

STOKE COLLEGE

EDUCATIONAL VISITS POLICY

At Stoke College we encourage staff to organise and run educational trips as it is strongly felt that this offers pupils the opportunity of learning within an environment other than in the classroom and provides new and challenging experiences that are essential for their development. This policy is applicable to all pupils in the school including boarders and children in the EYFS. This policy will follow the advice contained in *Health and Safety Advice on Legal Duties and Powers for Local Authorities, Head Teachers and Governing Bodies*.

It is the responsibility of the headteacher/EVC to ensure that all trips have been planned and carried out according to the following Educational Visits guidelines.

There are two types of category of visits: -

TYPE 1

Type 1 visits are those that fall into **none** of the categories in table 2 below which define a visit as Type 2.

There are two categories of Type 1 visit:-

R: Regular, routine off-site activities (e.g. the use of off-site facilities for PE)

S: Specific, one-off or occasional visits. (E.g. museum visits, field study Visits).

The headteacher/EVC and visit leader should ensure that Type 1 visits are organised in accordance with this policy and the relevant forms completed.

TYPE 2 VISITS

Type 2 visits are those which fall into **one or more** of the categories A-E below: -

A: Visits including an overnight stay, including overnight stays on the school Site (D.O.E.)

- B:** Visits including adventurous activities supervised by a teacher including adventure activities on the school site.
- C:** Visits including adventurous activities supervised by an external provider (eg a commercial centre or hired instructor), including adventure activities on the school site
- D:** Visits abroad
- E:** Visits where any site owners or activity providers require to be indemnified against claims arising from the visit.

All Type 2 visits require authorisation by the Headteacher and the EVC on the Proposal form.

SUMMARY OF RESPONSIBILITIES

In any educational visit, there will be a number of individuals and bodies each with a role in ensuring that the visit meets its objectives and safe practice is followed.

The obligations of those involved in educational visits derive both from health and safety legislation and from common law. A more detailed consideration of these legal obligations is given in [Appendix 2](#).

Responsibilities that apply to all staff involved in educational visits

All staff members should be aware of the expectations placed upon them and should appreciate the nature of their relationship to the pupils and other staff. They should fully understand and be comfortable with their role before accepting their place on the visit.

All staff must:

- Conduct themselves in a manner compatible with their own safety and with the safety and well-being of the pupils

- Inform the visit leader if they are unsure of their ability to perform any supervisory function requested of them
- Recognise the limits of their responsibilities and act within these at all times
- Report to the visit leader any concerns they may have concerning pupil behaviour or well-being during the visit.

Greater levels of responsibility will normally be assigned to teachers, and qualified teaching assistants, than to other adult helpers, and a higher standard of care is expected of them.

Responsibilities of group leaders

Group leaders, whether teachers, teaching assistants or adult helpers, have a common law duty of care towards the pupils in their charge.

Group leaders must recognise their responsibilities for:

- Maintaining good order and discipline
- Ensuring the safety and well-being of the pupils in their care
- Informing the visit leader of any incident that has implications for pupils' health and safety, their general welfare or the good order of the visit as a whole.

An explanation of the legal background to these responsibilities is given in [Appendix 2](#).

Responsibilities of the Visit Leader

The visit leader has responsibility for the organisation of the visit. The visit leader must:

- Oversee the recruitment of pupils to the visit, and ensure that the visit is organised so as to enable the pupils to achieve the learning outcomes intended.
- Ensure that adequate arrangements are planned and implemented for the safety and well-being of all participants, staff and pupils, whilst on the visit
- Ensure that all members of staff are fully briefed as to their roles and responsibilities

- Ensure that group leaders are appointed with proper regard to their experience and competence to undertake the tasks assigned to them.
- Ensure that participants conduct themselves with due respect for the environment and the local community.

Overseas travel documentation

Ensure that all paperwork and documentation is completed in full and is valid for the period of the trip. Trips going abroad will require passports and may also need visiting visa's and medical insurance cards. Leaders should make sure that documentation is checked at least eight weeks prior to the departure.

Visit leaders must inform the headteacher/E.V.C. if any concerns arise which lead them to feel unsure of their competence to lead the visit safely.

Responsibilities of the Headteacher or Educational Visits Co-ordinator

As part of their role, the headteacher is responsible for ensuring that all school activities are properly planned and appropriately supervised.

In respect of educational visits, the headteacher may delegate some or all of their duties to a senior member of the teaching staff, nominated as educational visits co-ordinator (Mr A. King). This person should ideally have experience as a visit leader over a number of years, and experience participating in the range of different types of visit organised by the school.

Accepting that, in practice, responsibilities may be delegated to an educational visits co-ordinator, for simplicity, the term "headteacher" is used in the main body of this policy to refer to the person taking the responsibilities listed below.

- Ensuring visits are properly planned
- Ensuring that risk assessments are undertaken
- Approving the staffing ratios for visits, taking account of the planned arrangements for the visit and the nature of the pupils involved
- Verifying the competence of visit leaders and assistant staff to undertake the duties that will be expected of them

- Ensuring parents are properly informed and give their consent
- Organising emergency planning for educational visits at school level
- Monitoring visits, receiving incident and near miss reports, and keeping school procedures under review
- Arranging staff training and induction in the organisation of educational visits

An expanded statement of these responsibilities, relating to the nomination and training of Educational Visits Co-ordinators, is given in [Appendix 12](#).

NOTIFICATION OF EDUCATIONAL VISITS

Party leader must first complete a trip notification form and submit this to the headteacher/EVC 9 forms available from the school office

Ratios

The staff/pupil ratios prescribed in this section are **minimum figures**. The headteacher/EVC has the duty to ensure that a visit is adequately staffed, bearing in mind the nature of the activities to be undertaken, the particular needs of the pupils, and the competence and experience of the staff assigned to the visit.

Frequently, the risk assessment for the visit will determine that a higher ratio of staff to pupils is required than the minimum stipulated here particularly where visits involve adventurous activities or involve close proximity to water.

Guidance will be provided by the EVC

Trips involving early years pupils do require particular guidance and need to be assessed independently bearing in mind the ability and competence of the pupils, the nature of the visit, the environment and the experience and competence of the supervising staff.

The following are the **minimum** staff/pupil ratios for Type 2 educational visits involving pupils in the age ranges stated:

- Age 11-18 (years 7-13) : 1 to 20
- Age 7-10 (years 3-6) : 1 to 15
- Age 5-6 (years 1 & 2) : 1 to 10

- Age 4 and under (nursery) : 1 to 6

In every case at least one staff member, the visit leader, must be a qualified teacher. If more than 30 pupils are involved there must be at least one teacher to every 30 pupils. Please note: for an EYFS visit one staff member must be a qualified paediatric first aider.

The above minimum staff/pupil ratios, and the requirement for the inclusion of teachers, are **mandatory** for all Type 2 visits. More stringent ratios applicable to certain categories of Type 2 visit are prescribed in the following paragraphs.

The above minimum staff/pupil ratios, and the requirement for the inclusion of teachers, have the force of guidance for Type 1 visits in Category S (specific one off or occasional visits). Greater flexibility may be appropriate in the case of regular routine off site activities.

Additional Requirements for Specific Categories of Type 2

Visits including an Overnight Stay (Category A)

For any visit involving an overnight stay the minimum staff/pupil ratio is 1 to 15, subject to there being at least 2 staff. For single sex parties at least one staff member must be of the same gender as the pupils. For mixed parties at least one staff member of each gender must be included.

In the exceptional case of an overnight stay involving pupils in years 1 or 2, the stricter minimum staff/pupil ratio of 1 to 10 applies.

These ratios also apply to any overnight stays that are organised on the school site.

Visits Abroad (Category D)

For visits abroad the minimum staff/pupil ratio is 1 to 10, subject to there being at least 2 staff. For single sex parties at least one staff member must be of the same gender as the pupils. For mixed parties at least one staff member of each gender must be included.

The requirement for the inclusion of teachers in the ratio is as in paragraph.

Visits including Adventurous Activities (Categories B and C)

Overall staffing for any visit where activities classified as adventurous form part of the programme must conform to the general requirements for Type 2 visits. In

addition, specific regulations may apply to the staffing of the activities themselves.

Staffing for the journey

The journey to a residential destination in Britain, provided it does not involve overnight travel, may be counted as a Type 1 visit, even though the visit as a whole is Type 2. This permits greater flexibility for staffing during the journey, particularly when additional staff will be available at the destination. The same applies to day visits to centres providing adventure activities.

Young People

Young people under 18 who are participating in the visit are counted as pupils in the above ratios, even where they are not on the roll of the school. Young people over 18 are also counted as pupils if they are still on the school roll, or if they are contemporaries of pupils on the school roll who are participating in the visit. In other cases, for example on visits organised by primary schools, young people over the age of 18 may be counted as staff, at the headteacher's discretion

Remote supervision of pupils.

Pupils may, for periods during an educational visit, undertake activities unaccompanied by staff. This is termed "remote supervision". As a logical extension to this, and subject to the same considerations, older pupils may sometimes undertake off-site activities local to the school unaccompanied, while the teacher in charge remains on the school site. This will normally only be appropriate for off-site activities classified as Type 1, and the supervision arrangements may therefore be determined by the school. The particular pupils involved must be judged sufficiently mature and competent to operate under remote supervision as part of the risk assessment for the activity, and the teacher in charge must be in a position to drop other responsibilities and give prompt assistance if required.

DOCUMENTATION

PARENTAL CONSENT

Parental consent must be obtained from the parent or carer of each pupil taking part in any visit. (Parental Consent form)

Full written details of the visit must be provided to parents before their consent is requested.

No child may participate in the visit unless all the information and undertakings required from parents are completed on the Parent Consent form (available from the school office)

Parents sign and agree for the leader of the trip to have responsibility to make judgements based upon medical advice as to the need for medical treatment. Every effort will have been made by the staff to make contact with the parent using the emergency contact details on the consent form.

RISK ASSESSMENT - HOW TO DO IT (5 STEPS)

The following guidance on how to complete a risk assessment is based on, though not identical to, the Health and Safety Executive's "5-Steps" approach.

Identify and record the significant risks

- Consider the risks, if any, associated with the venue(s) to be visited, the journey there and back, the activities to be undertaken, and the young people participating. Decide which, if any of these are significant, and record these.
- The "significance" of a risk is a combination of the likelihood of an incident occurring and the severity of the consequence if it does. Some incidents could have fatal consequences. In this case the risk is always significant, unless the likelihood is truly negligible. On the other hand, if the worst consequence of an incident would be a painful but minor injury from which the casualty should make a full and quick recovery, then the risk need not be considered significant unless the likelihood is quite high.
- Deciding whether a risk should be counted as significant can be difficult. It may be easier to put risks in a rough rank order, and prioritise for action those at the top of the list. (Some people find a numerical assessment, or a "high", "medium" or "low" ranking helpful, but it is not essential to do this.)
- Some risks may not be the responsibility of the visit leader, for example those that relate to adventure activities provided by an activity centre. These need not normally form part of your own risk assessment.

Identify and record the precautions that reduce the risks to an acceptable level

- Your risk assessment record can simply refer to precautions already recorded, provided you ensure that all staff who need to know are familiar with the guidance.
- The following are the sorts of precautions that you may need to consider.
 - Managing the activity
 - Have you enough experience as visit leader – do you need someone with more experience?
 - Are there enough competent group and activity leaders?
 - How will you organise the pupils (eg when crossing roads, in transport)?
 - Influencing participant behaviour
 - Do they need more training or preparation?
 - What safety briefings do they need?
 - How closely must they be supervised?
 - Will some pupils need additional supervision?
 - Will pupils benefit from involvement in planning the activity?
 - Physical protection
 - Should pupils bring particular clothing or footwear?
 - Do you need any safety equipment; if so how is it maintained and checked?
 - Do you need to protect pupils from hazards (eg open water); are barriers in place?
 - Removing/reducing the risk
 - Would it be safer and equally effective to do the activity somewhere else?
 - Would it be safer and equally effective to do it in a different way?
 - Would it be safer at a different time (eg summer rather than winter)?
 - Can you reduce exposure to risk (eg by crossing a road less often)?
 - Should some pupils, for example those exhibiting challenging behaviour, not be permitted to participate? (NB: see [Appendix 10](#) for detailed guidance on this point).
 - Anticipating incidents/accidents
 - Are there clear evacuation routes from buildings – do you need a fire drill?
 - Is there adequate first aid provision?
 - Have you robust emergency procedures in place?
- It is valid to balance risks against benefits, but it is not normally justified to expose young people to significant risks if the same learning outcomes can be achieved at less risk, for example by doing an activity at a different location or in a different way.

- Never forget that you always have the option not to do the activity. If it becomes obvious during a visit that an activity cannot be safely undertaken (for example because weather conditions have changed), it's always best to have an alternative "Plan B" to hand.

Identify who is responsible for implementing the precautions

- Some precautions may need to be implemented by the visit leader during the planning process. Some may require action by specific staff or by all staff in charge of groups during the visit. Some may require information to be given to participants or parents.
- Providers must assess the risk or hazards which may arise for the children, and must identify the steps to be taken to remove, minimise and manage those risks and hazards. The assessment must include consideration of adult and child ratios. The risk assessment does not necessarily have to be in writing; this is for providers to judge.
- As visit leader, you must ensure that everyone is briefed on his or her individual responsibilities, and that they are competent to undertake these. If in any doubt, you will need to check that key tasks that have been delegated are actually carried out.
- Make sure nothing important is overlooked because everyone has assumed that someone else has done it.

Do the Activity

- Well-planned activities stand the best chance of running smoothly, giving you the opportunity to focus on the learning outcomes for your participants.
- However, there will always be a need to keep alert to risks that may not have been foreseen in the planning process, and to assess and deal with these as they arise. The professional judgement of the experienced leader in the field is an important safety factor - though relying on judgements made "on the hoof" is not a substitute for proper planning.

Review the Risk Assessment

- Reviewing is a key component of risk assessment for educational visits. Particularly when visits are organised to a similar pattern on a repeated basis it is easy to become complacent and presume that all is well when in fact an avoidable incident may be waiting to happen.

- Safety precautions should be reviewed at the end of the visit, ideally with all staff present and encouraged to raise any concerns they may have. Staff must be encouraged to report any “near misses” as part of this process. Additional precautions should be incorporated into the risk assessment for the next occasion. Any precautions that, with hindsight, were not necessary can be removed.
- For regular activities covered by one risk assessment, this review might be done on an annual basis. However it is still important to have a mechanism by which staff can raise concerns on other occasions as they arise.

PLANNING

Careful planning and preparation are essential to the success and safe conduct of any educational visit. It is vital to allow sufficient time for preparation, and helpful, right at the start, to draw up a timetable with deadlines for actions.

Purpose of the Visit

The aim and objectives of any visit should be identified at an early stage. These should:

- establish the place of the visit within the broad curriculum of the school
- be appropriate to the pupils for whom the visit is intended, taking into account their age, ability, maturity and previous experience
- be realistic, bearing in mind the financial and staffing resources available.

Clear, appropriate objectives contribute to the safety and welfare of the pupils as well as the educational value of the visit. They ensure:

- an appropriate choice of venue and programme of activity
- realistic identification of staffing and resource needs
- an appropriate structure and discipline to the visit
- maximum pupil motivation.

Venue and Activity Content

The choice of venue and the activity content for the visit should follow from the identified aim and objectives.

Before finalising the venue and activity content, consider the following points:

- Is this the most effective way of achieving the visit’s objectives?
- Is this the most economical way of achieving the visit’s objectives?
- Is this the safest way of achieving the visit’s objectives?
- Is this the way of achieving the visit’s objectives that will most motivate the pupils?

Often these considerations will conflict and a balance must be drawn.

Travel to a distant location may be necessary to achieve certain objectives. However, do consider whether the same objectives might be more simply and cheaply achieved closer to home.

To achieve some objectives, it may be necessary for pupils to work in an environment that presents potential hazards, for example, roadside, cliff top or water's edge. In general, however, it is not justified to expose pupils to potential hazards if the same objectives can be achieved at an alternative, safer location.

Give particular care to the choice of venue if undertaking visits with pupils who lack maturity for their age or exhibit challenging behaviour (See [Appendix 10](#) for more guidance on the inclusion of such pupils on educational visits). If the sanction of sending home is contemplated, choose a reasonably local venue from which this can be organised without too great a disruption to the visit. Environments which present serious potential hazards should only be visited if the pupils are sufficiently reliable and experienced to understand the nature of the hazards involved and obey essential safety instructions.

1.3 Reconnaissance and Research

A reconnaissance visit, by some or all of the staff team, is strongly recommended, particularly if any of the following apply:

- The staff team is relatively inexperienced, or all or most of the staff are unfamiliar with the venue
- The proposed programme includes teacher-led activities which the staff have not supervised at this location before
- The party will include very young pupils, pupils with special needs or pupils who exhibit challenging behaviour
- The environment presents particular hazards to which staff should be alerted.

Also consider other means of researching the venue, particularly where a reconnaissance visit is not possible. Sources of information include local councils, tourist offices and national park information services as well as site owners, activity providers or tour operators. The Outdoor Education Officer(Suffolk) has information on venues for adventure activities, and may be able to refer visit organisers to other schools who have used particular venues for educational visits.

If a reconnaissance visit is not feasible, time for staff familiarisation may need to be programmed into the visit.

A reconnaissance visit provides the opportunity to:

- Assess whether the venue is appropriate to the pupils' needs and the objectives of the visit
- Check for any unforeseen potential hazards, particularly if activities are to be led by the staff accompanying the visit rather than by staff employed at the venue
- Obtain information pertinent to the activity programme, for example travel times to and from the venue and between activity locations, opening hours of sites to be visited, etc
- Research the resources needed for any activities to be led by the staff accompanying the visit
- Establish local contacts, and liaise with providers of accommodation and activities
- Gain familiarity with the area and check the location of local services (telephones, toilets, nearest hospital).

1.4 Programme

Once the venue or venues have been researched the programme for the visit can be determined. It is worth drawing up a detailed provisional programme, with timings and staff allocations, so that potential problems are identified, even though in practice some flexibility may be needed.

If it is possible that one or more planned activities may be unavailable, for example due to bad weather, contingency arrangements should always be made (Plan B).

As far as possible these should be consistent with the objectives of the visit.

Pre-visit planning must also address the procedures required to deal effectively with an emergency.

1.5 Staffing the Visit

The responsibility for staffing the visit rests with the headteacher/EVC. If a visit is initiated by a teacher other than the head, early consultation with the headteacher/EVC is essential.

1.5.1 The Visit Leader

The headteacher/EVC must appoint a qualified teacher as visit leader. He or she will be responsible for the organisation of the visit, the welfare of the pupils and the leadership of the staff team.

Before appointing a teacher to lead a visit for the first time, the headteacher/EVC will need to be satisfied that he or she is competent to take charge of the visit.

As a minimum, a visit leader should have a record of successful teaching experience in school with pupils of similar age and maturity to those included in the visit.

However, visit leadership requires organisational skills beyond those required to teach pupils successfully in the school environment. Not all teachers will be ready to take this responsibility. Skills in visit leadership are not normally acquired as part of initial teacher training and additional training or experience may be required. Often the most valuable experience is gained by acting as an assistant leader and taking progressively greater responsibilities on visits of a similar nature.

Where the headteacher/EVC has not personally observed a prospective visit leader on previous visits, it is good practice for the head to consult an experienced colleague who has had this opportunity.

1.5.2 The Deputy Leader

Where there will be more than two staff a deputy leader should also be appointed.

Where there are just two staff, the second staff member is automatically deputy. The deputy leader must be kept properly briefed so that he or she can assume responsibility if required

Ideally the deputy leader should be competent to take charge for the remainder of the visit in the event that the visit leader should become incapacitated. Where this is not the case, or where there is only one staff member involved, then contingency arrangements should be put in place for another experienced colleague to replace the leader during the visit if required.

1.5.3 Assistant Staff

The headteacher/EVC must ensure that the visit is adequately staffed. They will need to consider a variety of factors, in addition to ensuring that the County prescribed minimum ratios are observed.

- For effective supervision, large parties will normally be divided into small groups each in the charge of a nominated group leader. All staff members who will assume the group leader role must have appropriate experience and be judged competent to undertake this responsibility.
- Any staff who will take charge of activities during the visit must have the necessary competence and experience in leading these activities.
- Small parties with minimum staffing are vulnerable to staff illness or accident.

If the staffing for a visit is such that it would not be safe for it to continue in the event of the incapacity of one staff member, then contingency arrangements should be in place for a replacement member of staff to be on standby, able to join the visit if required.

- Visits led by one teacher alone should only be contemplated where the pupils are of sufficient maturity to act responsibly until an incapacitated leader can be replaced.
- The supervision of pupils off-site places additional physical and mental stresses on staff. Account should be taken of this, and allowance made for any staff disabilities, medical conditions or other relevant circumstances pertinent to their role on the visit.
- A higher staff/pupil ratio will generally be needed where the party includes pupils who have physical, emotional or learning difficulties.
- If pupils with a poor record of obedience, or who exhibit other challenging behaviour are included, the staff team should contain at least one person to whose discipline they normally respond.
- If pupils with serious disabilities or behavioural problems are included in the visit, one or more members of staff may need to work on a one to one basis with the pupil or pupils concerned. In this circumstance there should be sufficient staff overall to permit this without prejudicing the safe supervision of other pupils. (See [Appendix 10](#) for more guidance on the inclusion of such pupils on educational visits).
- If certain planned activities require a high staff/pupil ratio, the overall staffing should take account of this, to ensure that the remainder of the party are adequately supervised.
- Where transport is by minibus or other vehicle driven by a member of the staff team, additional staffing may be required.

Staff members may sometimes be accompanied on visits by their own child, spouse or partner. For example, the child of a teacher may be in the appropriate year group for the visit. A parent helper may be a valuable addition to the staff team. A teacher's spouse may be the only male or female adult able to assist with a residential visit, and can sometimes only attend if accompanied by their child.

An adult accompanied by a child who is too young to join the visit as a pupil may not be counted in the numerical staff pupil ratio. It should be assumed that he or she will be occupied caring for their child. They may however count as the sole male or female staff member on a residential visit provided care of the child can be passed to another staff member if required. In other cases staff accompanied

by family members may count in the ratios, but headteacher/EVC should be aware that possible conflicts of interest can arise, particularly in an emergency situation, and ensure that the overall staffing for the visit takes account of this.

Occasionally, staff senior to the visit leader may be included in the staff team.

Normally, senior staff should accept the authority of the visit leader for the duration of the visit. However the headteacher/EVC may sometimes appoint a senior colleague to add strength to the team, for example where the nominated visit leader is relatively inexperienced. In this case, the headteacher/EVC should clarify their roles with the staff concerned prior to the visit.

1.5.4 Teaching assistants and other adult helpers

Adults other than teachers will frequently be included in the staff team to enhance the staff/pupil ratio. These adult helpers must be acceptable to the visit leader and to the headteacher, and should be chosen for the contribution that they can make to the success of the visit. They must understand and agree to accept the responsibilities involved.

All participating adults should have a defined role in the organisation of the visit and/or the supervision of pupils. It is not recommended that adults participate in a visit other than in this capacity.

Teaching assistants will often be an important part of the staff team and will build up valuable experience as they participate in visits. Provided they are judged competent to do so, it will frequently be good practice for teaching assistants to take on the role of group leader in charge of a group of pupils. Greater responsibilities may be appropriate for higher level teaching assistants and this is reflected in the County regulation that permits colleagues with this status, if judged competent, to be counted as teachers in the staff / pupil ratio for Type 2 visits.

Generally, it will not be appropriate for adult helpers, other than teaching assistants, to be placed in sole charge of pupils during a visit. They can, nonetheless, make a valuable contribution in a support role. Where they are, exceptionally, given responsibility as group leaders, this should be determined as part of the risk assessment undertaken prior to the visit. The adults concerned should be known to the school, for example through participation in previous visits, and the pupils in the group should be carefully chosen.

County guidelines on Criminal Record Bureau checks must be followed in respect of all adult helpers on educational visits. Where CRB checking is not a County requirement, it can, none-the-less be effective to indicate to prospective helpers that checks may be requested on a sample basis. This can often deter unsuitable

adults from coming forward as volunteers. A CRB check should be requested for any adult about whom the school has concerns.

In general, situations where one adult is alone with one pupil should be avoided on visits, but may, for example in an emergency, occasionally be necessary. Any adult likely to be placed in this situation must be CRB checked.

1.5.5 Staff Briefing

The visit leader will normally wish to involve as many of the staff team as possible in all stages of planning the visit. At least one formal briefing meeting is recommended for the whole staff team prior to the visit. It may be appropriate for the headteacher/EVC to attend this meeting.

At this meeting the visit leader should ensure that all staff:-

- Are familiar with and support the visit's objectives
- Are aware of the code of conduct which will be expected of the pupils and agree to reinforce this during the visit as necessary
- Are comfortable with and agree to abide by any constraints on staff behaviour which are necessary for the good conduct of the visit
- Understand, accept and are comfortable with the responsibilities which they will be asked to assume
- Are aware of their responsibility to notify the visit leader of any concerns they have regarding the behaviour or well-being of pupils participating in the visit
- Are aware of the procedures to adopt in the event of an emergency.

It may be helpful for the party leader to draw up a written statement of staff responsibilities.

1.6 Selecting Pupils

The guidance in the preceding paragraphs assumes that the pupils have been identified first and the visit planned around their needs. Frequently the reverse applies. The visit is planned in outline before the participants are identified and invitations to participate are then extended to a year group or to the whole school.

In this case, pupils should be selected for whom the visit is appropriate and, if this proves impractical, the plans for the visit should be adapted accordingly.

The ability to pay will sometimes be a factor in pupil selection. Visit organisers are reminded that the Education Act 1996 restricts the circumstances in which this is legally permitted.

It may occasionally be necessary to exclude from a visit pupils with physical or learning difficulties, medical conditions or challenging behaviour that would

prejudice their safety. However, schools may not legally treat disabled pupils less favourably without a sound justification for doing so. In general schools should seek to make adjustments to the visit to enable the participation of pupils who will benefit. (Visit organisers should refer to [Appendix 10](#) for detailed guidance on the inclusion of pupils with disabilities and pupils with challenging behaviour on educational visits)

1.7 Briefing and Involving Pupils

Involving pupils closely in the planning process, including the process of risk assessment, frequently adds educational value to a visit, and increases motivation. As a minimum, prior to the visit, all pupils should be made aware of its purpose and the level of commitment and standard of behaviour that will be expected of them. The importance of following all staff instructions should be emphasised.

It is often helpful to draw up a written code of conduct for pupils, with clearly understood sanctions for infringement. Staff are strongly advised to avoid the use of the word 'holiday' in connection with any school visit. Although pupils may benefit from a slightly less formal relationship with staff than applies at school, all pupils and staff should understand that the general framework of discipline on an educational visit remains as it would be at school, regardless of the nature of the visit.

It is important that pupils understand that in certain circumstances planned activities may not be possible and an alternative may need to be offered. Avoid building up too high an expectation in relation to particular activities. This can result in pressure to continue with an activity in circumstances when it has become unwise or unsafe to do so.

1.8 Liaising with Parents

Liaising with parents is a vital aspect of the planning of any educational visit. Written consent is required for children to take part in off-site educational activities organised by the school. Parents should be fully informed, in writing, of the details of the visit, before their consent or financial contribution is requested. This information should include:

- The purpose of the visit
- Dates and times of departure and return
- The destination (with address and telephone number where applicable)
- The names and status (e.g. teacher, parent) of the visit leader and any other staff who will have responsibilities as group leaders during the visit

- Details of the activities to be undertaken, including the names of staff members or external providers who will supervise these (including any alternative activities that might be undertaken if plans have to be changed)
- Details of any circumstances in which pupils may be unaccompanied under “remote supervision” during the visit, either in ‘down time’ or undertaking a programmed activity
- A statement of the level of commitment and standard of behaviour which will be expected of the pupils, including a copy of the pupils’ code of conduct if appropriate, together with a reminder to parents of their responsibility to reinforce this prior to the visit
- The travel arrangements (and name of travel company where appropriate), with particular reference to any occasions when pupils might be transported in private staff cars
- The cost of the visit (and what this does and does not cover)
- The method of payment and any cancellation arrangements/penalties
- Details of the insurance arrangements for the visit
- Clothing and other belongings which pupils will need to bring (and any items which are prohibited)
- Advice on pocket money
- Emergency contact arrangements, including a telephone number at which parents can contact the party, either directly or through the school, in the event of an emergency at home or a concern following contact with their child on the visit. (Note that many parents may expect to be able to contact their son or daughter during the visit by mobile phone, but this does not constitute a formal emergency contact procedure, which should be directly with staff).

Sufficient information must be provided so that a reasonable parent could not claim afterwards to have been misled as to the nature of the visit and the activities included, the arrangements for supervision (including any remote supervision), the standard of behaviour expected, or the financial and insurance provisions. If any arrangements for the visit are likely to be contrary to parents’ reasonable expectations then it is vital that these aspects are brought specifically to parents’ attention.

If pupils will assemble or be dismissed outside of school hours, or away from the school site, parents should be informed exactly when and where supervision by visit staff will commence and finish. In these circumstances, if parents wish their child to make his or her own way home at the end of the visit, or to travel home

with another pupil's parents, then it is wise to request confirmation of this from the parent in writing.

It should also be made clear that under certain circumstances, for example illness or persistent misbehaviour, parents must be prepared to resume supervision of their child prior to the scheduled completion of the visit. If parents may be asked to collect pupils, or if school policy is to charge parents for any additional transport costs in these circumstances, then parents should also be informed of this prior to the visit. Note that the supervision of a pupil "sent home" remains the responsibility of the visit leader until a hand-over has been made to the parent.

1.9 Health Issues

The visit leader has a duty of care to safeguard the health of pupils whilst participating in an educational visit. The following issues should be addressed at the planning stage.

- Medical information regarding pupils, obtained from parents on the parental consent form, should be accessible to group leaders during the visit. Parents should have signed and agreed to pass onto the leader the responsibility of making decisions regarding any treatment a pupil may need to receive through the advice of a professional medical practitioner. Every attempt will have been made to contact a parent using the emergency information on the consent form.
- All participants should have access to first aid equipment, and a nominated person with first aid knowledge throughout the visit. (The more remote the location, the higher the level of first aid knowledge required)
- The location of the nearest accident and emergency hospital should be determined, and the means of summoning an ambulance at any stage during the visit identified (normally the location of the nearest telephone, or confirmation of fully reliable mobile phone reception).
- For residential visits, the location, phone number and opening hours of the nearest doctor's surgery should be established.

If the school has any doubt about the health of a pupil, prior to a visit, the headteacher should ask the parents to provide written confirmation from a medical practitioner that the pupil is fit to participate.

The visit leader and all group leaders should be familiar with and follow the school's policy on supporting pupils with medical needs.

2. ORGANISATION DURING THE VISIT

A visit leader's responsibilities can be onerous and should not be assumed lightly.

Generally, the more thorough the planning for the visit, the less difficult is the leader's task during the visit itself.

The following notes apply to the organisation of the party on any visit.

2.1 Delegating Responsibility

For any party other than the smallest, the visit leader will wish to delegate responsibility for the supervision of some or all of the pupils at various times. This should be done by appointing other members of the staff team as group leaders.

When placing a group of pupils in the charge of a group leader the visit leader must be satisfied that this person:

- is competent to take charge of the particular group of pupils in the circumstances
- is fully briefed and understands that he or she is responsible to the visit leader for the supervision of the pupils assigned to them
- has a clear plan of the activity to be undertaken and understands the educational objectives
- is aware of any special needs, behavioural problems or relevant medical details pertaining to the pupils now in his or her care
- knows the next meeting place and time and understands the agreed emergency procedures
- will re-enforce the standard of behaviour expected of the pupils
- has ready access to a register of all group members; this should be carried by the group leader if operating away from the visit base.

These considerations may have been addressed at the planning stage, but should be reaffirmed during the visit.

Whenever responsibility for the supervision of pupils has been delegated, the visit leader must ensure that:

- Each member of staff knows exactly for which pupils, if any, he or she is now responsible
- Each pupil knows which member of staff is now in charge of his or her group.

Particular care should be taken when rearranging groups, for example when a large group is split into smaller groups, when a group is transferred from one group leader to another or when small groups reform into a large group. A clear transfer of responsibility, including a head count, will be necessary at this time.

If there is no delegation to group leaders the visit leader remains responsible for the whole party. It is not satisfactory to assume an undefined, shared responsibility for a group of pupils between several members of staff.

2.2 Supervision of Pupils when Accompanied (Direct Supervision)

In this handbook the term “direct supervision” is used to refer to circumstances where pupils are physically accompanied by the group leader in charge of their group. “Remote supervision” refers to circumstances where pupils are unaccompanied.

When it has been decided that pupils should be directly supervised, the following steps should be taken by the group leader to ensure that they remain attached to their group:

- The pupils should be given clear instructions that they are to stay in their group, or within a defined area in sight of their group leader
- The group leader should regularly check that all pupils in his or her group are present.

Several methods can be employed to ensure that pupils remain with the group.

These can be particularly useful when visiting crowded venues where it is very easy for pupils to become detached.

- Allocate a small group of pupils to each staff member who should independently head count their group at frequent intervals
- Implement a “buddy system” in which pupils are paired and report immediately if their buddy is missing. (A “circle buddy” system avoids the possibility that two buddies will become detached together. Pupils form a circle at the start so that each pupil has a left side and a right side buddy both of which they check on when asked)
- With younger groups, in particular, or in crowded places, consider making pupils readily identifiable. This could be achieved, for example, by wearing school uniform or another distinguishing item of clothing. A badge with the school name and perhaps the name of the party’s hotel or tour operator may be helpful (but not the pupil’s name – this could potentially put pupils at risk)
- Ensure that each pupil knows where to rendezvous in the event that they become detached from the party, and be absolutely certain that all pupils are present before moving on to a different venue which requires a different rendezvous point.

2.3 “Down Time”

“Down time” refers to any period when pupils are not engaged in a structured activity. Visit leaders are advised to use the term “down time” in preference to “free time”. “Down time” on educational visits is best kept to a minimum as,

generally, a group occupied in study or activity is far safer than a group left to its own devices in an unfamiliar environment.

Group leaders should ensure that pupils continue to be properly supervised during “down time”, including in the evenings on residential visits.

Visit leaders should:

- ensure that all staff and pupils understand the standards of behaviour that apply at all times, not just during activities
- apply the guidance contained in the following section on responsibility for pupils when unaccompanied, if it is decided to allow pupils some time without close supervision.

2.4 Responsibility for Pupils when Unaccompanied (Remote Supervision)

During many visits there will be periods when pupils are not accompanied by a member of staff even though, with younger pupils, staff should normally be close at hand. With older pupils it may be both appropriate, and educationally valuable, that they undertake extended activities unaccompanied.

The term “remote supervision” should be used to refer to this, rather than “unsupervised” which could be taken to imply a diminution of responsibility.

Whenever pupils are unaccompanied, they remain the responsibility of the visit leader or the group leader in charge of their group. Before allowing a group of pupils to operate under remote supervision in this way, this person must:

- make a conscious decision, based on a knowledge of the pupils and the locality, that the pupils can operate unaccompanied in safety
- ensure that the pupils have a means of making contact, and are aware of the procedure to adopt, in the event of an incident or emergency or if for any other reason the activity needs to be abandoned (this should not rely exclusively on mobile phones)
- give the pupils clear instructions as to where they may go, what they may do, and when and to where they must return.

In general, older pupils can be entrusted with greater responsibilities, but it should not be assumed that all pupils of a particular age are sufficiently responsible to be remotely supervised in a given situation. The decision must be made based on a sound knowledge of the maturity and reliability of the individuals concerned.

Proper briefing is vital. Even so, leaders cannot assume that they have discharged their responsibility for pupils left unaccompanied simply by issuing them with clear instructions or warnings. They should also have a reasonable expectation that these instructions will be obeyed. This would not be the case, for example,

where the pupils are known to have a tendency to disregard or disobey the instructions of the member of staff concerned. It is important, in these circumstances that the instructions are backed up by a member of staff to whose discipline the pupils do respond.

It is also important not to compromise discipline under remote supervision by appearing to ignore infringements deemed “out of sight”, and thus, in pupils’ eyes, condoning them.

In environments which present hazards beyond their normal experience it is unwise to allow pupils to operate under remote supervision without prior training in an accompanied situation. (The expeditions section of the Duke of Edinburgh’s Award provides a model structure for training and preparing older pupils to undertake challenging expeditions unaccompanied.)

Sadly, even in environments which present no natural hazards there may still be a risk of assault, particularly to small unaccompanied groups of pupils.

In general, pupils should not be permitted to undertake remotely supervised activities singly; pairs should be the minimum. Exceptions include controlled activities such as orienteering events, where officials and other participants can be relied upon for assistance.

Unaccompanied Visits

In exceptional circumstances, pupils in years 10 may undertake a whole visit entirely unaccompanied including the journey to and from the venue.

For pupils in years 10 and 11 this should normally be restricted to day visits local to the school.

As with all visits, a teacher must be appointed visit leader, and other staff must be appointed to assist if required by the ratios. Although not actually accompanying the pupils, staff should be involved in the planning and preparation with the pupils, and the visit leader must discharge all the responsibilities. Parents must be fully informed of the supervision and support arrangements for the visit and consent accordingly.

All the guidance above in relation to remote supervision applies in this circumstance. It is essential that pupils have a failsafe means of making contact with staff in an emergency at any time during the visit. This may involve giving pupils two emergency contact numbers. If the visit involves one or more nights away from home, overnight emergency contact with a member of staff of the same gender as the pupils should be available.

The safety of the pupils may be enhanced if a responsible adult based at the venue can act in a liaison or supervisory capacity, able to offer assistance if the

pupils find themselves in difficulty. However, such arrangements do not absolve the visit leader, and assistant staff if required, from an obligation to travel to the venue should an emergency require this level of support. They must be free to drop other responsibilities and offer prompt support to the pupils on the visit if required, including, in an emergency, travelling at short notice.

An alternative approach may be considered for visits that take place outside school hours and schools may inform parents that the visit is not one for which the school can take responsibility, and leave parents to make any arrangements they see fit.

Programme Flexibility

Even the best planned visits may fall victim to the unforeseen. In these circumstances a pre-arranged contingency plan is valuable ("Plan B"). Failing this, on the spot decisions will have to be made by the visit leader, frequently under pressure of time, and with unsettled pupils to contend with.

- The first consideration should be the safety and welfare of the pupils and staff.

Any revised programme must permit proper staffing and supervision, and not compromise the operation of emergency procedures.

- The second consideration should be the objectives of the visit. As far as possible the revised programme should be consistent with these and avoid a greater diversion from the planned programme than necessary.

Experienced visit leaders may deliberately make flexible plans, leaving open a variety of options to be pursued according to the needs of the pupils at the time.

This approach should not, however, be used as an excuse for skimping on the planning process. It also opens the door to allowing pupil enthusiasm to divert the programme from its objectives. This needs to be resisted.

Transport

Transport by Coach, Minibus or Train

Particular supervision considerations apply during transport to and from the venue or between activity sites. The following points should be noted:

- Road transport should have seat belts that the pupils are required to wear.
- Supervising staff should have reserved seats that allow them to supervise properly.
- Appropriate standards of behaviour must be observed; in particular drivers must not be distracted.
- Pupils are best occupied on long journeys; this will help the journey pass quickly.

- Preparations should be in place to assist participants suffering from travel sickness.
- Evacuation procedures should be clearly understood by everyone in the party.
- Adequate rest stops should be scheduled.
- Pupils should be supervised carefully when boarding and leaving; head counts should be made, and double checked. Transport should not move off until this has been done.

Additional considerations apply on transport such as trains or ferries where there is freedom to move around. If pupils are allowed to leave the area directly supervised by staff then the guidance above on remote supervision applies.

Minimum staff/pupil ratios on transport should normally be as recommended for day visits. Note that a driver cannot safely drive and supervise pupils at the same time. It is only appropriate for the driver to be the sole staff member in a minibus if the pupils are of sufficient maturity not to distract the driver or otherwise need direct supervision during the journey.

Transport by Private Car

For some visits parents or teachers may be asked to carry pupils in their own cars, either as the main means of transport to the venue, or in an emergency (for example to transport a pupil with a minor injury to hospital).

The following precautions should be taken:

- Vehicles in which children are being transported, and the driver of those vehicles, must be adequately insured.
- Seat belts should be worn at all times, and booster seats or cushions used where the law requires.
- The parents of all pupils who will be carried by car must be informed that this is the transport arrangement, and give their consent accordingly.
- The situation where one adult is carrying one pupil in their car should be avoided, except in an emergency, or where the driver is the pupil's own parent.

The CRB checking of parents or volunteer helpers must be followed.

The guidance above with regard to driving and supervising pupils at the same time also applies. If there is doubt about the behaviour of certain pupils, then they should travel with a teacher in whose presence they will behave, or in a vehicle with two adults, one who can drive and a second who can supervise.

Transport by Coach

Only coaches provided by reputable companies, with experience transporting school parties, should be used.

Only coaches that provide seat belts for all participants should be used.

Whilst the coach is being driven, staff should move from their own seats only in exceptional circumstances (for example, to deal with serious misbehaviour).

Luggage should not be carried inside the coach other than in lockers or shelves provided.

Safety considerations in the event of a breakdown

Pupils can be placed at additional risk in the event of a breakdown of transport, particularly if the breakdown occurs on a motorway or busy road and it is not possible for the vehicle to be removed from the road.

In most circumstances the safest course of action in the event of a breakdown of a coach or other vehicle carrying pupils is for the pupils to disembark. They should assemble in a safe location, away from the road and the vehicle.

There will be circumstances, however, when this will not be a safe option. The vehicle may have broken down in a position from which it is not safe to disembark.

There may be no assembly area away from the road to which pupils can safely walk. If the breakdown has occurred in poor weather or at night it may not be safe for pupils to wait outside for a prolonged period. In these circumstances, the appropriate course of action is normally for pupils to stay in the vehicle. In the case where the vehicle has been able to reach a safe location, such as an off-road lay by, it is also, of course, normally safe for pupils to remain on board.

A coach driver is responsible for the safety of the vehicle, and the safety of the passengers whilst on the coach. The driver would normally expect to make the decision whether the passengers should disembark following a breakdown.

However, where a school party is involved, the teacher in charge, who will have the greater knowledge of the pupils' ability to cope in the circumstances, should expect to be consulted before the decision is made.

In the event of a coach breakdown in a potentially hazardous location, police forces in the UK would generally encourage a 999 call to be made. The caller should indicate that the call refers to a breakdown, rather than an accident, and the police will determine whether, and with what urgency, to despatch a patrol vehicle to the scene.

Code of Conduct

A written code of conduct for pupils, with clearly defined sanctions for transgression, is strongly recommended for residential visits. With older pupils, especially, this is best established in discussion with the pupils themselves as part of the preparation for the visit. In this way pupils will feel they have a degree of ownership of the code and are more likely to respect it.

A parents' meeting provides an opportunity to re-emphasise, with pupils and parents, the code of conduct and the general standard of behaviour that will be expected during the visit. Parents should be reminded of their responsibility to reinforce the code of conduct prior to the visit and encouraged to accept a shared responsibility with staff for their child's behaviour. Pupils should appreciate that any transgressions are contrary to their parents' as well as their teachers' wishes. This is particularly relevant in relation to any periods when pupils will be unaccompanied during the visit. If the sanction of "sending home" is contemplated, pupils and parents should be forewarned of this.

Smoking and Alcohol

A complete ban on smoking and alcohol is applied as all pupils at the school are under the legal age. The school will automatically apply a no smoking and drinking rule.

Under no circumstances should staff offer alcohol or tobacco products to pupils as this may undermine parental instructions to the pupil concerned. Neither should offers of alcohol or tobacco from pupils be accepted, as this implies that reciprocation is expected.

Staffing

Staff on residential visits need periods of rest whereas pupils may need 24 hour supervision. A higher ratio of staff to pupils will normally be required than for day visits.

Depending on the number of staff participating in the visit, back-up arrangements may need to be in place to ensure that in the event of the incapacity of a staff member during the visit he or she can be replaced. This will be particularly important if the visit has only the minimum number of staff required, or where there is only one staff member of either gender.

On many residential visits, staff will be giving all or much of their time in a voluntary capacity, and the opportunity, at appropriate times, to socialise and relax in the company of colleagues will be greatly appreciated. Some designated "free time" for staff is normally appropriate and it can be helpful to identify this in

the provisional programme for the visit. Staff should understand that at other times they are “on call” even if not actually supervising pupils, and that the visit leader may in an emergency, need to call on support from staff even in periods designated as “free time”.

Staff may need to accept certain constraints on how free time can be used. The school will expect that staff do not smoke in the presence of pupils at any time, and do not drink alcohol in the presence of pupils other than, exceptionally, when older pupils are also permitted to drink. The consumption of alcohol by staff during free time, if permitted, should be in moderation, and must not impact on their ability to take responsibility for pupils when they are next on duty, or their ability to assist immediately in an emergency. The conduct of staff at all times, whether or not on duty, should set an example to pupils and reflect positively on the school.

EMERGENCY PLANNING

Despite good planning and leadership, unforeseen emergencies occasionally arise. Such eventualities should be prepared for, so that in the stressful event of a serious incident the best course of action will be taken by everyone involved.

The emergency situations range from relatively minor incidents that nonetheless require additional staffing support (for example where a pupil needs to be taken to hospital) to serious accidents or medical emergencies, possibly involving a number of members of the party.

PLANNING

As part of the planning process, the visit leader should ensure that:

- All participants have access to first aid equipment, and a nominated person with first aid knowledge throughout the visit. (The more remote the location, the higher the level of first aid knowledge required)
- The means of summoning the emergency services at any stage during the visit has been identified
- All group leaders know the location of the nearest accident and emergency hospital
- Any pupils under remote supervision have a means of making contact with their group leader in the event of an emergency
- Group leaders have a means of contacting the visit leader or deputy throughout the visit (or failing that of making direct contact with one of the emergency home contacts)

- Group leaders have access to any medical information about pupils in their charge that is pertinent to their treatment in an emergency
- A means of obtaining additional emergency funds is available should this be required.

The possibility that staff may need to be redeployed to assist in an emergency should be considered by the visit leader in planning the deployment of staff and pupils during the visit. It is however accepted that, in an emergency, it may sometimes be necessary to leave pupils in larger groups with a single member of staff than would normally be advised or, exceptionally, to leave pupils unaccompanied who would normally be directly supervised by a member of staff. If staffing for a visit is at minimum levels, a plan should be in place to provide additional staffing support if required in an emergency. Normally this will entail identifying an experienced teacher to be on standby, able to travel to the venue at short notice.

The headteacher should additionally ensure that:

- A reliable means for the school to contact the visit leader in an emergency is identified. This may be by mobile phone, subject to the considerations noted below, or via a landline number at the venue. In the latter case more than one number may be required if more than one venue is to be visited; otherwise a single contact number should be identified. For Type 2 visits a record of this number is required on Form EV/07. Where possible, this number should not be the same as the number issued to parents for emergency contact with their child. In a serious emergency the number previously issued to parents is likely to become jammed.
- A reliable means for the visit leader to contact the school in an emergency is established. The school's main switchboard number may not provide this, particularly if it switches to answer phone mode in busy periods. The school switchboard may also become jammed in the event of a serious emergency.

For visits extending outside school hours, two emergency home contacts must be identified (normally the headteacher and another member of the school's leadership team) who can between them provide, as far as is reasonably practicable, 24 hour telephone access for the visit leader for the duration of the visit. For Type 2 visits, a record of the emergency home contact numbers is required on Form EV/07. Mobile numbers may be used for this purpose, subject to the considerations noted below.

- Both home contacts know the procedure for alerting senior County officers in the event of a serious incident that is likely to require additional support or receive media attention.
- A list of participants, including staff, with contact arrangements for parents or next of kin, is available to both home contacts. A copy should also be taken on the visit.

The headteacher may want to advise the visit leader under what circumstances the emergency contact procedure should be used (see the following section).

Alternative arrangements may be appropriate for non-emergency situations such as travel delays.

Mobile Phones

Mobile phones are increasingly able to provide a valuable means of communication during a visit. It is, however, unwise to rely upon mobile phones as the sole method of communication in an emergency, unless it has been established, prior to the visit, that mobile phone reception is totally reliable in the area to be visited. Remember also, that even where transmission is totally reliable; mobile phones must be kept charged, switched on, and in credit. Mobile phone use can be detrimental and clear instructions should be given about their use.

IN THE EVENT OF AN EMERGENCY

Parents should have signed the Parental Consent and Medical form and therefore agreed to leaders acting on their behalf in respect to any emergency medical treatment needing to be given. Leaders will always endeavour to contact the parents using the emergency contact information.

The following course of action should be taken by the group leader. Assistance will be required either from adult helpers or members of the group. (It may be helpful to identify in advance which responsibilities will be delegated to whom.)

- Assess the situation. Establish who is involved and the likely extent of any injuries.
- Immediately inform assistant staff of the emergency.
- Ensure all uninjured group members are accounted for, safe and supervised.
- Attend to any casualties. Arrange for first aid treatment and the summoning of the emergency services if required.
- Arrange for other group members to be given as much information as they need to know about what has happened.

- Make contact with the visit leader if possible.
The visit leader (or if unobtainable, the group leader) should then:
- Reallocate staffing, if available, to assist with the incident
- Ensure that, wherever possible, any casualties are accompanied to hospital by an adult known to them
- If appropriate, alert the emergency home contact
- Ensure that the rest of the party remain cared for, appropriately informed and re-assured
- Make a brief written record of the relevant facts and any witness details and keep a written account of events, times and contacts after the incident.

INFORMATION AND COMMUNICATION

In the event of a serious incident, media response is likely to be very quick. Action is necessary to ensure that the parents of those involved are informed through appropriate channels before the incident becomes public knowledge. It is also important to direct media attention away from the visit leader who will have other responsibilities. To this end:

- Participants should not telephone home, at least until the emergency home contact has been alerted
- The names of injured participants must not be released other than to officials of the emergency services
- All requests for information from the media should be referred to the emergency home contact.

A wish to telephone home during an emergency will be a natural reaction particularly if participants possess mobile phones. It will be necessary to explain carefully to pupils and staff the reason why they should not do this. This is the overriding importance of preventing the parents of any seriously injured casualty being contacted by the media, or the friends or family of other participants, before they have been accurately informed of the situation through official channels.

The emergency home contact has the responsibility of alerting the parents of any casualties. If the incident has attracted media attention the parents of all other participants should also be contacted and accurately informed of the situation as soon as possible.

Note that neither the visit leader, members of the party, nor the emergency home contact should enter into any discussions with other parties regarding legal liability.

Incident daily review

It is a good idea for staff to complete a daily report of any minor incidences e.g. giving medication or problems between pupils; this can then be used to follow up any attention to a problem raised by parents on your return.

Trip Review

The Trip leader on their return should complete a review form, giving feedback on the validity and effectiveness of the trip; this is good to do if a similar trip is to take place with other staff leading.

APPENDIX 2: LEGAL REQUIREMENTS

This appendix explains the aspects of statute and common law which have implications in the organisation of educational visits.

1 THE HEALTH AND SAFETY AT WORK ACT (1974)

The Health and Safety at Work Act places obligations upon employers to safeguard employees and other persons whose health and safety may be a risk as a result of their business.

1.1 The Health and Safety (First Aid) Regulations 1981

The Health and Safety (First Aid) Regulations 1981 apply only to employees, but equivalent responsibilities for pupils derive from the common law duty of care which falls upon all those who have responsibility for the care of children and young people.

1.2 The Management of Health and Safety at Work Regulations 1999

These regulations place, amongst others, the following obligations upon employers

- To conduct, periodically, an assessment of the risks to the health and safety of employees, and other persons, which arise out of the employer's business
- To implement and monitor appropriate measures to control any significant risks which this risk assessment identifies

- To make appropriate arrangements for the management of health and safety
- To maintain appropriate procedures for dealing with emergencies
- To provide employees with relevant health and safety information.

In assessing the risks to its employees and others (primarily pupils), the School has identified educational visits as an area where the risks are sufficient to warrant the implementation of the specific procedures, regulations and guidance. In general, the actions of school governors, the headteacher and visit organiser will comply with the Management of Health and Safety at Work Regulations.

The Headteacher and teachers should note that the Health and Safety at Work Regulations 1992 also place obligations upon **employees**. Employees are obliged to take whatever immediate and common sense actions they can to prevent incidents occurring, and to report any health and safety concerns they have to their supervisor or line manager.

Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995

These regulations require employers to report to the Health and Safety Executive all incidents that result in one or more persons receiving hospital treatment.

Following any such incident the headteacher/EVC must ensure that an incident report is completed.

THE ACTIVITY CENTRES (YOUNG PERSONS' SAFETY) ACT 1995

This Act provides for the inspection and licensing of providers of certain adventurous outdoor activities. The categories of provider which require to be licensed, and the range of activities in scope, are defined in the Adventure Activities Licensing Regulations 2004.

Categories of provider which require to be licensed

In general, adventure activity providers are required to be licensed where:

- They provide one or more of the specified activities
- Instruction or leadership in the activity forms part of the provision
- They provide the activity to young people under 18, and
- The activity is provided in return for payment.

Activities within Scope

The range of activities within scope is limited, and is narrower than the range of activities classified as "adventurous". Broadly, the activities within scope are as follows:

- Trekking, defined as travel on foot, cycle, ski or horseback on remote moorland or mountainous terrain

- Water sports, defined as canoeing, rafting, sailing or windsurfing on the sea or other tidal waters, on rapid rivers or on larger inland lakes or reservoirs
- Climbing and abseiling on natural crags or buildings (but not on purpose built climbing walls)
- Caving and mine exploration.

Implications for the school

The chief implications are for the school visiting commercial or independent adventure activity centres. Such centres, in general, are required to be licensed.

In general, the regulations also prevent freelance instructors or voluntary activity clubs offering leadership or instruction in the specified activities to school pupils in return for payment, unless they hold a licence to do so.

The school does not need a licence to provide activities for its own pupils where the activities are supervised by school staff.

Although the school does not need a licence to provide the specified activities to our pupils, the expectation of parents will be that the safety arrangements for such activities will be no less robust than those which the licensing regulations require.

COMMON LAW

The Responsibility of Group leaders

To contravene common law there must be an incidence of negligence.

Negligence can only be established where there exists a “duty of care”; where damage has occurred to someone to whom that duty of care extends; and where that damage is a reasonably foreseeable consequence of the negligence.

Group leaders who accept responsibility for pupils participating in an educational visit have a common law duty of care towards the pupils in their care. To discharge this duty group leaders must:

- ensure that their actions are compatible with those expected of a careful and prudent parent
- ensure that their actions take account of the age and known propensities of particular children
- exercise sound judgement, commensurate with their knowledge, experience and training
- ensure that their actions are in line with well developed and accepted practice.

Provided that a group leader is considered to have fulfilled these obligations, he or she should be secure against any claim of negligence arising from an incident to

a pupil in his or her care the only exception would be where an accident is proved to have resulted from an infringement of criminal law, such as driving in excess of the speed limit or whilst under the influence of alcohol.

In deciding whether the leader has exercised sound judgement, a court would take into account the leader's knowledge, experience and training. In general, a higher standard is expected of the more experienced. In particular, a higher standard is expected of a qualified teacher than an adult helper. If an accident resulted from a group leader's lack of training or experience, then part, at least, of the responsibility would be considered to rest with the visit leader or headteacher/EVC who allowed the activity to proceed.

In order to establish what constitutes "well developed and accepted practice" it is normal for the parties to court proceedings to call expert witnesses recommended, for example by the national governing body for the activity concerned. Where an employer has issued regulations and guidance on safe practice, then the leader would also be expected to have taken all reasonable steps to comply with the regulations and act in accordance with the guidance.

Even with all the facts to hand, it is not possible to predict with certainty the decision a court would reach in a claim against the School or an individual employee following an incident that resulted in injury to a pupil.

The Use of External Providers

In the case where a visit leader places pupils temporarily in the care of a third party, such as an instructor at an outdoor centre, then there is no legal certainty in common law as to who holds overall responsibility. In general the responsibility will be held to lie in greater measure with the person who was better informed.

Thus if the accident was due to unsafe practice in the activity, the instructor would generally be held responsible. On the other hand if the accident resulted from a medical condition such as epilepsy, which the visit leader was aware of, but had omitted to communicate to the centre, then the greater responsibility would rest with the visit leader.

There is a responsibility in common law to ensure, as far as possible, that the instructor is suitably skilled and experienced.

SPECIAL EDUCATIONAL NEEDS & DISABILITY (EXTRACT FROM DFES GUIDANCE)

Recent Changes to the law bring educational visits within the scope of disability legislation. From September 2002, changes to the Disability Discrimination Act (1995) place new duties on schools not to discriminate against disabled pupils for reasons relating to their disabilities. Schools are under new duties not to treat disabled pupils less favourably, without justification, than non-disabled pupils;

and to make reasonable adjustments to schools' policies and practices to ensure that disabled pupils are not substantially disadvantaged in comparison with non-disabled pupils.

APPENDIX 12:

ROLE AND RESPONSIBILITIES OF THE EDUCATIONAL VISITS COORDINATOR

This appendix expands upon the statement of responsibilities of the headteacher or educational visits co-ordinator.

NOMINATION OF EDUCATIONAL VISITS CO-ORDINATOR.

The school undertakes educational visits or off-site activities and is therefore required to nominate an educational visits co-ordinator (EVC). The School requirement is that the EVC must be a qualified teacher. It is expected that the EVC will be a senior member of staff, with sound experience in the leadership of educational visits.

The person nominated as EVC must have attended an EVC training course, or, if newly appointed to the role, must attend a course within two terms of appointment.

Certain of the duties of the EVC may be delegated to administrative staff, for example insurance arrangements. However, the headteacher or nominated EVC retains responsibility. Administrative staff who undertake these duties may attend the EVC training course in addition to, but not instead of, the nominated EVC.

The School may choose to delegate some of the following responsibilities to a nominated EVC, while certain responsibilities are retained by the headteacher, for example approving visit leaders or liaising with the governing body.

Although, the EVC's primary role is to oversee the safe organisation of visits, the person appointed will also, ideally, act as a champion for education outside the classroom.

In the remainder of this section, the term "EVC" is used, recognising that all or some of the responsibilities may be taken by the headteacher.

RESPONSIBILITIES OF THE EDUCATIONAL VISITS CO-ORDINATOR

The EVC has the following responsibilities:

Visit planning

EVC should support visit leaders, particularly those who are less experienced, to ensure that visits are well-organised and that school requirements are met.

The EVC should ensure that visit leaders are able to allocate the time required to organise the visit properly, including recci visits where appropriate.

Risk Assessment

The EVC should receive copies of the risk assessments for all visits or off-site activities organised by the school. These should be monitored as necessary to ensure that the assessments are sufficient and appropriate for the activities being undertaken. EVCs will need to work closely in support of visit leaders who are less experienced to ensure the risk assessment process is undertaken effectively.

The EVC may, in consultation with other staff, prepare generic school procedures for certain aspects of educational visits. A common example would be a set of generic procedures covering coach travel, applicable to all occasions when parties from the school travel by coach. These may be referred to and form part of the risk assessment for all visits for which they are appropriate. The visit leader, with the EVC, must check that these procedures are understood, and cover all the significant risks for that aspect of the visit, particularly if the visit concerned presents special circumstances, for example the inclusion of pupils with special needs or challenging behaviour.

Staff Ratios

It is the EVC's responsibility to ensure that visits are adequately staffed, taking account of the nature of the activities to be undertaken and the pupils in the party.

Remember that the ratios specified are minimum figures. Frequently the risk assessment will indicate that a higher ratio of staff to pupils will be required.

Competence of visit leaders and assistant staff.

EVCs must assure themselves that visit leaders are competent to take charge of the visit proposed. Normally the visit leader should have had prior experience, at least as an assistant leader, on a similar visit.

Assistant staff may not have had prior experience of visits of the type proposed, but at least one assistant should be competent to deputise for the leader should the leader become incapacitated for any reason.

Staff who are not teachers or teaching assistants (e.g. parent helpers), must be acceptable to the school in the role that they will be asked to fill, and must understand and be willing to accept their responsibilities. Parents and school helpers will need to have been CRB checked before attending the visit/trip.

The EVC should also have regard to the nature of the pupils on the visit and ensure that the staffing takes account of this, particularly if pupils with special needs or challenging behaviour are included. There must be at least one teacher

on the staff for the visit to whose discipline the most challenging pupils can be expected to respond.

Information for parents and parental consent

The EVC must ensure that the Schools requirements with respect to informing parents and obtaining their consent are followed. The EVC may choose to attend a parents briefing where one is held, particularly if the visit leader is relatively inexperienced.

Insurance and Indemnity

The EVC must ensure that the Schools requirements relating to insurance and Indemnity for type 2 visits is observed.

Emergency planning

The EVC should ensure that the relevant emergency planning arrangements are operative for all visits.

Two emergency home contacts, normally the headteacher or other members of the senior leadership team, must be identified for each visit that extends outside school hours. Their contact numbers must be notified to the visit leader, and, for Type 2 visits, entered on Form EV/07. The EVC should also ensure that the means of making emergency contact with the party during the visit is identified, and, for Type 2 visits, entered on form EV/07.

The EVC should check that both home contacts nominated understand their responsibilities and will be available to respond during the period of the visit. Each contact must be familiar with the school's emergency plan and have the information required to contact the School in the event of a serious incident.

The EVC should check that copies of the list of pupils participating, together with their parental contact information, are taken on the visit, and kept at school, and are available to the emergency home contacts.

It is good practice for the EVC occasionally to test the emergency contact arrangements, for example by telephoning the home contacts while a visit is taking place. EVCs may also find it worthwhile to make contact with the visit leader once or more during a residential visit, both to check that this contact arrangement is effective, and to let the visit leader know that their work is supported back at school.

Monitoring

The EVC should monitor the conduct of visits organised by the school. This might be done by any or all of the following means:

- Checking approval forms
- Checking risk assessments

- Attending staff and/or parents briefings
- Observing visits in the field (for example by being part of the staff team).
- Reviewing with staff after the visit, and/or receiving reports. (All incident or near miss reports relating to educational visits should be seen by the EVC).

The EVC should prioritise, normally monitoring more closely where visit leaders are less experienced, but not forgetting that even visits that have been run for many years may still raise concerns. It may not be possible for the EVC to observe more than a small sample of visits in the field. However, if there are concerns, this should be done. Other experienced colleagues may be able to assist with this task. The EVC should periodically review the schools procedures for managing visits and recommend changes, through the headteacher.

The EVC is encouraged to introduce forms and other paperwork internal to the school to support and assist in monitoring visits. However, in order not to discourage visits, paperwork should not exceed that required to ensure safe practice and adequate monitoring.

Staff training and induction

The EVC should oversee the induction and training of staff involved in educational visits. The following approaches may be considered:

- Giving whole staff briefings
- Contributing to the induction programme for new staff
- Encouraging the “apprentice model” – encouraging new staff keen to become involved in educational visits to act as assistants to experienced visit leaders.

This is particularly important in planning for the continuation of a visit programme after a key member of staff leaves.

- Attending briefing/debriefings with the staff teams for educational visits to reinforce

good practice and encourage feedback

- Organising collective training (eg First Aid)
- Recommending colleagues to attend training courses
- Keeping records of staff training and experience in educational visits.

In the above ways, and in many others, the EVC can have an important role in encouraging staff to appreciate the value of educational visits and become more involved in learning outside the classroom.

APPENDIX 10:

INCLUSION OF PUPILS WITH DISABILITIES OR CHALLENGING BEHAVIOUR

This appendix is intended to offer guidance to schools in relation to the inclusion on educational visits of pupils who fall into one of the following categories:

- Pupils with disabilities that may necessitate adjustments being made to the organisation of the visit to enable them to participate.
- Pupils with a history of challenging behaviour that may, if not adequately supported and addressed, impact adversely on the success or safe organisation of the visit.

The benefits which young people gain through participation in educational visits and out of-school activities are widely acknowledged. Young people with disabilities, in particular, can gain a great deal from the opportunities that educational visits provide to take part in challenging activities, broaden their horizons, develop friendships and become more closely involved in the school community. Young people who exhibit challenging behaviour can also learn important lessons from the experience of living and working away from home with their peers. The boost in self-esteem which can come from doing well at new, exciting activities in the company of their teachers and peers, can sometimes be the spur that turns their behaviour around.

This guidance is intended to support teachers and schools in including all pupils who will benefit from educational visits. It does, however, also clarify the circumstances in which it may legally permitted, and appropriate, to exclude pupils whose disabilities may present a danger to themselves and others, or whose behaviour is likely to be seriously disruptive and prejudicial to the safe conduct of the visit.

Different considerations obviously apply to pupils with disabilities as opposed to those who exhibit challenging behaviour. However, there are also a number of important considerations in common, particularly with respect to the implications of current disability discrimination legislation. For this reason only, these two aspects have been brought together in this document. Although, as indicated below, some pupils exhibit challenging behaviour that is linked to a recognised disability, such as ADHD, no suggestion is implied that disabled pupils, in general, are less well behaved than their peers.

The first part of this guidance focuses on common aspects and considers legal considerations. Part 2 contains more detailed practical guidance and is split between guidance on including disabled pupils and guidance on working with those who exhibit challenging behaviour.

1 LEGAL CONSIDERATIONS AND COUNTY REGULATIONS

The following issues are addressed in this part of the guidance:

- The implications of current disability discrimination legislation.
- Risk assessment and adjustments for pupils with disabilities or challenging behaviour.
- Financial considerations.
- Support for schools, staff and pupils taking part in educational visits.
- Liaison with and involvement of parents.
- Liaison with providers.
- Exclusion of pupils from visits.

The guidance is intended to apply to the full range of educational visits and off-site activities undertaken by the school.

The implications of current disability discrimination legislation

The relevant legislation is contained within the Disability Discrimination Act 1995 and the Special Educational Needs and Disability Act 2001. This is referred to as “the legislation” in the remainder of this section. For a fuller guide to the implications for schools of this legislation, please refer to the “Code of Practice for Schools” published by the Disability Rights Commission in 2002. This contains a number of examples and case studies relevant to educational visits.

1.1.1 Who does the legislation defined as disabled?

The legislation defines a disabled person as one who has a physical or mental impairment that has a substantial, long-term and adverse effect on their ability to carry out normal day-to-day activities. Physical or mental impairment includes sensory impairments, learning difficulties and medical conditions such as diabetes or epilepsy.

The legislation also applies in certain circumstances to pupils who exhibit challenging behaviour. This will be the case, for example, where a pupil has an underlying medical condition, such as ADHD, that manifests itself in behavioural difficulties that are sufficiently substantial and long-term as to constitute a disability.

On the other hand, a pupil’s challenging behaviour may result from social, environmental or other circumstances that do not amount to a physical or mental impairment as defined above. In these cases their behaviour would not be regarded as relating to a disability, and the legislation does not apply. Schools are advised, however, to be cautious of assuming that the legislation does not apply to

a pupil who exhibits regular and long term challenging behaviour, particularly as

this is likely to have been well documented by the school. It is possible that a tribunal or court of law might consider that the school should reasonably have been aware of the likelihood of an underlying medical cause.

Disabled pupils are entitled to the protection from discrimination enshrined in the legislation whether their disability manifests itself in a physical or mental impairment, or in challenging behaviour. However, schools should also note the 168

guidance in Section 1.7 below which clarifies the circumstances in which pupils whose inclusion is likely to be prejudicial to the safe conduct of an educational visit

may be excluded, even where the legislation applies.

Disability, as defined by the legislation, is not the same as having a Statement of Special Educational Needs. There will be some SEN pupils that the legislation does not classify as disabled, and some pupils that the legislation does classify as disabled who have no Statement of Special Educational Needs.

1.1.2 What does the legislation require?

The principle behind the legislation is that, wherever possible, disabled people should have the same opportunities as non-disabled people in their access to education.

It is therefore unlawful to discriminate, “without justification”, against disabled pupils or prospective pupils in any aspect of school life, including opportunities to participate in educational visits. The two key duties are:

- not to treat disabled pupils less favourably, for reasons relating to their disability,
- to make “reasonable adjustments” to avoid putting disabled pupils at a substantial disadvantage.

What might constitute “justification” for less favourable treatment, and what is implied by the term “reasonable adjustment” is addressed in section 1.7 below.

A key feature of the legislation is that these duties are anticipatory. As with other aspects of educational provision, schools are expected to consider the organisation of educational visits in the expectation that disabled pupils might wish

to participate. This applies even if there are no disabled pupils currently at the school, or if there are pupils with disabilities of which the school is currently unaware.

The legislation does, however, allow schools to discriminate, in permitted circumstances, on the basis of ability. A school may, for example, organise a

sporting visit exclusively for those who have reached the standard required for selection to participate.

The legislation does not require activities to be adjusted for all pupils so that a disabled pupil may participate. It is permitted to offer a choice of activities at the same time, some of which may not be accessible to a disabled pupil, provided that the different activities offered are of comparable educational value, and at least one of the options offered is accessible to all pupils.

1.2 Risk Assessment

General guidance on risk assessment in relation to educational visits is included in [Chapter E](#) of this handbook.

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A key aspect of risk assessment for educational visits is to identify any significant risks associated with the particular pupils participating in the visit, and ensure that

appropriate precautions are in place to manage these risks acceptably.

Precautions that schools should consider in order to permit the safe participation of pupils with disabilities or challenging behaviour include the following. In the language of the legislation these form part of the “reasonable adjustments” that schools would be expected to make.

- Allocating staff to the visit who have the skills, training or experience required to support and supervise the pupil(s) concerned.
- Allocating sufficient staff to enable all pupils to participate and have their needs met, including provision for one-to-one supervision of individual pupils if required.
- Ensuring that the facilities to be visited and transport to be used have safe access for those with disabilities.
- Identifying hazards in buildings or the outdoor environment that pose a greater risk to disabled pupils and making appropriate adjustments (eg barriers, extra supervision, alternative routes, or alternative venues).
- Preparing the pupils for the visit so that they understand the importance of following the code of conduct and obeying instructions in situations where their safety, or the safety of others, might otherwise be compromised.

Reconnaissance visits are obviously more important where disabled pupils are included in the party. If a visit is repeated to the same venue every year, it may be possible to consider the above points during the previous year’s visit in anticipation

of the inclusion of a disabled pupil in the following year's party. In many circumstances, a school will be aware for several years prior to a visit that adjustments for a particular disabled pupil are likely to be necessary, and can start the process of planning at a very early stage.

A commonly asked question is whether a risk assessment can be used as justification for reaching the decision that a pupil cannot safely participate in a visit.

This is addressed in section 1.7 below.

1.3 Financial Considerations

Making the adjustments necessary to accommodate disabled pupils on educational visits may result in schools incurring additional costs. Generally, schools should be able to meet these costs from within the whole school delegated budget, which includes funding specifically identified to address special educational needs. Schools may, however, need to consider other sources of funding.

Most schools try to keep the costs of visits down so that as many pupils as possible may participate. The more expensive the visit per head, the greater is likely to be the cost of making adjustments, such as additional staffing, to accommodate disabled pupils. To meet some educational objectives, study of 170

foreign languages or cultures for example, it may be necessary to travel to distant locations that involve additional costs. However, if the same quality of learning can

be achieved using less expensive destinations, accommodation or activities, then this will facilitate the inclusion of all pupils who will benefit, including those with disabilities.

It is not lawful to levy an additional charge on the parents of pupils with disabilities

to cover the additional costs of their participation. Where visits are funded through

voluntary contributions it *is* permissible to include a small mark-up in the contribution requested from all parents to cover the additional costs. In order not to

discriminate against the parents of pupils in year groups or classes that include disabled pupils, schools might wish to consider establishing a standing fund for this purpose and adding a small increment to the contribution requested for all visits, whether or not disabled pupils participate. This is compatible with the

“anticipatory” principle in the legislation

[Appendix 4](#) of this handbook contains guidance on the current regulations on charging for educational visits.

1.4 Support for Schools, Staff and Pupils Participating in Educational Visits

Understandably, staff may have concerns about their additional responsibilities when leading educational visits. They may be worried about the situation in which they could find themselves in the event of an accident or medical emergency.

In certain circumstances, they may feel that they cannot go ahead with a visit if particular pupils participate. They may be concerned that the pupils’ behaviour is likely to put themselves or other pupils at risk, or the pupils may have disabilities that staff feel unqualified to deal with in an out of school or residential situation. In the majority of cases, teachers and support staff are not contractually obliged to

participate in educational visits. Where visits are residential, or extend beyond the

school day, staff give a proportion of their time on an entirely voluntary basis. If staff decline to take part in a visit because of concerns about a particular pupil a likely outcome is that the visit will not take place. At best, all the pupils may be denied a valuable opportunity. At worst, there may be a temptation for the disabled

pupil concerned to be made a scapegoat.

In order to avoid this situation measures that support schools and staff and build their confidence are vital.

It is important to reassure staff that they are not necessarily to blame if an accident

or emergency occurs. Provided a risk assessment has been undertaken which addresses the reasonably foreseeable risks, and the precautions identified have been followed conscientiously, an incident arising from circumstances which were not foreseen is likely to be judged an incident for which no-one was to blame.

Even where circumstances that might lead to an accident or emergency are anticipated, and failsafe precautions are not available, it is still valid to balance the

risks to pupils against the benefits of their participation in the activity.

Participation

in an educational visit by pupils who, for example, exhibit challenging or unpredictable behaviour may, despite the precautions in place, still pose a risk to

their safety. However, these pupils' participation may bring significant benefits that

may be judged as justifying the residual risk that exists. This is particularly relevant

if the young people concerned are at risk of involvement in crime or other "unsafe"

lifestyles, and there are clear preventative benefits in engaging with them.

Staff should also be aware that there are many circumstances in which it remains perfectly lawful to exclude or withdraw pupils from visits for reasons associated with their behaviour. These are addressed in paragraph 1.7 below.

Should an incident occur, and a claim be made by a pupil or parent, it is likely that the claim would be against the County Council rather than an individual teacher or

school. In the unlikely event that a civil action is taken against an individual County

Council employee, the Council's employee liability policy will indemnify the employee against any financial liability resulting from the claim. This indemnity is also extended to staff working in voluntary aided schools. Further guidance in relation to this is contained in [Appendix 3](#) of this handbook.

1.5 Liaison with and involvement of parents

General guidelines on liaison with parents prior to an educational visit are given in [Chapter F](#) of this handbook. Where pupils with disabilities or those with behavioural problems are involved certain aspects take on increased importance.

For pupils with physical disabilities or special medical needs the school should already be aware of their needs during the day in the normal school environment. Prior to educational visits additional information must be sought from parents relating to care overnight (if the visit is residential), on transport and in the different

environments to be visited. Early liaison with parents is vital, both to re-assure the parents and to ensure that appropriate arrangements are considered in good time.

For pupils with challenging behaviour, it is especially important to follow the guidance with regard to codes of conduct. Ensure that parents are aware of the standard of behaviour expected on the visit and have been given a copy of the code of conduct if one is drawn up. The County parental consent form requires parents to sign that they have read any information of this nature provided, and undertake to re-enforce it with their child. This is a significant protection against

subsequent complaints by parents that their child has been “allowed” to misbehave during the visit.

A failsafe means of contacting parents in an emergency must be established.

Parents should be informed that the school may need to contact them at any time during the visit and that in certain circumstances the parents may need to resume responsibility for their child before the scheduled end of the visit. If parents are not

available for any period during the visit, they must nominate an alternative carer who can take this responsibility. It is permissible to make this a condition of participation *provided it applies to all pupils*. If parents might be required to travel to the venue to take responsibility for their child this must be clear in the information sent to them prior to the visit.

In many cases the parents of a disabled child may wish to transport their child to the venue and/or accompany their child on the visit, thus relieving the school of 172

some pastoral responsibilities. In primary schools, in particular, the disabled child’s

parent may be just one of a number of parents assisting with the visit. However, schools should try to ensure that the parent’s presence does not overly detract from the value of the visit for the disabled child, for example if one of the objectives

is to promote pupils’ independence.

It is not lawful to require the attendance of a disabled pupil’s parents as a condition

of participation in the visit. This amounts to less favourable treatment for the disabled pupil for a reason relating to his or her disability. It cannot therefore be an

expectation on the school’s part that parents will assist as described above. If parents are unable or prefer not to assist in this way then the school is responsible

for providing alternative competent adult supervision.

1.6 Liaison with Providers

General guidance on liaison with providers of facilities, activities, transport or accommodation for educational visits is included in the [Chapter J](#) of this handbook.

In respect of disabled pupils or pupil’s exhibiting challenging behaviour, it is important to keep the provider informed of any difficulties you envisage so that

they make any necessary adjustments.

Issues of confidentiality sometimes arise in this context. While it may be appropriate not to divulge the names of individual pupils with disabilities, it is vital

that providers are aware that pupils with particular disabilities will be included in the party, if these disabilities could present safety concerns. Reputable providers will often ask to be informed specifically in relation to disabilities or medical conditions that they know require them to provide modified facilities or take additional precautions.

Note that the above paragraph does not apply in relation to HIV/Aids. The law protects people with HIV from any requirement to divulge their condition. For this reason, it should be assumed that all young people may be carriers of blood borne

viruses and appropriate precautions taken.

1.7 Exclusion of pupils from visits

It is not the purpose of this guidance to encourage the exclusion of pupils from visits. In general the risk assessment process should facilitate planning so that pupils can be safely included, rather than serving as a barrier to their inclusion. However, there are some circumstances, particularly in relation to pupils who exhibit challenging behaviour, when their exclusion may be justified.

1.7.1 Exclusion prior to the visit

A frequently asked question is whether schools may legally exclude pupils from a visit where, because of their disability or challenging behaviour, the school feels it would be unsafe or inappropriate for them to participate.

To deal first with pupils who exhibit challenging behaviour that is not related to disability (see section 1.1 above). If the risk assessment for a visit indicates that it

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would be unsafe for a pupil in this category to participate, then he or she may be excluded for this reason, without reference to the disability discrimination legislation.

It is also lawful, where behaviour is not linked to disability, to refuse access to a visit as a sanction for misbehaviour or permit participation as a reward for good behaviour, provided that pupils are not denied access to an essential component of the curriculum. Such actions can be taken as part of the school's behaviour management policy. If this is contemplated, it is wise to inform parents in advance.

However, if a pupil *is* classified as disabled then the disability discrimination

legislation applies. Schools may not exclude disabled pupils from educational visits, for reasons related to their disability, without taking proper account of the legislation. This also applies to excluding a pupil because of their behaviour when that behaviour is linked to their disability.

This does not mean that it is never acceptable to use the findings of a risk assessment to justify a decision to exclude a disabled pupil from participation in a visit or off-site activity. Under certain circumstances the legislation does permit this. However, in order to justify reaching this conclusion, schools would be expected to have taken the following actions in good faith, and kept records that they have done so:

- Anticipated any difficulties that disabled pupils might have in accessing the visit at all stages of planning, not just after pupils had been recruited
- Considered adjustments which would be necessary to safely accommodate the disabled pupil in the planned activities, such as additional staffing or specialised equipment or facilities, and come to the conclusion that these were either impractical or unreasonably costly
- Considered adaptations to the plans for the visit which might have permitted the disabled pupil to participate, for example a change of venue or different choice of activities, and come to the conclusion that no changes of this nature were practicable, or that such adaptations could not be made without substantially disadvantaging the other pupils participating in the visit.

If a decision is made to exclude a disabled pupil from a visit in school time, the school is obliged to provide an alternative activity for the pupil which is, as far as possible, of comparable educational value.

For pupils with medical conditions that may be prejudicial to their safety on the visit, confirmation should be sought from the pupil's doctor that it is safe for them to travel. Doctor's advice to the contrary may always be taken as justification for not including the pupil on the visit.

1.7.2 During the visit

A decision may need to be made during a visit that a pupil should be withdrawn from an activity, or sent home from the visit entirely. As above, where this is because of unacceptable behaviour not related to disability, there is no legal

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impediment to doing this. It may be the best course of action for both the pupil concerned and the remainder of the party.

In respect of pupils classified as disabled, a decision may need to be made during the visit that an activity which at the planning stage was considered to be safe is

not in fact safe at all, or not safe without additional precautions that cannot be implemented at short notice. Provided that the planning was undertaken in good faith, following the guidance above, it is permissible, and may be essential, to exclude the disabled pupil from the activity on this basis.

Exceptionally, it may become clear during a visit that a disabled pupil's continued participation in the entire visit is prejudicial to their safety, for example because their condition has deteriorated in a way that was not foreseen, or they have failed

to maintain standards of behaviour which were reasonably expected of them. In this case exclusion from the visit and sending home may be both justified and appropriate.

Note that the disability discrimination legislation does not require different treatment for disabled pupils who happen to misbehave, just because they are disabled. It is recognised that disabled pupils may sometimes misbehave in ways that have no connection to their disability at all. In this case there is no reason to treat them differently from non-disabled pupils. If a disabled pupil seriously infringes the code of conduct established for a visit, in a way that would lead to a non-disabled pupil being sent home, then the same sanction should apply, unless the pupil's disability contributed to their behaviour. In this case the above considerations need to be observed.

2 PRACTICAL TIPS

This section contains practical tips for supporting the participation of disabled pupils and pupils exhibiting challenging behaviour on educational visits.

2.1 Practical tips for supporting disabled pupils

The following points are intended as an aide memoir for leaders of educational visits including disabled pupils. A number of the points are also good practice for all educational visits.

- Plan well in advance for the inclusion of disabled pupils. If there is doubt about whether it will be possible for a disabled pupil to participate in all of the activities on offer, do not make a commitment to the pupil or parents until this has been resolved.
- Check that accessible transport to the destination is available, how far in advance it needs to be booked and whether any extra costs are involved. Consider asking local special schools whether they have suitable available transport. Be aware that extra stops may be necessary on the journey to accommodate the needs of disabled pupils.

- Check that venues are accessible, with suitable, accessible toilets and changing areas if required. Take account of hearing and visually impairment as well as physical disabilities and medical conditions. A reconnaissance visit is particularly important where the party includes disabled pupils. Be prepared to consider a change of venue if necessary.
- For residential visits, check that sleeping accommodation is appropriate, including evacuation routes. If required, check that there is accommodation suitable if a pupil needs adult support in the same room overnight.
- Establish where activities will take place, that the activity venues are accessible, and that accessible transport to the venues is available if required.
- If using an activity provider, such as a field study or adventure centre, ascertain before booking that they are willing and able to accommodate your disabled pupil(s). Ask if they have experience working with similar pupils (they may be able to provide references). Be prepared to consider using a different provider if necessary.
- Discuss the activity programme in detail with the provider. If certain activity options are unsuitable for a disabled pupil, ensure that there are attractive alternative choices, with appropriate learning outcomes, open to all pupils so that a disabled pupil is not isolated. Do not make assumptions. Some disabled pupils will opt for more adventurous activities if they have the opportunity to do so; equally some non-disabled pupils may prefer a less adventurous option.
- Check that the activity provider is aware of pupils' individual needs, and that this is communicated to the tutors or instructors for each activity. In certain circumstances, to preserve confidentiality, the provider may be happy to be informed that a group contains a pupil with a specified condition, without identifying the individual pupil. (Note also that this advice does not apply to pupils with HIV/Aids – see above)
- Make all information about the visit, for pupils and parents, available in an accessible format.
- Endeavour to meet individually with parents of disabled pupils to ensure that they understand and are happy with the care arrangements for their child and have the opportunity to raise concerns and make suggestions. Discuss with parents how their child's needs can be met in a dignified way that, as far as possible, does not detract from their inclusion in the group. If a pupil may need adult support while toileting, or in the same room overnight, ensure that the parents', and the pupil's, views and agreement are sought, and that any child

protection concerns are considered. Note that liaison with parents is equally important if a parent is accompanying the visit as their child's carer.

- Check that all medical information relating to disabled pupils is fully up to date and available during the visit. Where necessary ensure that the pupils' conditions are monitored during the visit.

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- Take account of the special needs of disabled pupils in conducting your risk assessment for the visit, and seek advice if you are uncertain about safety in relation to particular pupils.

- Ensure that staff accompanying the visit have the necessary knowledge of disabled pupils' needs and receive appropriate training in administering medicine and manual handling if required. If a dedicated care worker is required to accompany a disabled pupil, check that you have adequate backup if that person should become incapacitated, or when he or she needs breaks from duty during the visit.

- Nominate a member of staff to take specific responsibility for each disabled pupil during the visit. This may be a designated carer working one to one, or the leader of the group that includes the disabled pupil. It may be a different person for different periods during the visit. This person is responsible for monitoring the pupil's welfare and safety, and keeping the visit leader informed.

- In drawing up a code of conduct for the visit, be careful not to establish fixed rules that discriminate against disabled pupils. Examples might include a blanket "no swearing" rule for a party including a pupil with Tourette's syndrome, a rule about listening to instructions which discriminates against a pupil with impaired hearing, or a rule relating to attendance on time at meetings which is difficult for a physically disabled pupil to comply with. While, in general, the "same rule for all" is preferable, on occasions, inclusion requires treating people differently, according to their needs.

- Consider the role that other pupils may be able to play in supporting disabled pupils. Sometimes pupils can benefit greatly from the opportunity to assist in this way provided it complements the learning outcomes for the visit.

- Check whether the travel insurance policy for the visit includes cover in relation to pre-existing medical conditions. The County travel insurance policy covers all pre-existing conditions provided the pupil's doctor has confirmed that it is safe for him or her to travel.

2.2 Practical tips for supporting pupils with challenging behaviour

The following points are intended as an aide memoir for leaders of educational visits including pupils who exhibit challenging behaviour. Many of these points are also good practice for all educational visits.

- Choose a venue for the visit which, as far as possible, avoids temptations which could lead more challenging pupils into trouble or danger (eg open water, busy roads, urban centres) and from which “sending home” is a realistic sanction (not too distant and/or public transport available).
- Ensure that the staffing for the visit includes at least one person to whose behaviour management the pupils respond, preferably someone who has already established a sound relationship with the pupils concerned, or someone with a proven record of being able to establish such relationships.

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- Staff the visit sufficiently so that the withdrawal of one or more key members of staff to address behaviour issues does not prejudice the organisation of the visit for the other pupils. In order to keep on top of challenging behaviour, it is vital that the enjoyment of the many is not adversely affected by the behaviour of the few.
- On residential visits, make staff aware that if difficulties arise they will need to be flexible with regard to their own “down-time”, but have sufficient staff so that some down-time is possible for all. Tired staff will be less effective in addressing challenging behaviour.
- Allow time for staff to brief each other on any behaviour issues that may be developing during the visit.
- Plan a structured programme that keeps pupils engaged and “on task”, but permits modification to address behaviour issues if required. Keep pupils’ “down-time” to a minimum and ensure it is effectively supervised.
- Where possible arrange for challenging pupils to work in small activity groups within which they can succeed. If appropriate run an activity several times, on one occasion with smaller activity groups.
- Take every opportunity to praise pupils for their achievements during the visit.
- Consider whether older pupils from the school may be able to play a useful “mentoring” role on the visit working alongside younger pupils with challenging behaviour. There are examples of where this has worked well.
- If using an activity provider (eg an adventure activity centre), discuss with the provider in advance if you have pupils who may exhibit challenging behaviour. This may permit the provider to allocate their staff more effectively, and adapt activities if appropriate. A provider will normally expect each group that

contains challenging pupils to be accompanied throughout by a school staff member to whom they respond who will take full responsibility for pastoral care and discipline.

- Establish a code of conduct for the visit with explicit expectations as to pupil behaviour. Where appropriate, consider developing a “behaviour contract” through negotiation with the pupils attending.
- Ensure the code of conduct is enforced fairly but firmly during the visit. Pupils should be clear in advance about the sanctions to expect following misbehaviour; if a written code of conduct is produced it may be helpful to include a statement that clarifies this.
- Include a copy of the code of conduct, or a statement of expectations with regard to behaviour, with the information about the visit issued to parents before their consent is requested. Remind parents of their responsibility to reinforce this with their child. (The standard County consent form requires parents to sign that they will do this). If a parents’ meeting is held prior to the visit, take the opportunity to re-emphasise this.

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- If sending home is considered as a sanction, ensure that parents are aware that they may be called upon to resume responsibility for their child part way through the visit. If parents are expected to collect their child from the venue, or pay the additional transport costs of sending home accompanied by a member of staff, then this should be stated as a condition of attendance in the information sent to parents before their consent is requested.

Revised September 2013

Signed off by Governors 9 September 2013