

3.0 Planning an Educational Visit

3.1 TYPES OF VISIT

The latest guidance from the DfES – Standards For Adventure 2002, (part 2) supplement states there are three categories of activities:

Category A (low risk)

These are activities that present no significant risks. They should be supervised by a teacher who has been assessed as competent by the LEA or Educational Visit Co-ordinator, where appropriate, to lead the activity. Examples include walking in parks or field studies in environments presenting no technical hazards.

Category B (medium risk)

These comprise some higher-risk or higher-profile activities. LEA approval is required for this category of activity. Safe supervision requires that the Group Leader should as a minimum, have undergone familiarisation specific to the activity and/or the location. The Group Leader will have to be approved as suitably competent by the LEA, and hold any necessary qualification/award. Examples include; walking in non-remote country, camping or cycling on roads.

Category C (high risk)

This is the most demanding category. It includes all those activities that if not school-led, would be in the scope of the Adventure Activities Licensing Regulations 1996. LEA approval is required for visits in this category. In the case of sports, where safe supervision requires the leader to complete some prior test of his/her specific competence, such testing might include a recognised course of training, the recorded accumulation of relevant experience or an assessment of competence by an appropriate body.

The range of visits offered to pupils and young people is further categorised by whether the visit is to be residential or abroad: -

- i) **Visit as part of a regular curricular activity within School hours with non-hazardous activities - Category A;** e.g. a visit to the local park or library.
- ii) **Visits not usually part of the school day that may extend beyond the end of the school day with non-hazardous activities – Category A;** e.g. a visit to Chester as part of a 'Romans' topic.
- iii) **Visits including an overnight stay – Category A/B;** e.g. a visit to a European Country as part of language studies.
- iv) **Visits of one day or less involving hazardous activities – Category B/C;** e.g. visit to do rock climbing or abseiling.
- v) **Visits including an overnight stay and involving hazardous activities – Category B/C;** e.g. staying in an outdoor activity centre and taking part in canoeing or other hazardous activities.

LEA approval is not required for visits in categories (i) and (ii), however schools should employ this policy and guidance document as a basis to develop their own guidelines of good practice for such visits.

LEA approval is required for all visits in categories (iii), (iv), and (v).

The LEA will undertake sample monitoring of all Educational Visits.

Hazardous Activities

The activities listed below require LEA approval. Please complete Form 1 and Form 2 and send to the Outdoor Education Officer at the LEA 28 days in advance.

The current list includes: -

- airborne activities
- archery
- camping
- canal boating
- canoeing
- caving/potholing
- climbing
- cycling/biking
- expeditioning
- fishing
- horse riding/pony trekking
- ice skating
- kite flying/kite surfing
- low and high ropes courses
- moorland, fell and mountain activities
- motor skills
- open country activities and field studies
- orienteering
- paintball
- rafting
- rowing and sculling
- sailing and power boating
- sea-level traversing and coasteering
- shooting
- skiing
- sub-aqua/snorkelling
- surfing
- swimming in open water (including non-commercial pools)
- water skiing
- skateboard parks
- theme parks

But this list is not exhaustive, new names and activities will appear!

3.2 NOTIFYING THE LEA

The requirement for the LEA approval of visits in categories (iii), (iv) and (v) applies to all establishments, including Schools, Youth Clubs or Youth Projects.

The requirement for the approval of visits extends to all visits abroad, whether they include a hazardous activity or not. If you are not sure whether you require LEA approval for a particular visit contact the Outdoor Education Officer at the LEA for advice.

Please note, where LEA approval is applicable, outline approval from the LEA should be obtained for an Educational Visit at the earliest opportunity, and in any case, before any visit arrangements are finalised and prior to offering the visit to pupils/parents.

The Local Education Authority should be notified using Form No.1.

3.3 EXPLORATORY VISITS

An Exploratory Visit should be made, where possible, by any person who is to lead a group abroad, on a residential visit or who is to instruct or lead the group in an outdoor activity such as trekking in a location that is not familiar to them. In other cases an Exploratory Visit should be undertaken to ensure that the venue is suitable, safe and meets the aims and objectives of the visit and can meet any other required needs.

Particular attention should be given to the potential for adverse weather conditions and the dangers presented by them, for example; flash floods, snow, frost, mud slides etc.

The Exploratory Visit should be used to assist in undertaking an assessment of the areas and levels of risk. Where an Exploratory Visit is not feasible the Group Leader should, as a minimum requirement, obtain specific information in writing from the proposed venue, other schools that have used the venue, local organisations, or Tourist Boards that will enable a suitable assessment of risk to be undertaken.

3.4 STAGES FOR PLANNING A VISIT

The stages outlined below can be used as a tick list for use when organising a visit. There is a more comprehensive Educational Visit Checklist.

Outline proposal to Head Teacher, Governing Body seeking approval in principal ✓

Proposals to include (Form No. 1 used as template):

- Visit's aims & objectives
- Likely date, duration, venue
- Pupil group & staffing arrangements
- Resources and estimated costs
- Outline approval of LEA for high-risk visits. If unsure of the category of your visit contact the Outdoor Educational Officer at the LEA for advice

Planning

- Contact the venue; ensure it is suitable for the visit (see section 11)
- Decide on transport details (see sections 8 , 11 & 13)
- Decide on Group Leader/Supervisors & adult volunteers (see section 4)
- Decide on funding and budget arrangements (see section 14)
- Undertake a risk assessment one generic risk assessment may cover several similar visits (see Section 6)
- Undertake an exploratory visit if required (see Section 3.3)

Substantive detailed proposal to Head Teacher, Governing Body (form No.1)

Provide full details of:

- Risk assessment and intended hazard control measures (see section 6)
- Emergency procedure and Home/School Contact (see section 15)
- Transport arrangements (see sections 8, 11 & 13)
- Insurance arrangements (see section 7)
- Costs (see section 14)
- Group membership (see section 4)
- Staffing details; relevant qualifications & experience (see sections 4 & 5).
- Contingency plans e.g. bad weather activities planned.

Low Risk (i) (ii) Approvals ✓

- Head Teacher/Governing Body
- Inform parents as necessary

Information to accompany visit

- Home/school contact information
- Checklist of those on visit

Visit ✓

- Brief pupils/those going on the visit
- Go on the visit monitoring risks at all times

Evaluate

- Evaluate visit

High Risk (iii), (iv), (v) Information Provision ✓

- Information pack for parents; to allow them to make an informed decision
- Parents briefing evening (meet the supervisors/Group Leader)

Approvals

- Head Teacher/Governing Body
- Parental consent for visit and for any activities that require additional consent e.g. swimming during the visit
- Final approval from the LEA

Visit Information

- All information required for the Visit Emergency Pack
- All information required to complete the Home-base/School Emergency Pack

4.0 Roles & Responsibilities

4.1 RESPONSIBILITIES OF THE LOCAL EDUCATION AUTHORITY

The Outdoor Educational Officer should be contacted in the first instance if advice is required on any aspect of Educational Visits. Should further advice be required you may be referred to the Liverpool City Council Safety Unit. The LEA with the assistance of the Safety Unit shall: -

- Monitor Educational Visits (their aims and objectives) carried out by schools and other relevant facilities including all visits that involve an overnight stay, trip abroad and/or hazardous activity.
- Monitor processes and procedures prior to Educational Visits; carry out 'spot checks' during visits with appropriate intervention when necessary. The outcome of such monitoring should be reported back to the relevant Governing Body or where necessary to all facilities involved with Educational Visits.
- Ensure all those involved with organising and undertaking an Educational Visit are aware of the importance and timing of undertaking head counts.
- Check the competencies and qualifications of any teacher who wishes to take charge of a hazardous activity.
- Maintain a register of staff who are competent and available to lead specific adventure activities.
- Be responsible for keeping relevant documentation and guidance up to date taking into account changes in the law and best practice.
- Ensure that suitable and sufficient risk assessments are completed, with particular attention to detail before any overnight stay, trip abroad or hazardous activity takes place.
- Periodically check the suitability of contractors used by schools for teaching hazardous activities. This will involve checks of risk assessments as well as qualifications of staff that teach the activities.
- A bulletin will be issued to all schools highlighting all new guidance and relevant information relating to health and safety and Educational Visits. This will pinpoint any action schools need to take.
- Appoint an Outdoor Education Officer, who will have suitable experience, competencies and qualifications to undertake the role.
- The Outdoor Education Officer and Safety Unit role will be reviewed regarding: -
 - Notification and approval of visits and monitoring of activities.
 - Maintenance of the Guidance for Educational Visits.
 - The issue of advice and instruction.
 - Dissemination of DfES and other national Guidance.
 - The link between health and safety and Educational Visits.
 - Training including continuous professional development.
 - The development of clear lines of communication at all levels of the LEA, the Safety Unit, Schools and other facilities.