

Major Changes to the Policy and Procedures for Offsite/Out of Hours Educational Activities

- The Policy is now known as the 'Sandwell Policy and Procedures for Offsite Activities and Onsite Adventures (2017)'.
- The Policy is now split into two sections: Out of Hours Activities and Offsite Activities which should be managed differently. Please refer to the relevant section of the Policy for full details.
- Year 3 supervision ratio amended from 1:6 to 1:10 to ensure that schools can manage this year group better. Addition of wording for over 18 year olds.
- Transition days to other schools need no longer be planned and managed under the Offsite Policy.

Sandwell MBC

Policy & Procedure for Offsite and Out of Hours Activities

Please note this policy is now split into two sections; Out of Hours Activities and Offsite Activities. Please refer to the relevant section for full details of the policy.

Out of Hours Policy

If your Out of Hours activity falls under one of the following categories:

- Residential – any form of residential taking place on your own site, this includes camping on your school field, sleeping in classrooms, the school hall etc.
- Adventurous – any activity that is mentioned in the list of adventurous activities which may take place on your own school site

you **MUST FOLLOW** the Offsite policy for all aspects of your visit:

If your activity does not fall into the categories above you do not need to follow the Offsite policy and there is no longer a requirement to use EVOLVE to document these types of activities.

You should ensure that the following happens for all onsite non-residential/ non adventurous activities:

- A minimum of 2 adults should be with the group of children/young people at all times, irrespective of the number in the group
- Someone with a good working knowledge of First Aid should be present
- Fire/Evacuation procedures should be understood
- Consent forms (one off consent can be used) should be available in case of an emergency

Offsite Policy

1. Provision of Employer Guidance

Sandwell Metropolitan Borough Council has formally adopted the Outdoor Education Advisers Panel Guidance for the Management of Outdoor Learning, Off-site Visits and Learning Outside the Classroom “National Guidance” as “Sandwell Metropolitan Borough Council Policy & Procedure for Offsite and Out of Hours Educational Activities”. The OEAP National Guidance can be found on the following web site:

<http://oeapng.info>

It is a legal expectation that employees **must** work within the requirements of their employer’s guidance; therefore Sandwell Metropolitan Borough Council (Sandwell MBC) employees must then follow the requirements of “OEAP National Guidance (NG)”, as well as the requirements of this Policy Statement.

Sandwell MBC employees should also follow OEAP NG recommendations.

Where another employer (such as the Governing Body of a Voluntary Aided school) wishes to opt into Sandwell MBC guidance, systems and processes for supporting and monitoring LOfC activities, they should produce a policy statement that makes this clear and sign a Service Level Agreement with the Educational Visits Team.

Where a Sandwell MBC employee commissions LOfC activity, they must ensure that such commissioned agent has either:

1. adopted Sandwell MBC or OEAP National Guidance

or

2. have systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

2. Scope and Remit

The OEAP NG document "[Basic Essentials – Status, Remit and Rationale](#)" 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 and Duty of Care](#)".

3. Activities NOT covered by this policy

The following activities are not covered by this part of the policy:

- **On-site Out of Hours activities – please refer to the separate section of the policy entitled Out of Hours Activities.**
- **Transition Days that take place at other schools or colleges and also university open days. These should be classed as alternative provision and should be risk assessed and managed under your transitional policy.**

4. Ensuring Understanding of Basic Requirements

As an employer, Sandwell MBC is required to ensure that its employees are provided with

- appropriate guidance relating to visits and LOfC 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 Advisers 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 LOfC in Sandwell MBC is the OEAP National Guidance web site.

The relevant training courses in Sandwell MBC are:

1. Sandwell MBC Educational Visit Coordinator (EVC) Training - all Sandwell MBC Children's Services establishments are required to have a current, Sandwell trained EVC in post.
2. Sandwell MBC Educational Visit Coordinator (EVC) Revalidation Training - all Sandwell MBC Children's Services establishments are required to ensure that their EVC undertakes a formal revalidation from time to time.
3. Sandwell MBC Visit Leader Training – this course is mandatory for all those that lead offsite visits. Currently there is no **revalidation** requirement. However, to meet LOfC guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice, so update refresher training **is strongly recommended**.

For the purposes of day-to-day updating of information, Sandwell MBC 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.sandwellvisits.org.uk

Where an employee experiences problems with finding the material they are looking for, or requires clarification or further help and guidance, they should contact their establishment's Educational Visits Coordinator (EVC), or the Adviser nominated by their employer.

The nominated Advisers in Sandwell Metropolitan Borough Council are:

Aileen Barlow

and

Christina Grange

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5. Approval and Notification of Activities and Visits

Sandwell MBC uses an online system for notification and approval called EVOLVE. A key feature of this system is that visits and LOtC activities requiring approval are automatically brought to the attention of the Local Authority. Those visits and activities not requiring approval may be viewed, sampled or monitored using the database and diary facilities of the system.

It is a requirement that all Sandwell MBC establishments use the EVOLVE system; for further advice and help using the system, the establishment should contact the nominated Advisers (see section 3).

For approval by the LA the application must be entered on the system a minimum of 6 weeks before the visit / trip is due to take place.

Any paper documentation required by the Local Authority to be retained, should remain within the school/centre in the Evidence File and be available for inspection by the LA and/or OFSTED.

6. Risk Management

As an employer, Sandwell MBC has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level – but not eliminated, 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 Sandwell MBC 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. Sandwell MBC 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 **Sandwell MBC** requirement to produce a risk assessment in a particular format; but there is a 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.

Department for Education guidance (2011) states, "a written [risk] assessment is not needed for every activity". To be clear, risks and control measures should always be considered but a written risk assessment is not always necessary. If a written risk assessment is not completed then the relevant Risk Management Checklist/s (available in the Resources Section of EVOLVE) must be used.

A written risk assessment **is required** in the following circumstances:

1. Where a trip or activity involves any component of adventurous activity
2. Where a trip involves an overnight stay
3. Where a trip is taking place wholly or partly overseas

NO VISIT/ACTIVITY SHOULD TAKE PLACE WITHOUT EITHER A WRITTEN RISK ASSESSMENT OR COMPLETION OF A RISK MANAGEMENT CHECKLIST.

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Risk Management”](#).

7. 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, Sandwell MBC is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Critical Incident Management for Visits”](#).

To activate support from Sandwell MBC, the following telephone numbers should be used:

Call the 24/7 Community Alarm Service on +44(0)121 500 5500 - ask for the Duty Emergency Planning Officer to be alerted. If the Community Alarm is not answered call +44(0)7785 925578.

These 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. Under no circumstances should these numbers be given to young people or to their parents or guardians.

To assist with this there is an Emergency Contact Card available in the Resources Section of EVOLVE which should be populated with all the relevant contact numbers and should be given to all adults on the visit for them to take with them.

8. Monitoring

As an employer, Sandwell MBC ensures that there is sample monitoring of the visits and LOtC activities undertaken by its establishments, either by attaching such monitoring duties to its officers, or by delegating these tasks to establishments. Such monitoring should be in keeping with the recommendations of OEAP 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.

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Monitoring”](#).

9. Assessment of Leader Competence

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of Sandwell MBC Policy that all Sandwell MBC leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with the LOtC guidance.

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Assessment of Competence”](#).

10. 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 Sandwell MBC Children's Services management structures. These are:

1. [Director of Children's Services](#)
2. [Lead Member\(s\) for Children's Services](#)
3. [Line Manager of an Outdoor Education Adviser](#) (Educational Visits Adviser in Sandwell MBC)
4. [Outdoor Education Adviser](#) (Educational Visits Adviser in Sandwell MBC)
5. [Adviser \(other than an OEA/EVA\) including Health and Safety Officer](#)
6. [Manager of an Outdoor Centre](#)

For further information, all users of the guidance are recommended to read the individual OEAP NG documents headed as above.

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within most Children's Services establishments. These are:

1. [Member of Board of Governors or Management Board](#)
2. [Head Teacher](#)
3. [Manager of an establishment other than a school](#)
4. [EVC](#)
5. [Visit or Activity Leader](#)
6. [Assistant Visit leader](#)
7. [Volunteer Adult Helper](#)
8. [Those in a position of Parental Authority](#)

Refer to individual OEAP NG documents headed as above.

11. Charges for Off-site Activities and Visits

Sandwell MBC Heads/Managers, 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.

For further information, all users of the guidance are recommended to read the OEAP NG document: "[Charges for Off-site Activities and Visits in an Educational Establishment](#)".

12. Vetting and Disclosure and Barring Service (DBS) Checks

Sandwell MBC 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.

For further information, all users of the guidance are recommended to read the OEAP NG document: "[Vetting and Disclosure & Barring Service \(DBS\) Checks](#)".

13. 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 (including the developmental age) of the group;
- gender issues;
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- 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 competence.

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years. **At a local level, Sandwell MBC prescribes the following minimum ratios for supervision:**

- **Under 5's - 1:5**
- **Years 1 and 2 - 1:6**
- **Year 3 - 1:10**
- **Year 4 – 6 - 1:15**
- **Years 7 to 13 - 1:20**
- **Students aged 18 and over – 1:20**

There will, however, be occasions when these ratios are not sufficient to ensure effective supervision. It should be noted that these are minimum levels and all the factors above should be considered when setting a proper supervision level.

Where an activity is governed by a National Governing Body, for instance British Canoeing, their minimum ratios should also be taken into consideration.

Sandwell MBC also requires that there should never be less than two adults in charge of a group irrespective of the age of the children or young people. If the visit is abroad both adults should be teachers or senior youth officers.

For further information, all users of the guidance are recommended to read the OEAP NG document: "[Ratios and Effective Supervision](#)" and the LOfC document: "[Group management and Supervision](#)"

Types of supervision

The type of supervision should be risk assessment based on the nature of the activity/visit, age and ability of the students etc.

Direct

Supervisors must at all times, wherever possible, be in visual contact with young people.

Whatever the length and nature of the visit, regular double head counting of young people should take place, particularly before leaving any venue. All supervisors should carry a list of all young people and adults involved in the visit at all times.

Young people, particularly in school years 1 to 3, should be easily identifiable, especially if the visit is to a densely populated area. Brightly coloured caps, T-shirts or a school uniform can help identify group members more easily. Young people should not wear name badges but some schools/centres find it useful to provide young people with badges displaying the name of the school/centre and its emergency contact number. The Visit Leader should establish rendezvous points and tell young people what to do if they become separated from the group.

Indirect Supervision (supervision within clear boundaries)

Occurs when a group is given the freedom to explore an environment or engage in an activity away from direct adult supervision but within clearly identified and agreed boundaries, for example:

- Small group or individual work within a gallery, museum, cultural or historic site or city.
- Time between more structured activities during a residential visit.

This should be set up so that, in emergency or changed circumstances, it should not be a difficult or lengthy process to re-establish direct supervision.

Keys to indirect supervision (supervision within clear boundaries) include:

- Identifying clear geographical boundaries within a suitable area and ensuring everyone is aware of these.
- Setting a time limit by which all are to be back at an agreed location.
- Ensuring young people are in small 'buddy' groups and know to stay together.
- Briefing students as to the location of leaders during the activity: some leaders could be in a fixed position and others roaming the agreed area.
- If students get lost, they know not to wander aimlessly but to stay together and wait for a leader to find them.
- If abroad, ensuring students carry a small briefing card in the local language.
- On a residential visit, ensuring students know the location of their accommodation (carrying a hotel card from reception is a simple and effective idea).

Remote

The aim of visits for older participants may be to encourage independence and investigative skills, and some of the time on visits such as trips abroad and fieldwork may be unsupervised. The Visit Leader should establish during the planning stage of the visit whether the young people are competent in remote supervision and should ensure parents have provided written consent to this part of the visit. The Visit Leader remains responsible for young people even when not in direct contact with them.

Parents should be told, before the visit, whether any form of remote supervision will take place.

For further information, all users of the guidance are recommended to read the OEAP NG document: [**“Group Management and Supervision”**](#).

14. 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. Establishment policy 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
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

Sandwell MBC takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

For further information, all users of the guidance are recommended to read the OEAP NG document [**“Preliminary Visits and Provider Assurances”**](#).

15. Sandwell MBC Insurance arrangements

It is strongly recommended that establishments take out appropriate insurance for all offsite activities.

Where an establishment has opted into the policy provided by Sandwell MBC it is designed to provide cover to all participants on the trip: pupils, teachers, other school staff and volunteers. The policy covers personal accident as well as being a mini travel insurance.

Employees within Sandwell MBC run schools also benefit from group personal accident cover which is separate from offsite cover. This provides increased personal injury benefits (including injury from assault) where the event occurs during employment. There is also limited cover for damage to clothing as a result of assault.

In addition, employees and volunteers assisting with Sandwell MBC activities benefit from cover under Sandwell MBC’s Public & Employers’ Liability Policies while acting in the course of business. So in an offsite scenario, if an employee suffers an injury as a result of negligence on the part of Sandwell MBC

or one of its employees, the employer's liability insurance arrangements will respond. Should an employee or volunteer cause injury or loss to a third party as a result of negligence during an offsite trip, the public liability policy will respond.

Insurance – external service providers

Establishments should satisfy themselves that those providing coaches, minibuses, taxis or other means of transport as well as those providing activity resources have insurance arrangements in place to cover the period of the proposed activity. Key to this would be the existence of Motor and Public Liability Insurance. Insurance policy documents or other confirmation of cover, e.g. from brokers, needs to confirm that the business activity provided is covered by the business description within policy documentation.

Visit / Activity Leaders should contact the Local Authority Risk Management/Insurance Section to seek any clarification of the above, including where circumstances would require early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Insurance”](#).

16. 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.

Establishments 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, Heads/Managers, 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:

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

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Inclusion ”](#).

17. Good Practice Requirements

To be deemed competent, a Sandwell MBC 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 Sandwell MBC 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 their employer’s guidance supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.***
- ***Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.***
- ***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.”***

It is also the Visit Leader’s responsibility to risk manage the visit and carry out a risk assessment as required, see Section 6.

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. Establishments should view original documents and certificates when verifying leader’s qualifications, and not rely on photocopies.

Where a Volunteer Helper is a parent (or otherwise in a close relationship to 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.

For further information, all users of the guidance are recommended to read the OEAP NG document: **[“Good Practice Basics”](#)**.

18. 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 in Sandwell MBC’s transport policy. 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.

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

For further information, all users of the guidance are recommended to read the OEAP NG documents: "[Transport: General Considerations](#)"; "[Transport in Minibuses](#)"; and "[Transport in Private Cars](#)".

19. Planning

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

- The plan is based on establishment 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.

It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brain storming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigour (an Ofsted expectation), then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and also be a vital part of the risk management process in providing some objectivity in a "Risk Benefit Analysis". Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

This supports the move towards developing activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to "*operational guidance*" that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

20. The Value and Evaluation of LOtC

The Ofsted report "***Learning Outside the Classroom – How Far Should You Go?***" (October 2008) makes statements in the strongest terms to support the value of LOtC, including the fact that it raises achievement. Sandwell MBC Head Teachers, Managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report.

For further information, all users of the guidance are recommended to read the OEAP NG document: "[Ofsted and LOtC Summary](#)".

However, it also highlights the finding that *even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigour* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the OEAP National Guidance document: "[Rigorous Evaluation of LOtC: Meeting Ofsted Expectations and Assuring Quality](#)".

21. First Aid

First aid should form part of the planning process and should be considered in the risk management of the visit/trip.

Before undertaking any onsite or offsite activities, the Head Teacher/Manager or the Visit Leader should assess what level of first aid might be needed. On any kind of visit/activity the Leader should have a good working knowledge of first aid and ensure that an adequate first-aid box is taken. If there is no qualified first aider travelling with the group then the Visit Leader should assure themselves that there is first aid provision available at the venue to be visited. For adventurous activities, visits abroad or residential visits it is strongly recommended that at least one of the group's adults is a fully and appropriately trained first-aider.

The minimum first aid provision for a visit is:

- A suitably stocked first aid box.
- A person appointed to be in charge of first aid arrangements.

For further information, all users of the guidance are recommended to read the OEAP NG document: "[First Aid](#)".

22. Child Protection

It is most important that all adults who are taking part in any visit/activity in a supervisory role are aware of the correct action to take when confronted with an actual or suspected case of child abuse. Therefore all such adults, whether staff or volunteer, should be aware of and have a working knowledge of the department's documented procedures for protecting children from abuse, "Child Protection Policy and Procedures".

It is regrettably the case that adults working with children in any capacity are becoming increasingly vulnerable to allegations of child abuse. However, any disclosure must be treated seriously and in accordance with procedures.

It is, therefore, extremely important that all adults avoid situations that could be misunderstood. It is advised that wherever possible, no adult should be alone with a young person. All staff members should have appropriate clearance through the DBS, wherever possible this should also be the case for volunteers. On residential visits **all** adults **must** have been cleared by the DBS.

During any activity it is quite often the practice for staff to take photographs of the young people who are participating in the activity. It is important to remember that if such photographs are to be used for publicity purposes then the written permission of parents must be sought. It is also important that any such photographs are not allowed to be misused and under no circumstances should they be published on any website without the parents' knowledge and written permission.

23. Communicating with Parents

Information

Parents should be informed in writing of any out of hours or off-site activity unless it is a regular part of the curriculum which parents have already been informed about through the school prospectus or a letter.

Before residential visits, or when the young people are to travel abroad or engage in adventurous activities, parents should be encouraged to attend a briefing meeting where written details of the proposed visit should also be provided. There should be alternative arrangements for parents who cannot attend or who have difficulty with communication in English.

Parents should be told specifically where young people are being transported in the private vehicle of an adult or another young person on the visit. Head Teachers/Managers should consider whether consent should be obtained before young people can be carried in a private vehicle.

The Visit Leader should tell parents if they will be expected to fund the early return of a young person whose conduct gives cause for concern on a visit. A written agreement may be necessary.

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Parents and Guardians”](#)

Parental consent

The Department for Education (DfE) has prepared a one-off consent form to be signed by the parent(s) (or those with parental responsibility) on enrolment of their child in a school. A Sandwell Metropolitan Borough Council version of this form is attached as Appendix A to this document.

Head Teachers/Managers or Visit/Activity Leaders should seek additional consent (Appendix B) for:

- Adventurous activities.
- Residential visits.
- Visits abroad.

If parents withhold consent, the young person should not be taken on the visit but the curricular aims of the visit should be delivered to the young person in some other way wherever possible. If the parents give a conditional consent the Head Teacher/Manager will need to consider whether the young person may be taken on the visit or not.

Anyone in Education who is 18 or over may sign their own consent form (this should be the same type of consent for as the rest of the group) but will still form part of the overall group in respect to Supervision Ratios – see section 12.

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Parental Consent”](#).

24. Adventure Activities Licensing Regulations

Employers, Head Teachers/Managers, EVCs and Visit 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 DfES. 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 licence is an assurance of safety. It does not accredit educational or activity quality. Where Sandwell MBC's outdoor centres are providers of "in scope" activities as defined by the regulations, they are required to be licensed.

For further information, all users of the guidance are recommended to read the OEAP NG document: "[**Summary of Adventurous Activity Licensing Regulations**](#)"

25. Types of Visits

There are specific activities that require the approval of the Local Authority. This must be sought in advance and the activity will only be sanctioned if the Visit Leader is able to show that the appropriate planning, risk assessments and emergency procedures etc are in place.

Activities that fall into this category include the following:

| | |
|--------------------------------|--|
| Climbing | Rock climbing Ice climbing Gorge walking Ghyll scrambling Sea level traversing / Coaststeering Abseiling |
| Trekking | Mountaineering Hill walking (open country) Fell running Orienteering (open country) Cycling (open country) |
| Caving | Caving Potholing Mine exploration |
| Watersports | Canoeing Kayaking Dragon boating Wave skiing Rafting Sailing Sail boarding Wind surfing Water skiing Powered safety / rescue craft Snorkel / Aqua lung Open water swimming Swimming in private pools Swimming in public pools outside the Black Country & Birmingham Local Authorities |
| Snowsports (inc Dry Slopes) | Skiing Snowboarding Tobogganing Bobsleighbing Sledging |
| Others | Camping in open country (including Bivouacking) Air activities (excluding commercial flights) Shooting Archery Motor sports including Go-Karts and Quad Bikes Ropes courses |

Paintballing
Horse riding / Pony trekking

'Open country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the Local Authority if you think this may apply.

Approval should be sought at least six weeks before the visit/activity is due to take place to allow the Local Authority to make the necessary checks regarding such issues as training and qualifications, insurance and CRB clearance.

Adventure activities using licensed providers

For further information, all users of the guidance are recommended to read the OEAP NG document: ["**Adventurous Activities**"](#).

Holding a licence means that a provider has been inspected and the licensing authority are satisfied that appropriate safety measures are in place for the provision of the specified licensed adventure activities. Other elements of the provision – such as catering and accommodation are not covered by the licensing scheme. These should be checked separately by the Visit Leader.

Adventure activities using non-licensed providers

Not all providers are required to hold a licence. Voluntary bodies and schools providing for their own members and pupils respectively are exempt. Commercial bodies and local authorities are also exempt if their activities fall outside the scope of the regulations. It might simply mean the provider or the activity does not need a licence.

Many providers are accredited under non-statutory schemes run by, for example, the Wales Tourist Board, and certain National Governing Bodies (NGBs). Schools/centres/LAs can contact these accreditors to ascertain a provider's management of safety. The British Activity Holiday Association can provide advice on accreditations.

If proposing to use a non-licensed provider, the Visit Leader should obtain assurances in writing from the provider that:

- Risks have been assessed and that the provider's staff are competent to instruct and lead young people of the group's age range on the activity. Competence could be demonstrated by holding the relevant NGB award where it exists or through successful participation in an NGB approved in-house scheme.
- The equipment is appropriate and that its safe condition is checked before each use.
- Operating procedures conform to the guidelines of the National Governing Body for the activity where this is appropriate.
- Clear management of safety systems is in place.
- There is appropriate provision for first aid.
- There are emergency procedures (including arrangements for informing next of kin and for alerting the Visit Leader), that the provider's staff are competent in the procedures

and will hold emergency phone numbers and addresses of the group members, and that the group will have a fire drill as soon as possible on arrival at the provider's base.

The Visit Leader may wish to ask the provider for names of other schools/centres who have recently used its facilities.

Other issues to consider with all adventure activity providers

The Visit Leader should check and agree the provider's arrangements for supervision and recreation during the evenings and between adventure activities. The Visit Leader should also provide any relevant information for the provider such as the group's age range, competence etc.

The Visit Leader and staff retain ultimate responsibility for young people at all times during adventure activities, even when the group is under instruction by a member of the provider's staff. The provider is responsible for the safe running of an activity. Clear handover and handback procedures should be in place. Everyone, including the young people, must have an understanding of the roles and responsibilities of the school/centre staff and the provider's staff.

The Visit Leader and other staff should have sufficient information on what the activity involves before it takes place. They should approach the instructor at an appropriate safe interval if they are concerned that the young people may be at unnecessary risk. Assurances may be sought that the provider has:

- Checked the suitability of the staff, including temporary workers, to work with young people.
- Clearly defined the roles and responsibilities of its staff.
- Made appropriate security arrangements.
- Obtained appropriate public liability insurance.

School/centre-led adventure activities

If a member of the school/centre staff is to organise, lead and instruct young people on adventure activities they should complete the checks set out under **Planning your Activity/Visit**. The Visit Leader must satisfy the LA and the Head Teacher/Manager that:

- The Visit Leader and other supervisors are competent to act as leaders and/or instructors of young people in the activity – bearing in mind that some of these young people may be novices. Competences should be demonstrated by holding the relevant NGB award where it exists. The relevant NGB can advise on this.
- The Visit Leader is competent in safety procedures and the planning of adventure visits.
- An appropriate risk assessment has been completed.
- The supervision will be appropriate.
- There is adequate first aid provision, expertise and equipment within the group.
- The emergency procedures include activity-specific measures and that supervisors are competent to carry them out.
- The equipment is appropriate, safe and in good condition.

- Every young person is suited to the activity and is properly prepared and equipped.

Schools/centres choosing to employ, rather than contract with, an unlicensed freelance provider of adventure activities – who would otherwise need a licence to trade – take full legal responsibility for all aspects of the activity. If the provider, in the employment of the school/centre, provides licensed facilities to the pupils of another school/members of another centre, the employing school/centre will need a licence.

26. Swimming in the sea or other natural waters

Swimming in the sea or other natural waters is a potentially dangerous high risk activity for a group of young people.

For further information, all users of the guidance are recommended to read the OEAP NG document: [“Natural Water Bathing”](#).

27. Swimming Pools

Head Teachers/Managers and Local Authority Officers will be aware of their local swimming pool facilities for curricular activities. Visit Leaders should follow the recommended safe supervision levels at the pool for young people.

If considering the use of a swimming pool not used before or monitoring the hazards of a regularly used pool it is advisable to observe and check the following:

- Is there constant pool supervision by a sufficient number of qualified lifeguards?
- Is the water temperature appropriate?
- Is the water clear?
- Are there signs clearly indicating the depth – is there a shallow end and is the water there shallow enough?
- Does the pool cater for young people with disabilities?
- Does the deep end allow for safe diving?
- Is there a poolside telephone?
- Are there a resuscitator and other pieces of first-aid and rescue equipment, and is there someone trained to use them?
- Is there a changing room for each sex?
- Does the pool cater for any particular religious or cultural factors?
- Are the changing and showering facilities safe and hygienic?
- Can clothes be stored securely?
- Have the young people been instructed how to behave in and around the water?

Parental consent does not mean that Visit Leaders should not check for themselves the level of a young person’s swimming ability.

It is imperative that there is a clear understanding of how the responsibilities of supervision will be allocated between the pool lifeguard and the visiting group staffing team. Accompanying staff will

[IL1: PROTECT]

need to be aware of the pool's normal operating procedures (including risk assessments), emergency action protocols and have agreed their poolside supervision arrangements at the time of booking.

For further information, all users of the guidance are recommended to read OEAP NG document: "[Swimming pools](#)"

28. Visits Abroad / Overseas

General

Travelling abroad can be hugely rewarding for young people and adults alike, but it is important that careful preparation takes place. Much of the earlier advice also applies to visits abroad, but there are some additional factors that need to be considered, not least because the legislation may be different from that of the UK.

If a child is subject to a care order, foster parents will need to ensure that the Social Services Department consents to any proposed trip. If a young person is a ward of court, the Head Teacher/Manager should seek advice from the court in relation to journeys and activities abroad well in advance.

All group members should carry an appropriate amount of foreign currency at all times eg money for telephone (or a phone card).

Taking a group of young people on an aircraft requires careful planning and preparation. The airline/travel agent will be able to advise on particular requirements. If the group includes any members with disabilities, it is advisable to check that the airline has a wheelchair service and lifting facility etc, if appropriate. The Visit Leader should resist any attempt by the airline to split the group between different aircraft.

Visits abroad can be made in a number of ways.

Organising your own visit

A Head Teacher/Manager or a Visit Leader may decide to organise a package abroad without the help of an outside body. Package organisers have responsibilities under directive 90/314/EEC. This is implemented in the UK by the Package Travel, Package Holidays and Package Tours Regulations 1992 (The Package Travel Regulations). These regulations apply to packages sold or offered for sale in the UK. They define a package as a combination of any two of accommodation, transport, or other tourist services not ancillary to transport. Most package arrangements come within the scope of the regulations unless they are 'occasional' or part of an educational course programme as compared with a leisure activity such as skiing.

Organising your own transport

Visit Leaders should ensure that drivers taking groups abroad are familiar with driving the coach or minibus in the countries being visited and those en route. EC regulations require the fitting and use of a tachograph and prescribe maximum limits on driving time and minimum requirements for breaks and rest periods. These regulations apply for most drivers of school/Young People's Service passenger vehicles when undertaking an international journey. Different licence requirements would normally apply for driving abroad.

Factors to consider when travelling abroad include:

- The need to be aware that different legislation and regulations may apply for drivers'

hours and record keeping purposes, particularly in non EU countries.

- EU drivers' hours and tachograph regulations normally apply to any vehicle with 9 or more passenger seats on journeys through EU countries and some countries outside the EU. In other countries, drivers must observe the domestic rules of the countries being visited. Advice on domestic rules may be obtained from the relevant embassies of the countries concerned.
- Special documentation is required for minibuses taken abroad.
- All group members should be aware of unfamiliar right-hand-drive traffic. The passenger doors on UK minibuses and coaches may not open on the kerb side in countries where travel is on the right hand side of the road. Extra care will be necessary when the group is climbing in and out of the vehicle. Detours may be necessary to ensure safety.
- Carrying capacity and loading requirements.

Using tour operators

Before using a tour operator, Visit Leaders should ensure it is reputable. Ascertaining this should form part of the risk assessment. The Civil Aviation Authority licenses travel organisers and tour operators selling air seats or packages with an air transport element (Air Organiser's Licence or ATOL). The licence is a legal requirement and provides security against a licence holder going out of business.

A travel agent does not need to be an ATOL holder if acting only as an agent of an ATOL holder. But, if so, the Visit Leader must check whether or not the whole package being supplied is covered by the ATOL. If it is not, the organiser must show evidence of other forms of security to provide for the refund of advance payments and the costs of repatriation in the event of insolvency.

Planning and preparation

It is good practice that an exploratory visit to the location should always be made. If this is not possible, the Visit Leader should gather as much information as possible on the area to be visited and the facilities available from:

- The provider.
- The Foreign and Commonwealth Office's Travel Advice Unit.
- Other schools/groups who have used the facilities or have been to the area.
- The local authority/schools in the area to be visited.
- National travel offices in the UK.
- Embassies/consulates.
- Travel agents/tour operators.
- The internet, books and magazines.

Paperwork

The Visit Leader should ensure that they obtain and take with them:

- Travel tickets, passports and visas. It is also advisable to carry a separate list of the numbers of any travel documents/passports, and photocopies of all the group's documents in a sealed waterproof bag.
- A copy of the contract with the centre/hotel etc, if appropriate.
- Medical papers eg EHIC and significant medical histories.
- Parental consent forms and permission for Visit Leaders to authorise emergency treatment on parental behalf.
- The phone numbers and addresses at home and in work, of the Head Teacher/Manager and of the home based contact.
- The names of parents and the addresses and telephone numbers at which they can be contacted (home and workplace).
- Copies of a list of group members and their details.
- Details of insurance arrangements and the company's telephone number.
- The name, address and telephone number of the group's accommodation.
- Location of local hospital/medical services.

The Visit Leader may wish to ask parents for passport size photographs of the young people. It might be useful to have photographs of the adults in the group as well.

Information retained at the school/centre

Full details of the visit should be retained at the school/centre while the visit is in progress. This should include:

- The itinerary and contact telephone number/address of the group.
- A list of group members and their details.
- Contact names, addresses, telephones numbers of the parents and next of kin.
- Copies of parental consent forms.
- Copies of travel documents, insurance documents, medical papers.
- A copy of the contract with the centre/hotel etc, if appropriate.
- LA emergency contact numbers.

It is the Head Teacher's/Manager's responsibility to ensure that this information is available at all times. This is particularly important if the visit takes place when the school/centre is closed.

Emergencies

The Visit Leader must ensure that all members of the group know what action to take if there is a problem.

The Visit Leader and supervisors should know where the nearest British Embassy or Consulate is located and their telephone numbers. Depending on the age of the participants, it may be appropriate to ensure that they have this information to hand.

It is advisable to have a staff member/contact at home with a valid passport, who could go to the area being visited to provide support to the group in the event of an emergency.

For further information, users of the guidance are recommended to read the OEAP NG document: [“Overseas Visits”](#).

In addition to the information in the above document, Sandwell MBC requires that at least two adults are Teachers or Senior Youth Workers.

Exchange visits

The success of an exchange visit largely depends on good relationships and communications with the partner school/centre.

Individual school/centre exchanges differ from other visits abroad in that young people will spend most of their time with host families and are, therefore, not always under the direct supervision of staff. Host families will not be subject to English law.

For further information, users of the guidance are recommended to read the OEAP NG document: [“Exchanges and Home Stays”](#).

29. Extended Services Activities

Where the document refers to the signature of the ‘Head Teacher’, the application form should be expanded to accommodate the signatures of all Head Teachers with pupils engaged in the activity(ies).

It is good practice for CoOP Co-ordinators to undertake EVC training, and, where appropriate, Visit Leader training to inform and support their role in organising and co-ordinating activities.

For the purposes of delivering extended services, CoOPs should pay particular attention to:

- Out of hours fire procedures, including changed exit routes, fire marshal etc.
- Inclement weather (for more info refer to SMBC policy)
- Risk Assessment for activities indoors
- First Aid out of hours
- Accessible toilets
- Safe handling and storing of equipment
- Natural hazards e.g. fauna and water
- Alternative plan B and plan C
- Emergency contact, including who will contact you and how they will contact you.
- Locking up procedures
- Lone ‘people’ working
- Transport arrangements
- Accident and illness procedures
- Emergency procedures
- Nominated deputy leaders
- Checking for individual sensitive issues, for example access issues, parents picking up children.
- Understanding / knowing the group e.g. medical needs, behavioural requirements

30. Children’s Centres

THIS SECTION RELATES TO CHILDREN'S CENTRES THAT ARE PART OF LOCAL AUTHORITY COMMUNITY SCHOOLS OR THOSE CENTRES THAT HAVE A SERVICE LEVEL AGREEMENT WITH SANDWELL EDUCATIONAL VISITS TEAM. If you are a Children's Centre that the above does not apply to and you would like to follow this policy please contact a member of the Educational Visits Team on 0121 569 8152 to discuss this further.

It is acknowledged that these procedures relate to two main elements of the operation of Children's Centres which fall under the category of 'non-residential off-site activities':

- a) Off-site activities by nursery, playgroup, crèche, where groups of children are being cared for by staff without their parents being present.

In these circumstances staff should:

- Add the visit to EVOLVE. This will automatically determine if the visit needs to have Local Authority approval.
- Utilise a One-Off Consent Form which can be used to cover regular local trips to parks etc or a Specific Consent Form for residential, adventurous or overseas visits.

- b) Off-site activities by the Centre where parents/carers accompany (and retain responsibility for) their child(ren).

In these circumstances the Centre will follow the procedures as noted in a) with the exceptions:

- Children should not go on these trips without their parent/carer. On rare occasions where it is deemed appropriate due to the individual circumstances a member of staff will be allocated to that child and will not form part of the general staffing of the trip.
- Staff should not take their own child on such trips.
- Volunteers who take their own children on trips cannot be counted as part of the general staffing.
- Where parents are participating in trips they should complete a consent/contact form so that leaders have basic information.

31. Sandwell Residential Education Service Centres

The information in this section is relevant to Plas Gwynant, Ingestre Hall, Frank Chapman Centre, Edgmond Hall and Malthouse Outdoor Activity Centre only.

Because these centres are owned and run by Sandwell MBC and staffed by Sandwell employees, some of the usual checks and risk assessments will have been carried out or will be carried out by the centre staff. This means that the Visit Leader will need to liaise with the centre in order to check the division of responsibility. This will largely depend on the type of work and activities to be undertaken during the visit.

The Visit Leader can be assured that:

- All centre staff are appropriately trained to supervise children with regard to child protection procedures.
- All centre staff are appropriately vetted.
- That there will be no need to check the centre accommodation's suitability (if applicable).
- Any equipment provided by the centre will be suitable for the purpose.

- Risk assessments on centre organised activities will be carried out by the centre.

The Visit Leader must:

- Ensure that the programme of activities to be carried out on the visit is agreed in advance with the centre including any potential modifications in the case of changed circumstances.
- Agree any division of responsibility between centre and school staff before the visit takes place, including responsibility for any risk assessments.
- Ensure that the children take suitable personal clothing as recommended by the centre.
- Make the appropriate EVOLVE application to ensure that the activity is approved by the Head Teacher/Manager and the LA notified of the visit
- Ensure appropriate transport arrangements including risk assessments.
- Inform parents in the normal way and collect duly completed consent forms.