

# **St Anthony's Educational visits policy 2017**

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## **Foreword**

by the Head Teacher – John Morgan

Education visits offer our children an invaluable opportunity to enrich their learning and help to raise their confidence and self-esteem. They can increase motivation, appetite for learning and raise levels of achievement.

Learning outside the classroom, visiting new areas and exploring new environments help to broaden our children's horizons and encourages an awareness of their own and other's abilities and needs. St. Anthony's school values and recognises the invaluable contribution of both the school and centre staff who lead and assist in such educational visits every year, and so help to enrich and extend the educational opportunities of all our children.

## **Summary of policy**

This school/establishment follows the LA procedures for educational visit planning, approval and monitoring by using the EVOLVE on line visit planning and approval system [www.flintshirevisits.org](http://www.flintshirevisits.org) for all visits run by school/establishment staff or volunteers.

This policy is reviewed (and updated as necessary) annually or following any accident / incident on an educational visit.

Staff planning an educational visit must ensure that they follow the procedures set out in this policy. Staff should also refer to and follow the relevant guidance (relating to the nature of the visit being planned) as set out in the Outdoor Education Advisers' Panel (OEAP) National Guidance for Educational Visits [www.oeapng.info](http://www.oeapng.info)

Queries relating to this policy should be directed to John Morgan , Educational Visits Coordinator (EVC).

# Section A

## FLINTSHIRE COUNTY COUNCIL

### Planning and Approval Procedures for Educational Visits

This document sets out the Flintshire County Council planning and approval procedures for Educational visits.

Anyone organising an off-site visit for young people from Flintshire County Council should also refer to and follow the relevant guidance (relating to the nature of the visit being planned) as set out in the Outdoor Education Advisers' Panel (OEAP) National Guidance for Educational Visits [www.oeapng.info](http://www.oeapng.info)

|            |                          |
|------------|--------------------------|
| Issue Date | 2016-2017                |
| Author     | Arwel Elias, Mike Rosser |
| Approved   |                          |

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## **Foreword**

Flintshire educational establishments have a rich and valuable tradition of providing exciting and enjoyable educational visits for young people from all walks of life.

Young people benefit enormously from taking part in visits – it gives them the opportunity to experience activities they may not otherwise have, helps them to develop important life skills, enhances the curriculum and can provide lifelong happy memories.

Staff also benefit from visits – improved staff to staff and young person to staff relationships, increased variety and interest in their work along with the professional development inherent in organising and leading visits.

This document sets out planning and approval procedures that aim to help staff in the Children and Young People's Service to plan and deliver high quality and safe external visits – be it a regular visit to a local park or a three week trek in a remote rain forest. By following these procedures, staff involved in the planning and delivery of visits will be supported by the Local Authority in the unlikely event of an incident.

I should like to take this opportunity to express my gratitude to the staff in Education & Youth Portfolio whose dedication, commitment and professionalism ensures that young people across the County are given the opportunity to take part in such beneficial educational visits. These procedures are primarily aimed at supporting them in this valuable work.

**Ian Budd**

**Chief Officer, Education & Youth**

**Date: August 2016**

## **Summary of procedures**

This document sets out the procedures by which Flintshire County Council and its educational establishments meet the standards set out in the OEAP *National Guidance for Educational Visits, recognised as best practice* by the Welsh Government.

### **The role of the Educational Visit Coordinator**

A key element of these procedures is that each school/establishment has a competent **Educational Visit Coordinator (EVC)** who has completed the county EVC training course. Due to the nature of the role the EVC must be an experienced member of staff:

- who is part of, or able to influence, the Senior Management Team;
- with sufficient authority to make a judgement call about the competence of any other staff member to lead an off-site visit and to approve or decline visits planned by any staff member;
  - have a suitable background in education or youth work;
  - have a firm knowledge in the organisation and planning of off site visits.

The EVC is the routine contact for dialogue with the LA Outdoor Education/Educational Visits Adviser. Unless explicitly delegated to an EVC, these responsibilities would rest with the Head who would need to complete the EVC training course.

The functions of the EVC are to:

- Ensure that all visits are planned and approved in accordance with this policy;
- Support the Head and Governors with approval decisions;
- Assign competent people to lead or otherwise supervise a visit;
- Carry out occasional monitoring of visit leaders to identify further training needs;
- Work with the visit leader to provide parents/carers with information about the visit and obtain the necessary consent from parent/carers;
- Ensure emergency arrangements and contacts are in place for each visit;
- Keep records of individual visits including what worked well, what didn't and any accident/incident reports.

**The Head teacher (Schools) or Head of establishment (non-schools) has responsibility to ensure that any changes to their EVC is notified to the Outdoor Education Advisor so that he or she can take steps to train their replacement as soon as practicable.**

**EVC queries relating to these procedures should be directed to:**

**Name and contact details of school EVC Co-ordinator John Morgan**

**Phone: 01244 680480**

**Mobile: 07938 581755**

**Email: [sahead@hwbcymru.net](mailto:sahead@hwbcymru.net)**

**Local Authority (LA) leader approval, LA approval or notification for visits, EVC training and general advice about off site visits and adventure activities**

Mike Rosser,  
Education Visits Advisor  
Nant BH Outdoor Education Centre, Llanrwst  
Conwy  
LL27 0JB  
(01492) 643083  
[mike.rosser@conwy.gov.uk](mailto:mike.rosser@conwy.gov.uk)

**Accidents, Incidents and General Advice relating to Health and Safety (Flintshire)**

Corporate Occupational Health and Safety Advisor  
Llwynegrin Hall  
County Hall  
Mold  
CH7 6NG  
(01352) 702782  
Email: [Corporate.Health.&.Safety@flintshire.gov.uk](mailto:Corporate.Health.&.Safety@flintshire.gov.uk)

# Visit approval/notification procedures

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## 1 Approval and notification system for all visits

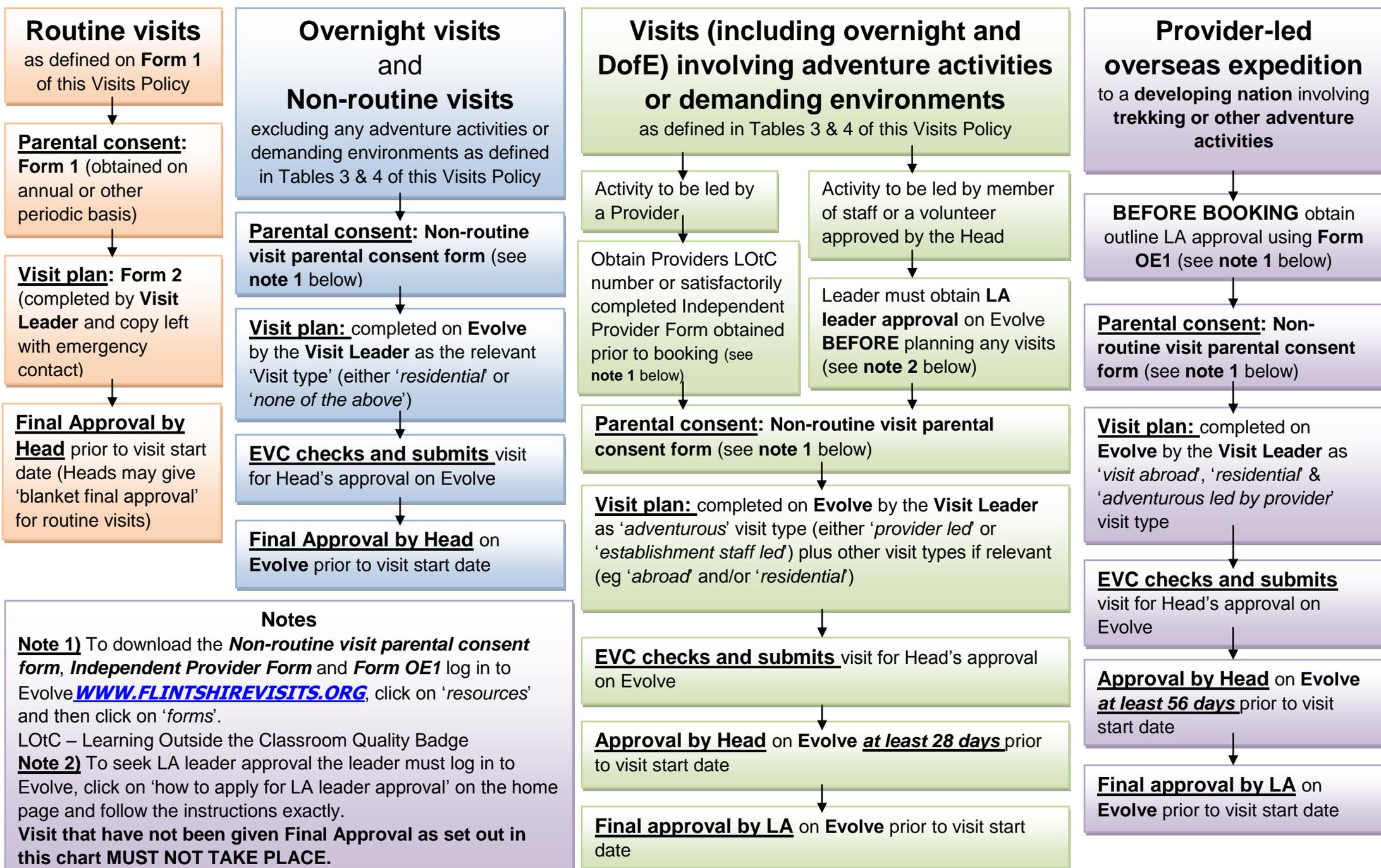
All visits must be approved as set out in Table 1 below and a record of the visit kept as set out in 'Record keeping' section of this policy (see 8 below). All relevant forms can be found in section 4 of the policy and on Evolve [www.flintshirevisits.org](http://www.flintshirevisits.org) In the resources section

**Table 1 - Planning / approval required for different types of visit**

| Visit type  | Approval/notification required  |
|---|---|
| <b>Routine visits</b> (as defined on form 1 of this policy)   | <b>Planning</b><br>Visit planned on form 2 (routine visit planning form)<br><b>Approval</b><br>By the Head <b>before the visit takes place</b> (Heads may give blanket approval for a member of staff to lead routine visits)   |
| <ul style="list-style-type: none"> <li>• <b>Non-routine visits</b></li> <li>• <b>Overnight visits</b></li> </ul>  | <b>Planning</b><br>Visit planned using the EVOLVE system <a href="http://www.flintshirevisits.org">www.flintshirevisits.org</a><br><b>Approval</b><br>By the Head on the EVOLVE system <b>before the visit takes place.</b><br><b>Visits that have not been approved by the Head on the Evolve system MUST NOT TAKE PLACE.</b>  |
| A visit involving any of the following elements: <ul style="list-style-type: none"> <li>• <b>Demanding environments</b> (as defined in Table 3 below)</li> <li>• <b>Adventure activities</b> (as defined in table 4 below)</li> </ul> | <b>Planning</b><br>Visit planned using the EVOLVE system <a href="http://www.flintshirevisits.org">www.flintshirevisits.org</a><br><b>Approval</b><br>Approved by the Head on the EVOLVE system <b>at least 28 days before visit start date.</b> LA approval required – Evolve automatically applies for this after the Head approves the visit using their PIN number.<br><b>Visits that have not been approved by the LA on the Evolve system MUST NOT TAKE PLACE.</b><br><i>[Note: staff-led adventure activities / demanding environment trips– the staff member must gain LA leader approval on Evolve before planning a trip – they apply for this by clicking on 'My profile' and then training and awards on the home page of evolve and then follow the instructions.]</i> |
| <b>Overseas expedition</b> organised through an independent provider ( <i>i.e. expedition to a developing country involving trekking or other adventure activities</i> )  | <b>Planning</b><br>Visit planned using the EVOLVE system <a href="http://www.flintshirevisits.org">www.flintshirevisits.org</a><br>LA Approval is in two stages: <ul style="list-style-type: none"> <li>○ Initial approval before booking using form OE1 (available on Evolve by clicking on 'guidance and resources' and then 'forms')</li> <li>○ Final approval on the Evolve system at least 8 weeks before the visit</li> </ul> <b>Visits that have not been approved by the LA on the Evolve system MUST NOT TAKE PLACE.</b>   |
| <b>Duke of Edinburgh Award expedition</b>   | <b>Planning</b><br>Visit planned using the EVOLVE system <a href="http://www.flintshirevisits.org">www.flintshirevisits.org</a><br><b>Approval</b><br>Approved by the Head on the EVOLVE system <b>at least 28 days before visit start date.</b> LA approval required – Evolve automatically applies for this after the Head approves the visit using their PIN number.<br><b>Visits that have not been approved by the LA on the Evolve system MUST NOT TAKE PLACE.</b><br><i>[Note: staff-led adventure activities / demanding environment trips– the staff member must gain LA leader approval on Evolve before planning a trip – they apply for this by clicking on 'MY PROFILE' AND THEN TRAINING AND AWARDS on the home page of evolve and then follow the instructions.]</i> |



**Table 2. Flowchart: Planning / approval required for different types of visit**



**Routine visits**  
as defined on Form 1 of this Visits Policy

**Parental consent: Form 1** (obtained on annual or other periodic basis)

**Visit plan: Form 2** (completed by Visit Leader and copy left with emergency contact)

**Final Approval by Head** prior to visit start date (Heads may give 'blanket final approval' for routine visits)

**Overnight visits and Non-routine visits**  
excluding any adventure activities or demanding environments as defined in Tables 3 & 4 of this Visits Policy

**Parental consent: Non-routine visit parental consent form** (see note 1 below)

**Visit plan:** completed on Evolve by the Visit Leader as the relevant 'Visit type' (either 'residential' or 'none of the above')

**EVC checks and submits** visit for Head's approval on Evolve

**Final Approval by Head** on Evolve prior to visit start date

**Visits (including overnight and DofE) involving adventure activities or demanding environments**  
as defined in Tables 3 & 4 of this Visits Policy

Activity to be led by a Provider

Obtain Providers LOtC number or satisfactorily completed Independent Provider Form obtained prior to booking (see note 1 below)

**Parental consent: Non-routine visit parental consent form** (see note 1 below)

**Visit plan:** completed on Evolve by the Visit Leader as 'adventurous' visit type (either 'provider led' or 'establishment staff led') plus other visit types if relevant (eg 'abroad' and/or 'residential')

**EVC checks and submits** visit for Head's approval on Evolve

**Approval by Head** on Evolve **at least 28 days** prior to visit start date

**Final approval by LA** on Evolve prior to visit start date

Activity to be led by member of staff or a volunteer approved by the Head

Leader must obtain **LA leader approval** on Evolve **BEFORE** planning any visits (see note 2 below)

**Provider-led overseas expedition**  
to a developing nation involving trekking or other adventure activities

**BEFORE BOOKING** obtain outline LA approval using **Form OE1** (see note 1 below)

**Parental consent: Non-routine visit parental consent form** (see note 1 below)

**Visit plan:** completed on Evolve by the Visit Leader as 'visit abroad', 'residential & 'adventurous led by provider' visit type

**EVC checks and submits** visit for Head's approval on Evolve

**Approval by Head** on Evolve **at least 56 days** prior to visit start date

**Final approval by LA** on Evolve prior to visit start date

**Notes**

**Note 1)** To download the **Non-routine visit parental consent form**, **Independent Provider Form** and **Form OE1** log in to Evolve [WWW.FLINTSHIREVISITS.ORG](http://WWW.FLINTSHIREVISITS.ORG), click on 'resources' and then click on 'forms'.  
LOtC – Learning Outside the Classroom Quality Badge

**Note 2)** To seek LA leader approval the leader must log in to Evolve, click on 'how to apply for LA leader approval' on the home page and follow the instructions exactly.  
**Visit that have not been given Final Approval as set out in this chart MUST NOT TAKE PLACE.**

### Table 3. Definition of demanding environments.

**Important note:** classification of locations is subjective. Visit leaders who are unsure of whether or not a location requires LA approval can seek clarification from their Educational Visits Coordinator (EVC).

| Location                      | Definition  | Level of approval required   |
|-------------------------------|---|--|
| <b>Normal countryside</b>     | Areas; <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>  | Visits here <b>do not</b> require LA approval  |
| <b>Demanding environments</b> | Areas where there is significant risk to the group from <b>one or more</b> of the following factors; <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> | Visits here <b>do</b> require LA approval (except activities run by the LA's Outdoor Education Centres – Nant BH, Nantyr and Pentrellyncymer). |

## Table 4. Adventure activities

**Important note:** This list is not exhaustive. Any visit leader unsure of whether or not an activity should be classified as an adventure activity should seek the advice of their Educational Visits Coordinator (EVC).

| Land Based Activities  | Water Based Activities                                |
|--|---|
| Rock climbing/abseiling including climbing walls   | Kayaking and canoeing                                 |
| Mountaineering   | Sailing and windsurfing                               |
| Hill walking   | White water rafting                                   |
| Ice climbing   | Waterskiing   |
| Gorge or coastal scrambling/sea cliff traversing/coasteering   | Snorkel and aqualung diving                           |
| Underground exploration – cave or mine   | All forms of boating (excluding commercial transport) |
| Skiing (snow/dry slope)  | Improvised rafting                                    |
| Air activities (except commercial flights)   | Kite surfing  |
| Horse riding and pony trekking   | Surfing and body boarding                             |
| High ropes courses and zip wires   | Dragon boating  |
| Quad biking/ATV's  | Wave skiing   |
| Orienteering   | Jet skiing/personal water craft                       |
| Mountain biking  | SUP- Stand-up Paddle Boarding                         |
| Paint-Balling  |   |
| Any activity ( <b>including camping, fieldwork and non-adventure activities</b> ) taking place in demanding environments as defined in Table 3 above |   |

## 2 Blanket approval

Blanket approval may be given:

- by Heads for staff to run routine visits
- by the LA for those staff who have gained LA leader approval (see 3 below)

For visits that have been given blanket approval, the visit leader and EVC must ensure that relevant information is left with the school/establishment emergency contact including details of the venue, activity, group, transport, start/finish times and other relevant information for **each** visit.

## 3 Joint visits / visits planned with or by another establishment or organisation

Any visit or activity involving young people from your school/establishment or where young people have been recruited through your school/establishment should be treated as one of your school/establishment visits **even if another school/establishment or external provider is taking the lead role in organising the visit.** Examples include:

- Sports fixtures/tours where your school/establishment has made young people/parents aware of the opportunity but where the tour is being staffed by other adults (e.g. sports coaches, Local Authority staff, Urdd staff, PTA Groups or similar)
- Collaborative visits with another school/establishment

- DofE Expeditions where young people from your establishment are joining another establishment's expedition

For these visits, the young person's EVC and Head **must be able to evidence that they have:**

- Ensured that all aspects of planning for the visit meet the County requirements for visit planning and approval (another school/establishment may carry out this planning and approval if they are taking the lead role but if this is the case, the visit plan must include all young people and staff attending the visit from all schools/establishments involved and you must view and approve the visit plan)
- Been sufficiently involved in planning for the visit to ensure that the risk management and pastoral care arrangements (including an appropriate level of 24/7 supervision) are appropriate for the young person/people attending from their establishment
- Checked that the planned activities are appropriate for the young people from their establishment
- Ensured that parents are made aware of the arrangements for supervision and the activities planned and have given their consent to this
- Satisfied themselves that any activities being provided are being delivered by a suitably competent and insured activity provider or leader
- Satisfied themselves that the staff leading the visit are competent to do so e.g. confirmation by another school / establishment Head
- Ensured that the supervisory staff for the visit are made aware of any relevant additional needs (including medical/dietary/behavioural) for the young people taking part from their establishment
- Ensured that appropriate support will be provided by the visit leaders to manage any additional needs effectively
- Ensured that they can be contacted in the event of an incident, accident or other emergency

#### 4 **Parent / carer consent**

Informed parent/carers consent must be obtained for all visits. For routine visits (those listed on form 1), blanket consent is obtained.

For non-routine visits (not listed on form 1) consent is obtained for each visit (or series of repeated visits) using a non-routine visit parental consent form. An example of a non-routine visit parental consent form can be obtained from the Evolve system by clicking on 'guidance and resources' and then 'forms'.

If parents/carers withhold their consent the young person must 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/carers give a conditional consent the Head will need to consider whether the young person may be taken on the visit or not.

#### 5 **Using an Independent Provider – pre-booking checks**

For **any** off-site visit, the visit leader should check that the location and activities offered are educationally suitable for the group and will meet the aims of the visit. Check that any provider offers good value for money by comparing with other similar providers. Remember that there is no substitute for firsthand, up to date information. This level of pre-booking check is sufficient for visitor attractions and public access venues such as zoos, historical/cultural sites, museums, sports stadia, theatres, cinemas, hotels, bowling alleys, ice rinks, theme parks and public access (lifeguarded) swimming pools or similar. This level of check is also sufficient for the Local

Authority's own Outdoor Education Centres at Nant BH, Nantyr and Pentrellyncymer.

When using a specialist venue or activity provider e.g. outdoor activity provider (other than the LA's own Outdoor Education Centres at Nant BH, Nantyr and Pentrellyncymer), farm visit or similar please apply the following guidance **before signing any booking form or contract**:

Ask the provider to either provide their **LOtC quality badge (Learning Outside the Classroom Quality Badge)** accreditation or complete the **Independent Providers' Questionnaire** (which can be downloaded from the EVOLVE system's Guidance and Resources/Forms section) and check that this has been satisfactorily completed by the provider **before you book**. This requires them to confirm that they have risk assessments in place for all activities/services that they provide and that these are available to view at the premises on request. **Please note that there is no need to obtain copies of the provider's risk assessments.** Seek specialist advice on any concerns arising from the provider's responses by contacting your LA Outdoor Education Adviser.

**Special arrangements for Overseas expeditions** (*i.e. expeditions to developing countries involving trekking or other adventure activities*)

Initial LA approval must be obtained before booking. Initial LA approval can be sought by completing and sending form OE1 (along with attachments listed on Form OE1) to the Outdoor Education Adviser at the address listed on Form OE1. Form OE1 can be downloaded from the EVOLVE system's Guidance and Resources/Forms section [WWW.FLINTSHIREVISITS.ORG](http://WWW.FLINTSHIREVISITS.ORG). Final LA approval for the expedition must be obtained on the Evolve system at least 8 weeks before the expedition start date.

## 6. Traveling Abroad

Due to the recent events a heightened state of vigilance continues to be required for all foreign travel visits. FCO advice and is not currently advising that future travel should be cancelled. Parental concerns should be respected but if consent to travel is withdrawn it is unlikely travel insurance policies would cover any financial losses incurred.

### Overseas Visits and Travel

Schools should consider the following points in relation to any visit:

- Headteachers, Visit Leaders and accompanying staff should refresh their current knowledge of the OEAP overseas visits guidance, review their visit itinerary and risk assessments (e.g. keep movement around large cities at least to a minimum) to ensure the Visit Leaders remain confident in running the trips.
- The UK Government has provided specific advice for travel abroad. The general principles within this guidance should be considered for any off-Island visit.
- Visit staff should watch the Stay Safe video and ensure they are aware of the emergency number(s) in the relevant country(ies).
- Before and during any visit abroad, the FCO website, <https://www.gov.uk/foreign-travel-advice> should be regularly checked for the country/ies being visited or transited.

## 7. Local Authority (LA) leader approval

### Who needs LA leader approval?

LA or school employees or volunteers who wish to lead in any of the demanding environments or adventurous activities for which LA approval is required must first be confirmed as technically competent to lead by the Outdoor Education Adviser.

Prospective leaders must seek LA leader approval through their own Evolve log-in via the '**My details/awards**' section. In order to be granted approval the applicant must have all of the following:

- **Either** a) the relevant National Governing Body (NGB) leadership award for the terrain/activity **or** b) have a written and signed statement of competence by an appropriate technical adviser verifying that the leader has the relevant technical and group management skills for the terrain/activity (see below for how to arrange technical adviser approval).
- Recent and relevant experience
- A current first aid certificate or qualification
- Support of the Head

[To arrange technical adviser approval the EVC 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.]

Depending on depth of experience and technical skill, leaders may be given 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.

The Outdoor Education Adviser will notify the individual and their EVC of their LA leader approval decision and this will be recorded in the individual's '**My details**' section of the EVOLVE system. This can be viewed at any time by the individual, their EVC or Head.

## **8. Special arrangements for DofE Award groups**

Anyone planning a DofE Award expedition/ activity must first contact the LA DofE Award Officer before starting any planning for the activity to ensure that the Expedition meets the requirements of the DofE and Local Authority.

County D of E Worker  
c/o Youth and Community Service  
County Hall  
Mold  
Flintshire  
CH7 6ND  
[youthservice@flintshire.gov.uk](mailto:youthservice@flintshire.gov.uk)  
Tel: 01352 704032

### **NOTE:**

**Expedition supervisors who currently do not hold a formal leadership award must obtain the relevant leadership award (or Technical Advisor statement of competence) for the terrain in which they wish to supervise by **March 31st 2017****

## DofE expedition supervisor: minimum leadership competence

**Important note:** expedition supervisors who currently do not hold a formal leadership award **must** obtain the relevant leadership award (or Technical Advisor statement of competence) for the terrain in which they wish to supervise by **March 31st 2017** and should complete the training course for the award by **January 1st 2017**.

Please note that this table shows leadership awards for the named **supervisor** for DofE expeditions **on foot**. Large expeditions involving multiple expedition groups will require more than one supervisor to manage safety of groups and assistant supervisors effectively. Please contact [mike.rosser@conwy.gov.uk](mailto:mike.rosser@conwy.gov.uk) to discuss the relevant leadership awards for other modes of travel.

The supervisor may delegate appropriate tasks (but not accountability which remains with the supervisor) to one or more **assistant supervisors**. Delegated tasks must lie within the capabilities of the assistant supervisor based on their knowledge, experience and competence. Assistant supervisors do not have to hold a formal leadership award (although it is good practice for them to have completed training in the award and be moving towards assessment).

| Terrain             | Description  | Minimum Leadership award  | First aid requirements  |
|---------------------|--|---|---|
| Lowland countryside | Lowland countryside and forest in the UK in non-winter conditions. | <ul style="list-style-type: none"> <li>• <b>Lowland Leader Award with Expedition Module</b></li> <li>OR</li> <li>• Certificate or Award in Basic Expedition Leadership</li> <li>OR</li> <li>• Written statement of competence by an independent Technical Advisor*</li> </ul> | <ul style="list-style-type: none"> <li>• Current 2 day (16 hour) first aid course [outdoor leadership-related course (such as REC) highly recommended]</li> </ul> |
| Hill and moorland   | Hill and moorland in the UK in non-winter conditions.              | <ul style="list-style-type: none"> <li>• <b>Hill and Moorland Leader Award with Expedition Module</b></li> <li>OR</li> <li>• Walking Group Leader Award</li> <li>OR</li> <li>• Written statement of competence by an independent Technical Advisor*</li> </ul>                | <ul style="list-style-type: none"> <li>• Current 2 day (16 hour) first aid course [outdoor leadership-related course (such as REC) highly recommended]</li> </ul> |
| Mountain            | Mountains in the UK in non-winter conditions.                      | <ul style="list-style-type: none"> <li>• <b>Mountain Leader Award (summer)</b></li> <li>OR</li> <li>• Written statement of competence by an independent Technical Advisor*</li> </ul>   | <ul style="list-style-type: none"> <li>• Current 2 day (16 hour) first aid course [outdoor leadership-related course (such as REC) highly recommended]</li> </ul> |

\*Whilst it is highly recommended that supervisors gain the relevant leadership award, a statement of competence by an independent Technical Advisor who is approved by the employer can be used to demonstrate competence. Supervisors considering this option must first ensure that the Technical Advisor is approved / recognised by their employer by contacting the Educational Visits Advisor to discuss [mike.rosser@conwy.gov.uk](mailto:mike.rosser@conwy.gov.uk)

To find a Lowland Leader, Hill and Moorland Leader or Mountain Leader training or assessment course go to [www.mountain-training.org](http://www.mountain-training.org)

For the Certificate or Award in Basic Expedition Leadership go to [www.sportsleaders.org/courses/qualifications/qcf/level-3-certificate-in-basicexpedition-leadership/](http://www.sportsleaders.org/courses/qualifications/qcf/level-3-certificate-in-basicexpedition-leadership/)

## 9. LA approval decisions for visits

Confirmation of the approval decision for a visit will be given via the EVOLVE system. **Visits that require LA approval must not proceed until this approval has been given.**

Where further information or elements of the (OEAP) National Guidance for Educational Visits have not been met, approval will be withheld until these conditions are met. Confirmation of this decision will be sent to the EVC/Head via the EVOLVE system.

## 10. Record keeping

### Routine visits

A copy of the completed *Form 2: Routine visit planning form* should be kept on file for 5 years for each routine visit (electronic file storage or hard copy are both acceptable).

### Visits planned on Evolve (non-routine visits)

The EVOLVE system acts as a record for any visit planned and approved on the system. Schools/establishments therefore only need to retain the following details for any particular visit:

- List of participants
- Parental consent forms (NOTE: these can be destroyed 3 months after the visit if no accidents or incidents have been reported)
- Where an accident or incident has been reported the school/establishment should retain the parental consent form for the pupil(s)/young person(s) involved.
- If there has been an accident/incident on a visit, schools/establishments must ensure that the LA is notified according to LA procedures. The LA will keep accident/incident records until the young person reaches age 21 (or for 3 years in the case of an adult). Schools/establishments therefore do not need to retain records of accident/incidents reported to the LA unless they wish to do so for their own purposes. If a visit leader or school/establishment receives notification of a claim they should not respond directly but should pass the details to the LA claims manager/insurance section.

In addition, schools/establishments should archive in the school/ establishment 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 5 years after which it may be destroyed.

## **11. Monitoring**

### Internal monitoring by the Head/EVC

The Head/EVC must monitor visit leaders from time to time to ensure compliance with school/establishment policy.

Monitoring by the Head/EVC 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/establishment.

### Monitoring by the LA

The LA will monitor schools/establishments on a 5 year cycle to ensure compliance with LA guidance. The LA will contact EVCs to notify them of an upcoming monitoring visit.

## **12. 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/or EVCs.

# Planning forms

|          |  |
|----------|--|
| Form 1:  | Parent/carer consent form: routine visits                |
| Form 2:  | Routine visits: planning form                            |
| Form 3:  | Summary of information about participants                |
| Form 4 : | Emergency action flowchart for visit leaders             |
| Form 5:  | Emergency action flowchart for base (emergency) contacts |
| Form 6:  | Incident record form                                     |

## **IMPORTANT NOTE:**

Other relevant planning forms that are updated regularly by the LA and are therefore not included here can be obtained from the Evolve system [www.flintshirevisits.org](http://www.flintshirevisits.org) by **clicking on 'resources'** and then 'forms'. These include:

- Parent/carer consent form for non-routine visits
- Remission of fees claim form
- Overseas expedition planning forms
- Visit evaluation form
- Independent Provider form

**Form 1**

**Parent/carer consent  
Routine visits**

*As part of your child's learning experience we provide a wide range of educational visits to support the curriculum. Please read, complete and return this form to give consent for your child to participate in all routine visits during their time at **St Anthony's** as defined below.*

Routine Visits include :

- Swimming
- Library visits
- Local walks

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

- Buckley Baths
- Saltney Library
- Saltney local area

**Your Child's Name:** \_\_\_\_\_

**Your Child's Date of Birth:** \_\_\_\_\_

**Your Contact Details :**

Telephone Home: \_\_\_\_\_ Work: \_\_\_\_\_

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

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

**Alternative Emergency Contact**

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

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

**Medical Information:**

Details of any medical, physical or psychological condition that may affect your child during a routine educational visit:

\_\_\_\_\_

Details of any medication that your child should take during a visit:

\_\_\_\_\_

Does your child self-administer the above medication? **YES / NO**

*It is the parent's responsibility to ensure that medication which should be carried by your child is taken with them on the visit. In some circumstances failure to carry the appropriate medication may result in your child not being able to go on the trip. This is entirely for your child's safety.*

**Dietary Requirements:**

Does your child have any special dietary requirements ?      **YES / NO**

---

Do you have any other information that might be important for us to know about?

---

**Family Doctor**

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

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

**I understand that:**

- routine visits will normally take place within the school's working hours. Occasionally, they may extend beyond this time, in which case I will be given adequate notice to allow me to make appropriate arrangements for my child's return home;
- my specific permission will be sought for any non-routine visits beyond those listed.
- 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 discipline procedures during the visit;
- I must inform the school of any change to my child's medical, physical or psychological condition that may affect my child during a routine educational visit.
- my child is covered by the County Council'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. I understand that this insurance policy does not include personal accident or personal belongings cover, for my child and I may wish to arrange this privately.
- I agree to inform the school of any changes to my details, or my child's home/contact details in order for the school to reach me in case of emergency.

**Full Name of parent/carer:** (print please) \_\_\_\_\_

Signed: \_\_\_\_\_ date: \_\_\_\_\_

**Form 2****Routine visits – planning form**  
Visit leader to complete and leave with emergency contact

|  |  |                         |  |
|--|--|-------------------------|--|
| Purpose of visit/<br>series of visits                          |  |                         |  |
| Visit leader   |  | Visit location (s)      |  |
| Start date and time  |  | Return date and<br>time |  |
| Mobile phone<br>number (s) carried<br>by staff on visit        |  | Transport used          |  |
| Activity/activities (or<br>attach programme)                   |  |                         |  |
| Other staff/adult<br>helpers (or attach<br>list to this sheet) |  |                         |  |

**Are there any significant risks** above and beyond those listed in our standard risk management procedures (Section B of our Educational Visits Policy)?

**No / Yes (delete as appropriate)**

(If yes please complete the table below)

| <b>Additional Risks</b> | <b>Additional safety measures</b> |
|-------------------------|-----------------------------------|
|                         |                                   |

**Form 3****Summary of information about participants (young people and adults)**

| <b>Surname</b> | <b>Forename(s)</b> | <b>Date of birth</b> | <b>Address</b> | <b>Next of kin</b> | <b>Contact number(s)</b> | <b>Relevant special needs/behaviour/medical information</b> |
|----------------|--------------------|----------------------|----------------|--------------------|--------------------------|---|
|                |                    |                      |                |                    |                          |   |

**Form 4**

**Emergency action flowchart for visit leaders**

*This flowchart must be available to all visit leaders taking part in the visit*

**Do not speak to the media – direct all media enquiries to Flintshire County Council  
Corporate Communications Officer Office Hours 01352 702112/Out of Hours 07557 996268  
(Personal Mobile – Press Officer)  
For further information on handling emergencies refer to LEA Managing School Emergencies  
Policy**

Give first aid if necessary. Make sure the rest of the group are accounted for and looked after.

Can you deal with the incident yourself?

No

Yes

False alarm involving callout of the Emergency Services

Is this a Critical Incident which requires the emergency services?

Inform your Base Emergency Contact as soon as possible

Yes

No

Call emergency services 999 or 112 and answer the operator's questions about the incident

Call your school/establishment Base Emergency Contact 01244 680480 (during school/establishment hours) 01745 852985 (out of school/establishment hours).  
Answer Base Emergency Contact's questions about the incident (as set out on Form 5 and 6).  
  
In the event of a Critical Incident or serious incident that can't be dealt with by yourself and where your Base Emergency Contact is not contactable contact the LA on: **0700 770152 (24 hrs)**

Follow instructions given by emergency services (if applicable) and / or Base Emergency Contact  
Continue to monitor group to minimise risk of any further incidents  
Stay near a phone to handle further calls from Emergency services or Base Emergency Contact

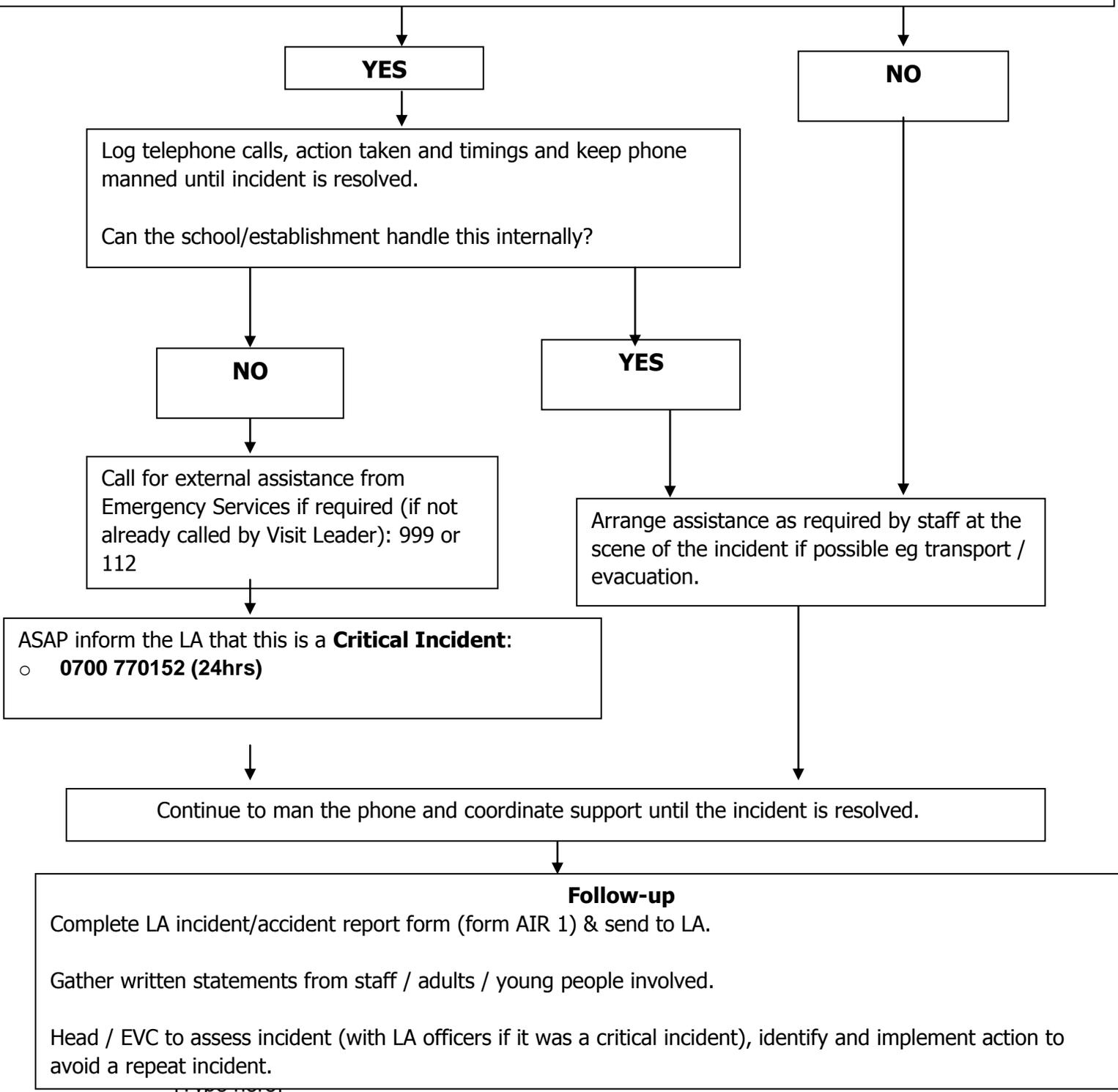
**Emergency action flowchart for the school's / establishment's Base Emergency Contact**

*This flowchart must be available to the school/establishment office **and** the nominated Base Emergency Contact for each visit*

Record information on Form 6 *Educational Visits: initial incident notes.*

Do not speak to the media – direct all enquiries to LA Corporate Communications Manager

Office Hours 01352 702112 Out of Office Hours 07557 996268 (Personal Mobile – Press Officer)



**Follow-up**

Complete LA incident/accident report form (form AIR 1) & send to LA.

Gather written statements from staff / adults / young people involved.

Head / EVC to assess incident (with LA officers if it was a critical incident), identify and implement action to avoid a repeat incident.

**Form 6****Educational Visits: initial incident notes**

NB This form can be used by the Base Emergency Contact (or LA call handler) to take rough notes during the period that they are handling an emergency call. The EVC must ultimately ensure that the LA incident/accident reporting procedures (form AIR 1) are completed as soon as possible after the incident.

Name and role of person making the emergency call\_\_\_\_\_

\_\_\_\_\_

Contact number(s) for person making call\_\_\_\_\_

Name and number of Base Emergency Contact (if different from above) \_\_\_\_\_

\_\_\_\_\_

Name of group's school/establishment\_\_\_\_\_

Number in group and age range\_\_\_\_\_

Name(s) of any lost or injured individuals(s)\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Time and date of incident\_\_\_\_\_

Location of incident\_\_\_\_\_

Activity taking place at the time\_\_\_\_\_

Vehicles involved (if applicable)\_\_\_\_\_

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

Form completed by\_\_\_\_\_ Date\_\_\_\_\_

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## Section B

## 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.

### Risk management form: All off site visits

| <b>Significant hazards and harm which may occur</b> | <b>Who might be harmed?</b> | <b>Safety measures:</b><br><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<br>Ensure staff are placed at front, middle and rear of children.<br>Pupils to walk in pairs or single file.<br>Members of staff to choose safe place to cross roads (if not using recognized pedestrian crossing)<br>2 members of staff to stand in road with children walking between.  |
| Weather conditions                                  | Pupils/staff                | Check weather forecast prior to visit<br>Brief pupils/parents of possible weather conditions prior to visit<br>Ensure appropriate clothing/footwear is worn or taken bearing in mind Summer and Winter conditions<br>Check with parents that it is OK to put sun cream on children<br>Take spare clothes for children not suitably prepared<br>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<br>Brief pupils/staff of possible areas where trips, slips and falls may occur<br>Ensure First Aid kit is carried by visit leader<br>Ensure any medical conditions of pupils are disclosed prior to visit   |
| Transport to and from venues                        | Pupils/staff                | Ensure recognized LA bus company is used<br>Ensure seat belts are worn at all times and are checked by visit leader  |

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|  |                  |  |
|--|------------------|--|
| Stranger danger  | Pupils           | Ensure children are made aware not to walk off with an unknown adult unless given specific instruction by visit leader.<br>Regular head counts<br>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<br>Check weather forecast for day of visit<br>Brief pupils and staff not to go near water's edge   |
| Shark fishing  | All              | Wear shark-proof swimming costume<br>Swim away quickly if one attacks  |
| Accident/emergency   | Staff pupils     | Follow emergency procedure guidelines carried by visit leader<br>Ensure suitable staff helper (in addition to visit leader) understands emergency procedure<br>Brief children of what to do in an emergency and how to summon help   |
| Getting lost/separated from group (outdoor venues)           | Staff            | Regular headcounts<br>Ensure pupils are to stay in small groups<br>Ensure staff accompany pupils at all times<br>Brief pupils to stay put if lost or separated and to shout for attention<br>Ensure all pupils know name of visit leader, staff and school/establishment name  |
| Getting lost/separated from group (indoor venues)            | Staff            | Regular headcounts<br>Ensure pupils are to stay in small groups<br>Ensure staff accompany pupils at all times<br>Brief pupils to stay at venue if lost or separated never to leave the premises<br>Brief children to make their way to reception<br>Ensure all pupils know name of visit leader, staff and school/establishment name |
| Medical Conditions   | Pupils           | Ensure medical conditions are disclosed prior to visit<br>Ensure consent is given for staff member to administer medicine if required<br>Ensure medicines, epi pens, inhalers, etc are carried by visit leader<br>Ensure at least one staff member/adult volunteer knows how to administer medicine if required.                     |
| Walking in local countryside                                 | pupils           | Brief pupils and helpers of proposed route<br>Brief pupils of appropriate behaviour<br>Ensure member of staff at front, middle and rear of pupils<br>Ensure correct clothing and footwear is used  |

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|  |                         |   |
|--|-------------------------|---|
| <p><b>Farm Visits</b><br/>Machinery, vehicles, risk of allergy, contamination, bites, kicks, etc</p> | <p>Pupils and staff</p> | <p>Brief pupils to stay out of way of machinery/vehicles and to follow supervision by farm staff<br/>Ensure parents have informed staff prior to visit of possible allergies<br/>Ensure medicines are carried by visit leader (if required)<br/>Brief children not to touch animals unless safe to do so<br/>Ensure pupils/staff are made aware of farm rules, reinforced by farm staff<br/>Ensure all eating is done in hygienic locations<br/>Ensure children wash hands before eating<br/>Make sure First Aid kit is carried</p> |
| <p><b>Castle visits</b><br/>High walls – falls<br/>Steep, dark stairs - falls</p>                    | <p>Pupils and staff</p> | <p>Visit leader knows venue and specific areas of risk in the castle (following recce)<br/>Brief other staff<br/>Supervise pupils appropriately</p>   |

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

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