the educational visits coordinator must identify an appropriate technical adviser who is willing to make a signed statement of competence for the visit leader.

Technical adviser approval is normally given only if the following conditions are met:

- The leader has completed a training course in the relevant NGB leadership award where one exists (or has undergone other appropriate training)
- The technical adviser has made a practical assessment of the leader and can confirm that they are operating at the standard of the relevant NGB leadership award, or at a suitable level for a site-specific approval to be given.

Contact the Outdoor Education Adviser for advice on the appropriate level of technical adviser.

### **Visits that require local authority approval / notification, other than Duke of Edinburgh's Award expedition groups**

Following approval by the headteacher / educational visits coordinator, local authority approval or notification must be arranged by the educational visits coordinator for any visit that requires LA approval or notification (see Table 1 for details)

- Details entered onto EVOLVE
- any supporting documents to be uploaded as an attachment
- submitted at least 28 days before the expedition.

Visits requiring local authority approval must be submitted via EVOLVE and should be **at least 28 days before** the visit/visits.

### **Local authority approval: Duke of Edinburgh's Award expedition groups only**

Following approval by the Head/EVC, LA approval/notification must be arranged:

- details entered onto EVOLVE
- any supporting documents to be uploaded as an attachment
- submitted at least 28 days before the expedition.

### **Overseas expeditions organised through an independent provider**

Outline approval for the expedition must also be sought from the Outdoor Education Adviser before the booking is confirmed and at least 12 months in advance of the visit taking place.

(Following the same EVOLVE process as for other visits which require LA approval).

## **Local authority approval decisions**

Confirmation of approval decision will be sent to the educational visits coordinator via EVOLVE. Visits that require local authority approval must not proceed until this approval has been given.

All visit approval requests will normally be dealt with within one week of the request being received. Any visits which are not approved will be sent back, accompanied with a note or action which needs to be addressed before it can be approved.

Where further information is required or where elements of the national guidance have not been met, approval will be withheld until this is been provided. Confirmation of this decision will be sent to the educational visits coordinator / headteacher via the returned EVOLVE visit form.

Any disputes arising between the local authority and the school in respect of educational visits will be subject to arbitration by the Chief Education Officer or her representative.

## **7. Voluntary Aided schools**

Under health and safety legislation, employers are responsible for the health, safety and welfare at work of their employees. These responsibilities extend to children and young people in their care. This is set out in the national guidance.

In voluntary aided schools the governing body is the employer.

Voluntary aided schools are welcome to adopt and adhere to Newport City Council's Educational Visits Policy (and to use EVOLVE) but must ensure the following:

- that this policy is endorsed by the schools governing body
- that all visits requiring LA approval are endorsed and minuted by the governing body in order to comply with the All Wales guidance and health and safety legislation.

There will be no charge for voluntary aided schools to be part of the city wide process for monitoring and approval of educational visits.

## **8. Record keeping**

Schools/centres should retain and archive in the school/centre records a copy of their:

- Educational visits policy – dated so that the version, current at the time of any visit, can be traced;
- Standard risk management procedures dated as current at the time of the visit;
- Records of staff competence and training (perhaps as part of the appraisal/ performance management records).

This information should be kept for five years after which it may be destroyed.

If there has been an accident/incident on a visit, schools/centres must ensure that the local authority is notified according to their procedures and that it is sent a copy of the EVOLVE visit form along with the completed incident forms.

The local authority will keep accident/incident records until the young person reaches age 21 (or for 3 years in the case of an adult). Schools/centres therefore **do not** need to retain records of accidents/incidents reported to the local authority, unless they wish to do so for their own purposes.

If a visit leader or school/centre receives notification of a claim they should not respond directly but should pass the details to the local authority claims manager/insurance section.



## **Monitoring**

### **Internal monitoring by the head teacher / educational visits coordinator**

The head teacher / educational visits coordinator must monitor from time to time, for compliance with local authority guidance by visit leaders within the school/centre.

Monitoring should include:

- Scrutiny of standards of visit planning and organisation as part of the visit approval process;
- Occasional observation of visit leadership.

Following any observation of visit leadership it is good practice to provide the visit leader with verbal and written feedback and recommendations for further training if necessary. A copy of the observation report should be given to the visit leader and another copy kept on file by the school/centre.

## **Review**

Feedback from monitoring will be used to review procedures in order to ensure that they meet the standards expected for off-site visit organisation and leadership and to identify further training needs for visit leaders and educational visits coordinator.

## 9. Appendices

### TEMPLATE FORM 1

Parent/Carer consent routine off-site visits

**School/centre:**

---

**Your** \_\_\_\_\_ **child's** \_\_\_\_\_ **name:**

I hereby agree to my child participating in routine visits off the school/centre site. These visits might include the following, or similar, activities:

*E.g.* Sporting fixtures, local walks, library visits

These visits will normally take place at the following, or similar, locations:

*E.g.* Newport International Sports Village, libraries, local venues

**I understand that:**

- Such visits will normally take place within the school/centre normal hours, but, if occasionally, they are likely to extend beyond this, adequate advance notice will be given so that I may make appropriate arrangements for my child's return home;
- My specific permission will be sought for any visits beyond those listed above or which could involve commitment to extended journeys, times or expense;
- All reasonable care will be taken of my child during the visit;
- My child will be under an obligation to obey all directions given and to observe all rules and regulations governing the visit and will be subject to all normal school/centre discipline procedures during the visit;
- I must inform the school/centre of any medical or psychological condition or physical disabilities that may affect them during the visit;
- All young people are covered by the local authority's third party public liability insurance, in respect of any claim arising from an accident caused by a defect in the school premises or equipment, or attributable to negligence by the council or one of its employees. The school has arranged additional cover for personal accident and loss of personal belongings.

**Full name of parent/carers:** \_\_\_\_\_

**Signature**      **of**      **parent/carers:** \_\_\_\_\_ **Date:**

\_\_\_\_\_

**Address:**

---

\_\_\_\_\_

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

\_\_\_\_\_

## TEMPLATE FORM 2a

Parent/Carer consent for one-off or occasional educational visits

To be distributed with an information sheet/letter giving full details of the visit

**School/centre:** \_\_\_\_\_

—

**Visit/activity:** \_\_\_\_\_

**Venue:** \_\_\_\_\_ **Date(s):** \_\_\_\_\_

**Your child's name:** \_\_\_\_\_

**Form/Class (if relevant):** \_\_\_\_\_

### Medical and dietary information

- a) Does your child have any physical or psychological condition that may affect him/her during the visit?

YES / NO

If YES, please give details:

—

—

—

- b) Please give details of any allergies:

\_\_\_\_\_

\_\_\_\_\_

- c) Please give details of any special dietary requirements of your child:

\_\_\_\_\_

—

\_\_\_\_\_

—

- d) Please detail any recent illness or accident suffered by your child that staff should be aware of?

\_\_\_\_\_

—

\_\_\_\_\_

—

- e) Please list any type types of non-prescription medication or lotions your child **may not** be given:

---

---

---

f) To the best of your knowledge, has your son/daughter been in contact with any contagious or infectious diseases or suffered from anything in the last four weeks that may be contagious or infectious?

YES / NO

If YES, please give details:

---

---

---

g) When did your son/daughter last have a tetanus injection?

---

### Water confidence/swimming ability

Please indicate your child's swimming ability:

Cannot swim ☐

Able to swim a little in a swimming pool ☐

Able to swim confidently in a swimming pool ☐

Able to swim confidently outdoors (e.g. lake, river or sea) ☐

### Your contact details

Tel: (home): (work): (mobile):

---

Home address:

---

---

---

### Alternative emergency contact:

Name: Tel:

---

Address:

---

---

—

**Family doctor:**

Name: \_\_\_\_\_  
\_\_\_\_\_

Tel:

Address: \_\_\_\_\_  
\_\_\_\_\_

—

**Declaration**

- ☐ Having read the information about the visit, and having understood the level of supervision to be provided, I agree to my child taking part in the visit and activities described.
- ☐ I understand that all reasonable care will be taken of my child during the visit/activity and that he/she will be under an obligation to obey all directions and instructions given and observe all rules and regulations governing the visit/activity.
- ☐ I understand the code of conduct for the visit and the sanctions that may be used if my child breaks this code of conduct. I have discussed the code of conduct and sanctions with my child.  
**(This relates to school behaviour policy.)**
- ☐ I understand that if my child seriously misbehaves or is a cause of danger to him/herself or to others, then I may be asked to collect him/her or he/she may be brought home early from the visit/activity. In such a situation there will be no obligation on the school/centre to refund any money.
- ☐ In an emergency I agree to my son/daughter receiving medication and any emergency dental, medical or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present.
- ☐ I understand the extent and limitations of the insurance cover provided.

**Full name of parent or carer** (please print): \_\_\_\_\_

**SIGNED:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

## **TEMPLATE FORM 2b**

Parent/Carer information letter for one-off or occasional visits

Title of visit here

Dear Parent/Carer,

Re ..... (name of visit and dates)

Your son/daughter is included on a visit/journey/expedition to (name of venue)

where he/she will participate in the following activities (list of activities)

The group will leave from (location) at (time) am/pm on (date) and is expected to return to (location) by (time) am/pm on (date)

Travel will be by (coach/minibus/air etc.)

The member of staff in charge of the group is (name) and other accompanying staff are (names of all staff)

There will be a total of (number) children on the visit comprising (number) boys and (number) girls.

Destination address is (address)

Tel: (xxxxxxx) (emergency use only)

The estimated cost of the visit is (amount) which includes (list here all inclusions).  
It does not cover (list here all exclusions).

Payment may be made in the following ways (detail here arrangements, dates and cancellation/late payment penalties).

Insurance by the council covers all legal liability of the council to young people on the visit but does not provide personal accident cover where the council has no liability. As a result, additional personal accident cover is advisable / has been arranged (give full details).

A system of emergency contact has/will be arranged as follows (outline arrangements)

The code of conduct which your child will be required to follow is attached to this letter. Please discuss this with your child.

A meeting of all parents and participants will be held on (date) at (time) when clarification of any aspects of the visit will be available. In the meantime you are requested to complete and return the attached parental consent form.

### TEMPLATE FORM 3

Risk management form

Type of visit:

Significant hazards and harm which may occur	Who might be harmed?	Safety measures: <i>Measures that are in place and/or will be taken to reduce the risk to a tolerable level</i>

Additional notes:

Completed by .....  
Date .....  
Review date .....

## **TEMPLATE FORM 4**

### **Visit planning checklist**

This checklist is intended for use as an aide-memoire for the main elements of visit organisation. Schools/centres are encouraged to modify this list to suit their needs.

#### **Purpose of visit**

- ☐ What are the aims of the visit?

#### **Where and when do you intend to go?**

- ☐ Are venue, activities and time of year appropriate to aims and age/ability of group?
- ☐ Have you planned alternative activities (plan B) in case you need to abandon your planned programme for any reason?
- ☐ Does the visit involve the use of an independent provider?
- ☐ If yes, has this provider satisfactorily completed and returned the Independent Provider Questionnaire before you make any booking?
- ☐ Have you gained approval from your educational visit coordinator / head teacher / governors (and local authority, if required) prior to making any financial commitment?

#### **Risk management**

- ☐ Have you carried out an exploratory visit?
- ☐ What are the main hazards (including for any plan B)?
- ☐ Are the main hazards covered by the school/centre risk management procedures for this type of activity/visit?
- ☐ If there are additional hazards and safety measures above and beyond the risk management procedures, have you recorded these?
- ☐ Have you made other leaders and young people aware of hazards and safety measures?

#### **Overseas visits**

- ☐ Have you sought LA approval at least 28 days before the visit?

#### **Does your visit involve:**

- ☐ Adventure activities?
- ☐ Visits to demanding environments?

If so, have you gained local authority approval at least 28 days before the visit?

#### **Staffing**

- ☐ Are adequate staffing numbers available, taking into account any special needs?
- ☐ Have you checked the advice on typical young person: staff ratios in Annex 2 of the *All Wales guidance for Educational Visits*?
- ☐ Have other staff/helpers been briefed on their roles on the visit?
- ☐ If establishment staff are planning to lead activities which require LA approval, have they obtained LA leader approval?
- ☐ Are voluntary helpers being used? Are they appropriate? Are they insured, by being entered on the school/centre list of voluntary helpers? Are they aware of their responsibilities?
- ☐ Is a police check necessary for your helpers under the Child Protection Act?



## **Finance**

- ☐ Is a charge or voluntary contribution involved? If so, have you made sure that this conforms to the Education Reform Act charging regulations?
- ☐ Are you using a commercial operator or company? Is there financial security e.g. ABTA/ATOL?
- ☐ If relevant, does the visit conform to package travel regulations?

## **Insurance**

- ☐ Is personal insurance cover for young people/staff provided?
- ☐ Have you checked any cover automatically provided, for example by a tour company?
- ☐ Are parents aware of the level of insurance provided?

## **Parent/carers information and consent**

- ☐ Have you provided parents/carers with full information regarding the visit and all planned activities (including plan B activities) and levels of supervision?
- ☐ Have you met with parents/carers?
- ☐ Have they given appropriate written consent?
- ☐ Have you agreed a code of conduct for the visit with young people and parents/guardians?
- ☐ Are they aware of the consequences of any misbehaviour by their child?

## **Special needs**

- ☐ Have you taken account of any special needs of young people/staff?
- ☐ Have you made all staff (including independent providers) aware of these special needs if relevant?

## **Programme**

- ☐ Does your programme include alternatives (plan B) in case the original programme needs to be abandoned for any reason?
- ☐ Have you planned 'down-time' arrangements?
- ☐ Have you arranged adequate supervision at all times? Duty rota for staff?

## **Clothing and equipment**

- ☐ Are clothing and equipment appropriate to the activities and location?
- ☐ Have young people's essential clothing been checked?

## **Medical arrangements**

- ☐ Do you have a record of relevant medical information of all the young people and staff?
- ☐ Have you made appropriate medical arrangements, including first aid?
- ☐ Are there any special potential health hazards associated with the site?
- ☐ Are all staff involved aware of the above?

## **Accommodation**

- ☐ Suitability? Pre-visit check?
- ☐ Fire precautions and certification? Fire drill?
- ☐ Young people security?
- ☐ Exclusive use or shared? Compatibility of other groups if present?

**Transport**

- ☐ Driver suitability?
- ☐ Drivers' hours?
- ☐ LA minibuss regulations?
- ☐ Insurance?
- ☐ Adequate stops, eating and care arrangements en route?

**Visits overseas**

- ☐ Passports?
- ☐ Visas?
- ☐ Health/medical arrangements in place? (European Health Insurance Cards)
- ☐ Minibus regulations (Tachographs) license requirements (PCV License)
- ☐ Exchange visits: child protection procedures?
- ☐ Cultural issues?

**Emergency procedures, contacts and communication**

- ☐ Have you planned what to do in the event of an emergency during the visit?
- ☐ Have you established appropriate emergency contacts (24 hrs) with your base establishment and parents/carers?
- ☐ Do you know how to contact the LA emergency contact if you need to?
- ☐ Are you aware of establishment/LA emergency procedures?

**Mobile phones**

- ☐ Have you agreed a mobile phone use policy with parents and young people?

**Post-visit arrangements**

- ☐ Complete evaluation of the visit
- ☐ Review risk management procedures and update if necessary – involve EVC.
- ☐ Outstanding invoices paid
- ☐ Borrowed equipment returned
- ☐ Displays
- ☐ Parents'/carers' evening
- ☐ Report to governors
- ☐ Thank you letters
- ☐ Article with photographs to the local media

## TEMPLATE FORM 5

### Independent provider questionnaire

This questionnaire can be used by the visit leader as a basic check of a **provider** or **venue**. Visit leaders should ask the provider/venue to complete this form, or provide the same information in another format; for example, download from the provider/venue website, **before** making a booking.

#### Notes for independent providers and venues:

You may have your own documentation that covers the same information in a different format e.g. as a download from your website. This is acceptable as an alternative to this form.

If you do not supply this information in an alternative way then please complete all relevant sections of this form by answering **yes**, **no** or not applicable (**n/a**) after each question. If you wish to provide further information then please continue on separate sheet(s) and attach to this form. An electronic signature is acceptable on this form to allow you to email the completed form.

Name of provider / venue: \_\_\_\_\_

Address:

\_\_\_\_\_

\_\_\_\_\_

—

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

Email: \_\_\_\_\_

Website: \_\_\_\_\_

Name of person completing this form:

\_\_\_\_\_

Signed:

\_\_\_\_\_

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

\_\_\_\_\_

1. Does the above Provider have any official recognition or accreditation? If **yes**, please give details here:

\_\_\_\_\_

2. Do you have written risk assessments for all of the premises/services/activities that you provide?  
If **yes**, are these risk assessments available to view if required?

\_\_\_\_\_

#### Important note: please do not send copies of your risk assessments.

Are there any actions arising from your risk assessment that the visit leader and their group need to be aware of/follow?

If yes, how do you inform them of this?

\_\_\_\_\_

---

3. Do all of your facilities comply with relevant statutory requirements? YES / NO

4. Do you provide first aid equipment at the venue/activities? YES / NO

- Will a trained first-aider be present while the group is visiting? YES / NO

5. Can you provide, if required, contact details for similar groups who have recently used your services?  
YES / NO

6. Do you provide opportunities for preliminary visits? YES / NO

7. Do you provide activity equipment (e.g. personal protective equipment or play equipment)?

- ☐ Do you have a written and recorded system of safety/maintenance checks for this equipment?
- ☐ Where national standards exist, does the activity equipment conform to those standards?

8. Do you hold a public liability insurance policy which will be current at the date of the proposed visit and covering both directly provided and sub-contracted activity (where this occurs)?

If **yes**, please state here the Limit of Indemnity:

---

9.

- ☐ Do you have written emergency procedures?
- ☐ For activities that take place off site do you have written late-back procedures?
- ☐ Do you have accident/incident/near-miss reporting and action procedures?

10. Do you have a procedure for dealing with complaints? YES / NO

11. Residential establishments only

- ☐ Will the group be required to share sleeping accommodation with others not from their group?
- ☐ Are staff bedrooms adjacent to young person bedrooms?
- ☐ Is sleeping accommodation secure from intruders?
- ☐ Can the emergency services access the site easily if required?
- ☐ Do you carry out a fire drill with the visiting group before their first night?

12. Provider-led activities only

- ☐ Please indicate (by checking the relevant boxes) the group types that you/your designated supervisory staff have experience of working with:

Primary schools ☐      Secondary schools ☐      Youth Groups ☐      Special schools ☐

Young people with challenging behaviour ☐      Sixth form and FE college students ☐

- ☐ Do you provide regular opportunities for liaison between your staff and staff of the visiting group?
- ☐ Is there a clear definition of responsibilities between your staff and staff of the visiting group?
- ☐ How do you inform the leader of the visiting group about aspects of the visit for which they will have responsibility?
- ☐ Have any Provider staff who may have significant contact with young people undergone an

enhanced DBS check?

13. Adventure activity providers only:

- ☐ Do you offer adventure activities that are licensable under the Adventure Activities Licensing Regulations (for details please refer to [www.aals.org](http://www.aals.org))

If **yes**, please list on separate sheet and attach to this form

- ☐ Do you provide any non-licensable adventure activities

If **yes**, please list on separate sheet and attach to this form

- ☐ Are records of activity leaders' experience and competence available for inspection on site if required?

14. Please supply any additional information that you think may be helpful to the visit leader or the local authority.

**Checklist for young people going on a visit**

<b>QUESTION</b>	<b>ANSWER</b>
What are the aims of the visit?	
Who is the visit leader?	
Where am I going to visit?	
What activities will I be taking part in?	
What do I need to do to keep myself safe during the visit?	
What should I do if I get lost or get into difficulties during the visit?	
What is written in the code of conduct for the visit?	
What will happen if I break the code of conduct?	
What should I do to keep my money and valuables safe?	
<b>Residential visits only</b> What are the address(es) and telephone number(s) of the place(s) where I'll be staying?	
<b>Visits abroad only</b> What local customs/rules of behaviour do I need to be particularly aware of?	
Other information important for the visit	

**TEMPLATE FORM 7**

**Summary of information about young people and adults participating in a visit**

Surname	Forename(s)	Date of birth	Address	Next of kin	Contact number(s)	Relevant special needs/medical information

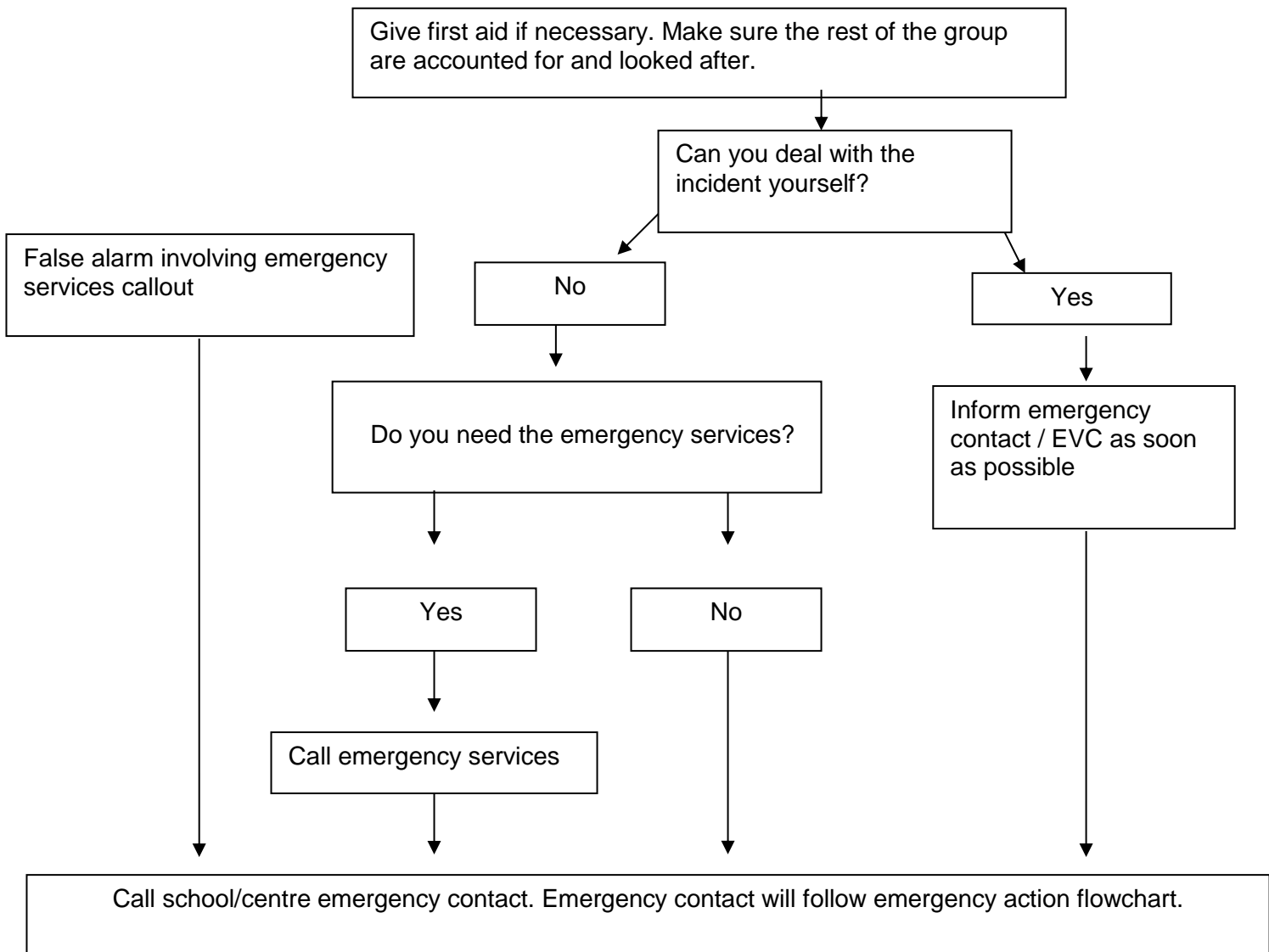
**TEMPLATE FORM 8**[illegible]



## TEMPLATE FORM 9

### Visit leader emergency action (copy to be carried by visit leader(s))

**Do not speak to the media.** Direct all enquiries to the local authority corporate public relations team by emailing [public.relations@newport.gov.uk](mailto:public.relations@newport.gov.uk) or ringing the City Contact Centre on 01633 656656 during normal office hours or 01633 656667 out of hours or in any emergency situation.



**Base (emergency) contact: action on receiving an emergency call**

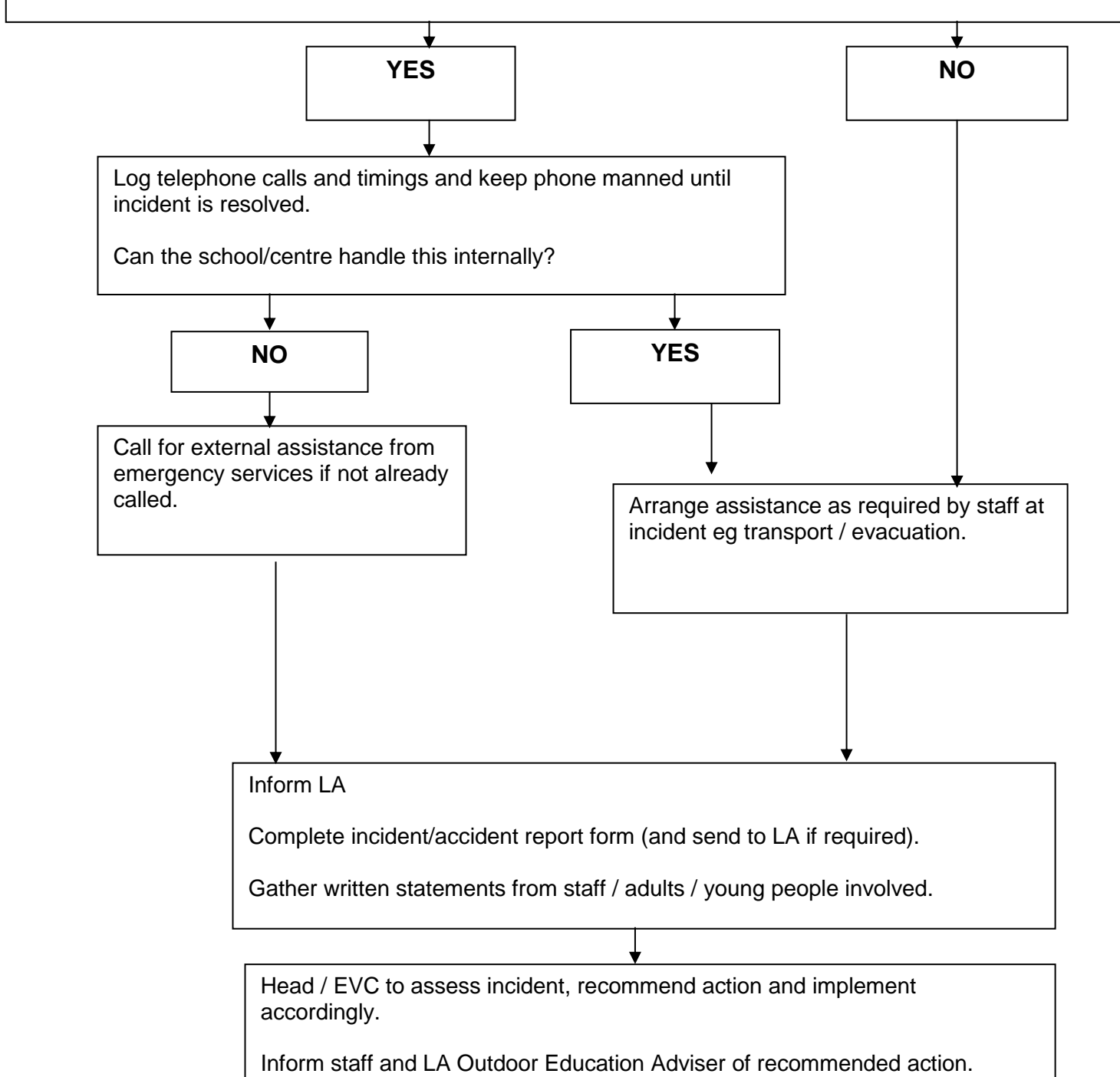
Record information on 'Incident Record Form'

**Do not speak to the media**

**Direct all enquiries to LA press officer via the City Contact Centre (01633 656656)**

**Is the incident serious? If unsure assume yes.**

Serious = involving serious injury / illness, missing persons requiring assistance at the location, or evacuation



## TEMPLATE FORM 11

### Incident record form

N.B. This form should be completed by an emergency contact handling an emergency call. The educational visits coordinator (EVC) should ensure that local authority incident reporting procedures are followed as soon as possible after the incident.

### ABOUT THE INCIDENT

Name(s) of any individual(s) affected by the incident

---

Time and date of incident

---

Location of incident

---

Activity taking place (if applicable)

---

Name(s) of staff leading the activity (if applicable)

---

Contact number for visit leader

---

Name(s) of key witness(es)

---

Description of incident and action taken (continue on separate sheets if necessary)

---

---

Form completed by

---

Date

**ACTION TAKEN TO AVOID A REPEAT INCIDENT** (To be completed by Head or EVC following a review of the incident – continue on separate sheets if necessary).

---

---

Signed (Head or EVC)

---

Date

Reviewed by LA officer

---

(Position)

Date

---

[Type text]

## TEMPLATE FORM 12

### Example standard risk management procedures

This section sets out the standard risk management procedures that are followed by staff of this school/establishment when leading off site visits

**To be adapted as appropriate. Do not just cut and paste.**

Risk management form: All off site visits		
2011		
Significant hazards and harm which may occur	Who might be harmed?	Safety measures: <i>Measures that are in place and/or will be taken to reduce the risk to a tolerable level</i>
Crossing roads/walking along pavements	Pupils	Brief children of conduct expected of them when walking/crossing roads Ensure staff are placed at front, middle and rear of children. Pupils to walk in pairs or single file. Members of staff to choose safe place to cross roads (if not using recognized pedestrian crossing) 2 members of staff to stand in road with children walking between.
Weather conditions	Pupils/staff	Check weather forecast prior to visit Brief pupils/parents of possible weather conditions prior to visit Ensure appropriate clothing/footwear is worn or taken bearing in mind Summer and Winter conditions Check with parents that it is OK to put sun cream on children Take spare clothes for children not suitably prepared Ensure emergency shelter is taken if in demanding environment
Scientific demonstrations at science venues	Pupils	School/establishment staff to ensure that pupils follow instructions of qualified staff at venue and to adhere to rules regarding proximity
Trips, slips and falls	Pupils/staff	Ensure appropriate footwear is worn and shoelaces tied Brief pupils/staff of possible areas where trips, slips and falls may occur Ensure First Aid kit is carried by visit leader Ensure any medical conditions of pupils are disclosed prior to visit

[Type text]

Transport to and from venues	Pupils/staff	Ensure recognised LA bus company is used hold on chaps and chappesse. Change to reputable coach company Ensure seat belts are worn at all times and are checked by visit leader
Stranger danger	Pupils	Ensure children are made aware not to walk off with an unknown adult unless given specific instruction by visit leader. Regular head counts Supervised at all times, including appropriate supervision when toileting
Beach/coastal visits - washed into sea caught by rising tide	Staff and pupils	Check tide times before embarking on trip Check weather forecast for day of visit Brief pupils and staff not to go near waters edge
Accident/emergency	Staff pupils	Follow emergency procedure guidelines carried by visit leader Ensure suitable staff helper (in addition to visit leader) understands emergency procedure Brief children of what to do in an emergency and how to summon help
Getting lost/separated from group (outdoor venues)	Staff	Regular headcounts Ensure pupils are to stay in small groups Ensure staff accompany pupils at all times Brief pupils to stay put if lost or separated and to shout for attention Ensure all pupils know name of visit leader, staff and school/establishment name
Getting lost/separated from group (indoor venues)	Staff	Regular headcounts Ensure pupils are to stay in small groups Ensure staff accompany pupils at all times Brief pupils to stay at venue if lost or separated never to leave the premises Brief children to make their way to reception Ensure all pupils know name of visit leader, staff and school/establishment name



Medical Conditions	Pupils	<p>Ensure medical conditions are disclosed prior to visit</p> <p>Ensure consent is given for staff member to administer medicine if required</p> <p>Ensure medicines, epi pens, inhalers, etc are carried by visit leader</p> <p>Ensure at least one staff member/adult volunteer knows how to administer medicine if required.</p>
Supervision on countryside / coastal walks. (specific risks must be addressed for each visit)	pupils	<p>Brief pupils and helpers of proposed route</p> <p>Brief pupils of appropriate behaviour</p> <p>Ensure member of staff at front, middle and rear of pupils</p> <p>Ensure correct clothing and footwear is used</p>
<b>Farm Visits</b> Machinery, vehicles, risk of allergy, contamination, bites, kicks, etc	Pupils and staff	<p>Brief pupils to stay out of way of machinery/vehicles and to follow supervision by farm staff</p> <p>Ensure parents have informed staff prior to visit of possible allergies</p> <p>Ensure medicines are carried by visit leader (if required)</p> <p>Brief children not to touch animals unless safe to do so</p> <p>Ensure pupils/staff are made aware of farm rules, reinforced by farm staff</p> <p>Ensure all eating is done in hygienic locations</p> <p>Ensure children wash hands before eating</p> <p>Make sure First Aid kit is carried</p>
<b>Castle visits</b> High walls – falls Steep, dark stairs - falls	Pupils and staff	<p>Visit leader knows venue and specific areas of risk in the castle (following recce)</p> <p>Brief other staff</p> <p>Supervise pupils appropriately</p>

Additional notes: Standard risk management procedures are reviewed and updated annually. Old versions are kept on file.

Risk assessment devised by.....

Implementation date:

Review date:



Author: Deborah Weston

Date: September 2019

Review Date: September 2020

Version: 1.2

