

**Abertillery**  
Learning Community



## ALC EDUCATION VISITS POLICY

Policy:	Education Visits
Age Range:	3-16
Type:	Non-Statutory
Sub Committee:	Relationships & Wellbeing
Governing Body Approval:	25 <sup>th</sup> March 2026
Review Date:	March 2027
Staff Lead:	Deputy Headteacher

### Version Control

Version	Key Changes	Sub Committee Approval (Date)	Full GB Approval (Date)	Review Date
1.0	New Policy	30 <sup>th</sup> June 2025	9 <sup>th</sup> July 2025	9 <sup>th</sup> July 2026
2.0	EVC details; Evolve to be completed for visits requiring LA approval	4 <sup>th</sup> March 2026	25 <sup>th</sup> March 2026	March 2027

## Review

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### Monitoring, Evaluation and Review

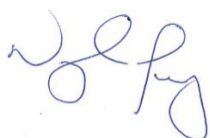
The Senior Leadership Team will annually review this policy and make any further recommendations to the Governing Body.

A subcommittee of the Governing Body will monitor the application of this policy and associated procedures in order to ensure its continued effectiveness and compliance.

Headteacher:



Chair of Governors:



Date: 25<sup>th</sup> March 2026

## **Summary of policy**

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Abertillery Learning Community follows the LA procedures for educational visit planning, approval and monitoring by using the EVOLVE online visit planning and approval system for all visits run by school staff or volunteers. Staff planning an educational visit must ensure that they plan their visit using the EVOLVE system and follow the procedures set out in this policy. This policy is reviewed (and updated as necessary) annually or following any accident / incident on an educational visit.

## **Planning and Approval Procedures for Educational Visits 2024-25**

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This document sets out Abertillery Learning Community's planning and approval procedures for Educational visits.

Anyone organising an off-site visit for young people from Abertillery Learning Community School should also refer as necessary to the National Guidance for Educational Visits endorsed by the Welsh Government. The Guidance can be viewed in the 'Guidance and resources/guidance' section of Evolve.

The Educational Visits Coordinator for the school is  
Johanna D'Amato – Deputy Headteacher (from effect 5<sup>th</sup> January 2026)

## Foreword

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

Learning out of the classroom is a strong theme that runs through all stages of education in Wales. Abertillery Learning Community has a well established and continuing commitment, to offering an exciting and enjoyable range of educational visits for our young people.

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

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

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

Staff who organise and engage in educational visits with children and young people show dedication, commitment and enthusiasm. Your work ensures that the young people of Abertillery Learning Community will continue to be given the opportunity to take part in such activities. I would like to take this opportunity to thank you for your professionalism and dedication. This policy and set of procedures are aimed at supporting you in this valuable work.

## Summary of procedures

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This document sets out the procedures by which Blaenau Gwent County Borough Council and its educational establishments meet the standards originally set out in the *All Wales Guidance* published by the Welsh Government in 2008 and more recently in the OEAP National Guidance advice.

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

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

### Other useful contact details.

Education	Emma Jones – 07969336066 Jo Watts – 07815005333
Health and Safety	Jim Thomas – 07966512415 Steve Martyn – 07966520584 Kathryn Franklin – 07976746937
Transport	Peter Butcher – 01495 355435

## Section A

### Visit Approval/Notification Procedures:

Flowchart 1 Visit approval/notification required for different types of visit:

[Flowchart 1](#)

Table 1: Definition of demanding environments

Table 2: Adventure activities

1. Approval and notification system for all visits
2. Blanket visit approval
3. Parent/consent form
4. Using an independent provider: pre-booking checks
5. Local Authority (LA) leader approval
6. LA approval for DofE award groups
7. LA approval decisions for visits
8. Record keeping
9. Monitoring
10. Review
11. Guidelines for staff

**Table 1. Definition of demanding environments.**

**Important note:** classification of locations is subjective. Visit leaders who are unsure of whether or not a location requires LA approval can seek clarification from their Educational Visits Coordinator (EVC). EVC's should also consult the Outdoor Education Adviser (David Evans) for technical advice.

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

**Table 2. Adventure activities**

**Important note:** This list is not exhaustive. If you are unsure whether or not an activity is classified as an adventure activity you should seek the advice of your Educational Visits Coordinators (EVC). These are listed at the front of the policy for each campus. You could also seek advice from David Evans who is the LA Outdoor Education Advisor

<b>Land Based Activities</b>	<b>Level of approval required</b>
Rock climbing/abseiling including climbing walls	LA approval required
Mountaineering	LA approval required
Hill walking	LA approval required
Ice climbing	LA approval required
Gorge or coastal scrambling/sea cliff traversing/coasteering	LA approval required
Underground exploration – cave or mine	LA approval required
Skiing (snow/dry slope) * <b>See note below regarding wearing helmets</b>	LA approval required
Air activities (except commercial flights)	LA approval required
Horse riding and pony trekking	LA approval required
High ropes courses	LA approval required
Quad biking/ATV's	LA approval required
Orienteering	LA approval required where activity takes place in a demanding environment
Mountain biking	LA approval required where activity takes place in a demanding environment
Trampoline parks	LA approval required.
<b>Water Based Activities</b>	<b>Level of approval required</b>
Kayaking, canoeing and stand up paddleboarding	LA approval required
Sailing and windsurfing	LA approval required
White water rafting	LA approval required
Waterskiing	LA approval required
Snorkel and aqualung diving	LA approval required
All forms of boating (excluding commercial transport)	LA approval required
Improvised rafting	LA approval required
Kite surfing	LA approval required
Surfing and bodyboarding	LA approval required
Dragon boating	LA approval required
Wave skiing	LA approval required
Jet skiing/personal watercraft	LA approval required
Any activity ( <b>including camping, fieldwork and non-adventure activities</b> ) taking place in demanding environments as defined in Table 2 above	LA approval required

\* *Snowsports Wales (and indeed all snowsport organisations in the UK) strongly supports the FIS (International Body) statement that “the use of helmets is recommended for all alpine skiers and snowboarders regardless of skiing ability and age”*

*The use of helmets for all snowsports activities organised by BG schools / establishments is mandatory for all those under the age of 18.*

## Processes for gaining approval

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### Approval and notification system for all visits

All visits must be approved by the Head of Campus or EVC and a record of the visit kept as set out in the 'Record keeping' section of this policy.

At Abertillery learning Community all visit leaders are required to use the EVOLVE system where LA approval is required. This system guides the visit leader through the visit planning and approval system required by the Local Authority (in line with WG guidance).

The EVOLVE system allows regular, repeated visits to be planned and approved.

One-off or occasional visits or visits that require LA approval or notification require EVC and Head of Campus approval for each visit (unless blanket LA approval has been given). Visit leaders should submit details of the trip via the EVOLVE system well in advance of the visit start date - see [Evolve Flow Chart 1](#). Please contact LA if you need access to the Evolve System.

### Blanket approval

Blanket approval may be given:

- by Head of Campus/EVCs for routine visits that do not require LA approval;
- by the LA for those staff who have gained LA leader approval (see below).

Even where blanket approval has been given it is recommended that all but the most local (walking) visits are recorded on Evolve - see [Evolve Flow Chart 1](#). For visits that have been given blanket approval, the visit leader and EVC must ensure that relevant information is left with the school/establishment emergency contact including details of the venue, activity, group, transport, start/finish times and other relevant information for each visit.

### Parent/carer consent

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

For non-routine visits (not listed on form 1) consent is obtained for each visit (or series of repeated visits) using form 2.

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

## Using an independent provider – pre-booking checks

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

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

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

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

Initial LA approval must be obtained before booking. Initial LA approval can be sought by completing and sending form OE1 (along with attachments listed on Form OE1) to the Outdoor Education Adviser at the address listed on Form OE1. Form OE1 can be downloaded from the EVOLVE system's Guidance and Resources/Forms section. Final LA approval for the expedition must be obtained at least 8 weeks before the expedition start date by completing and sending form OE2, along with attachments listed on Form OE2, to the Outdoor Education Adviser.

## Local Authority (LA) leader approval

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### Who needs LA leader approval?

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

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

- Either a) the relevant National Governing Body (NGB) leadership award for the terrain/activity (NGB leadership awards are set out in the National Guidance for Educational Visits [www.wales.gov.uk/healthandsafety](http://www.wales.gov.uk/healthandsafety) or b) have a written and signed statement of competence by an appropriate technical adviser verifying that the leader has the relevant technical and group management skills for the terrain/activity (see below for how to arrange technical adviser approval).
- Recent and relevant experience
- A current first aid certificate or qualification
- Support of the Head

To arrange technical adviser approval the EVC must identify an appropriate technical adviser who is willing to make a signed statement of competence for the visit leader. Technical adviser approval is normally given only if the following conditions are met:

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

Appropriate levels of technical adviser for different activities and levels of activity are given in the National Guidance for Educational Visits. If the intended activity is not listed, the Outdoor Education Adviser may be able to advise on the appropriate level of technical adviser.

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

- the activity/activities at specific, named venue(s) at any time for the duration of the approval period;

or:

- the activity/activities at all venues that are within the remit of their competence at any time for the duration of the approval period.

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

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

Following approval by the Head/EVC, LA approval must be obtained.

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

## **LA approval decisions for visits**

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

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

## **Record keeping**

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

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

In addition, ALC should retain and archive the following:

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

This information should be kept for 5 years after which it may be destroyed.

## Monitoring

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### Internal monitoring by the Head of Campus/EVC

The Head of Campus/EVC must monitor, from time to time, for compliance with LA guidance by visit leaders within the school/centre.

Monitoring by the Head/EVC should include:

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

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

## Review

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

## Guidelines for Staff

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Under the **Health and Safety at Work Act 1974** employers are responsible for the health, safety and welfare at work of their employees. Employers are also under a duty to ensure, as far as is reasonably practicable, the health and safety of anyone else who may be affected by their activities. This includes participants in educational visits. It is essential that any member of staff planning an educational visit reads the "All Wales Guidance" and the Educational Visits Policy. These documents contain all the information required to run a safe and enjoyable educational visit.

This section contains information on:-

1. Roles and responsibilities.
2. Protocol for planning an educational visit.
3. Protocol to abide by during an educational visit.
4. What to do after the educational visit.

## **Roles and Responsibilities of the Visit leader.**

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The visit leader has delegated responsibility for the supervision and conduct of the visit. The visit leader must:

- Ensure that the planned visit and activities are suitable for the group;
- Obtain the Head of Campus / EVC's written approval for the visit according to school policy;
- Ensure that all accompanying adults, whether employees or volunteers are given responsibility within their level of competence and have been briefed on the purpose of the visit and their roles and responsibilities;
- Ensure that all staff are aware of and fulfil their 'duty of care' at all points during the visit;
- Be able to control and lead young people of the relevant age range in the proposed activity;
- Obtain LA leader approval if leading any visit for which LA approval is required as detailed in previous section of the policy;
- Be aware of child protection issues and introduce measures to protect children as required;
- Ensure that appropriate first aid cover will be available;
- Undertake and complete the planning and preparation of the visit, using EVOLVE, including the briefing of group members and parents/carers;
- Identify significant hazards and safety measures to reduce risk to an acceptable level, and to make known to parents/carers, the Head of Campus / EVC the level of residual risk that needs to be managed;
- Review regularly undertaken visits and advise the Head of Campus / EVC where adjustments may be necessary;
- Have enough information about the young people to assess their suitability for the visit or be satisfied that their suitability has been assessed and confirmed;
- Ensure the ratio of staff to young people is appropriate for the environment / activities and the needs of the group;
- Carry out dynamic risk management while the visit takes place and consider stopping the visit if the risk to the health or safety of the young people is unacceptable and have in place procedures / alternative plans for such an eventuality;
- Arrange for clearly understood delegation in his/her absence;
- Make appropriate and adequate preparations for emergencies in conjunction with the EVC and ensure that all accompanying leaders are familiar with these procedures;
- Ensure that group leaders and other instructors have details of young person special educational or medical needs which will be necessary for them to carry out their tasks effectively;
- Carry out an evaluation of the visit on return to base to inform future visits using EVOLVE.

## **Planning the Visit**

The Visit leader should consider the following:-

- The educational aims of the visit; Aims and objectives of the visit should be clearly identified at an early stage. These should be relevant to young people and their development, taking account of age, ability, competence, previous experience and resources available.
- Visit leaders should seek local knowledge of facilities that could contribute to the success of the visit as well as potential difficulties and hazards.
- An exploratory visit is considered highly desirable on both educational and safety grounds for all visits. This will give the leader greater confidence in his/her ability to supervise the young people.
- If an exploratory visit is not possible the visit leader will need to complete an adequate assessment of the benefits and suitability of the venue and of the risks associated with it.

### **The programme and itinerary to support these aims:**

A detailed programme / itinerary should be established with appropriate supervision at all times. All supervisory staff and young people should be aware of the intended programme, including the possibility that the planned activities may need to be changed if conditions require it. Visit leaders must ensure access to first aid cover at an appropriate level. If operating away from a site, first aid kits should be carried.

### **The dangers and difficulties that may arise and measures needed to reduce these:**

A specific risk assessment should be completed by the visit leader. A general risk assessment is available from the EVC but should be added to depending on the nature of the activities to be undertaken. If an Independent provider is being used then they should fill in a questionnaire, form 5, prior to the visit to agree what elements of the visit they are responsible for. Visit leaders should think about contingency planning that might allow the educational aims of the visit to be achieved even if the original plan has to be abandoned.

**Staffing** It is important to have an adequate ratio of competent adult supervisors to young people for any visit. The factors to take into consideration include:

- sex, age and ability of group;
- young people with special educational or medical needs;
- nature of activities;
- experience of adults in off-site supervision;
- duration and nature of the journey;
- type of any accommodation; • competence of staff, both general and on specific activities;
- requirements of the organisation/location to be visited;
- competence and behaviour of young people;
- first aid cover.

The staff to young person ratio ranges given here are intended only as a starting point for visit leaders when planning their visit. They are not intended for professional outdoor activity providers. Actual ratios for any visit must be determined through a process of risk assessment by the visit leader or other competent staff. The Head of Campus/EVC should inquire if numbers fall significantly outside these ranges.

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

## Travel

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

Mode of Transport	Driver	Regulations / Guidance
Hired Coach	Coach Company	<p>Visit Leaders must ensure that a reputable coach company is used and additional checks may need to be carried out to verify this</p> <p>If any member of the group uses a Wheelchair, the Visit Leader should ensure the company can provide a vehicle appropriate which has access and securing facilities.</p> <ul style="list-style-type: none"> <li>● <i>NB All coaches first registered after 1st October 2001 must be fitted with seat belts and since September 2006 it is a requirement that all passengers must wear the seat belt if one is fitted. If the vehicle is older there is no legal requirement for it to have seat belts and therefore no legal requirement to wear them.</i></li> </ul>
Hired Mini-Bus – Self Drive  School Mini-Bus	Teacher	<p>The Visit Leader should check that the driver has a valid driving licence (see section headed ‘MiniBus licence Requirements’ below) and that the insurance is appropriate for the journey. Taking Mini Buses abroad will require a full PCV licence and additional insurance. A forward facing seat with a seat belt must be provided for each child travelling.</p> <p>Regular maintenance checks must be carried out and a detailed record kept.</p>
Private Vehicle – Car	Teacher  Parent	<p>A valid driving licence, Insurance Certificate (including business cover for school staff) and MOT must be submitted to the school for approval. It is the legal responsibility of the driver to ensure their passengers safety.</p>
Private Vehicle – Taxi	Taxi Driver	<p>Visit Leader should only use approved / registered licensed Taxi companies and should check that the company used has the appropriate Insurance.</p>

## Minibus Driver – Licence requirements

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

Licence gained before January 1 <sup>st</sup> 1997	Staff may drive a minibus without a D1 passenger carrying vehicle (PCV). <i>It is good practice for drivers to be trained in a non-PCV course to ensure they meet the standard of driving competency expected by the LEA</i>
Licence gained after January 1 <sup>st</sup> 1997	Only if <b>all</b> of the following are met then a PCV licence is not required. The Driver must: - be 21 years old or over; - have held a driving licence for at least two years; - be trained in a non-PCV course - not attach a trailer - not drive outside the uk - be driving in a voluntary capacity (ie they receive no payment and it does not form part of their job description) - ensure that the vehicle does not exceed the maximum weight (3.5 tonnes) - only use the mini bus for educational purposes  <b>If one or more of the above are not met the Driver must hold a full D1 PCV licence</b>

## Information to parents/carers

An effective, two-way communication process between Abertillery Learning Community and parents/guardians is important for all visits. Effective communication will ensure that parents/carers are made aware of the purpose and nature of the visit and will ensure that parents/carers inform the school/centre about any particular needs and issues of their child relevant to the visit.

Information to parents might include:

- the aims and benefits of the visit;
- dates of the visit or series of visits;
- times of departure and return – and whether parents/carers will be required to meet their children on return;
- the location where the young people will be collected and returned;
- mode(s) of travel including the name of any travel company;
- the size of the group and the level of supervision;
- details of accommodation;
- details of provision for special educational or medical needs;

- names of leader, of other staff and of other accompanying adults;
- the planned programme of activities;
- agreed arrangements for non-emergency contact during the visit;
- emergency contact arrangements to and by parents/carers;
- the code of conduct for the expected standards of behaviour and sanctions;
- arrangements for early return of a young person for any reason during the visit;
- details of insurance taken out for the group as a whole in respect of luggage, accident, cancellation, medical cover, any exceptions in the policy and whether parents need to arrange clothing and equipment to be taken;
- what young people should not take on the visit or bring back;
- advice on pocket money and allocation/care on journey;
- the information to be given by parents and what they will be asked to consent to;
- details on the cost of the visit.
- the risks associated with the visit (but tempered with information about the school's/centre's good safety record, and the overall benefits to the participants).
- additional cover;

#### **Information should (where relevant):**

- be sent as far in advance of the visit as practicable;
- be followed up by a parent's/carer's meeting to clarify detail if needed. This is particularly important for residential visits, or when the young people are to travel abroad or engage in adventure activities or visits to demanding environments. Where a briefing meeting is required, alternative arrangements might need to be made for parents/carers who cannot attend or who have difficulty with communication.

Parent/carer consent must be obtained for educational visits. This may be done on a blanket basis for regular visits or on a one-off basis for non-regular visits. The contents of a consent form for a parent/carer to sign will vary according to the type of visit. Example forms are available from in this document.

If parents/carers withhold their consent absolutely the young person must not be taken on the visit but the curricular aims of the visit should be delivered to the young person in some other way wherever possible. If the parents/carers give a conditional consent the Head will need to consider whether the young person may be taken on the visit or not. For visits that require parent/carer consent, parents/carers should be asked to agree to the young person receiving emergency treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities. If parents/carers do not agree to this, Heads may decide to withdraw the child from the visit - given the additional responsibility this would entail for the visit leader.

Doctors can be expected to carry out necessary emergency treatment without parental consent but it is possible that a surgeon in another country might be reluctant to operate on a young person unless assured that the visit leader had parental authorisation to agree to such treatment. It is sensible to include a translation of the medical consent, as signed by the parent, in the relevant foreign language.

If it is going to be possible for parents/carers to contact their child via the school contact or the visit leader in the event of a home emergency or a late arrival home, these details should be made known to parents/carers.

Parents/carers should therefore:

- know the destination details;
- be aware of the emergency contact arrangements.

## Planning forms

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Form 1: Parent/carer consent form: routine visits

Form 2: Parent/carer consent form: non-routine visits

Form 3: Risk Assessment

Form 4: Visit planning check sheet

Form 5: Independent provider questionnaire

Form 6: Checklist for young people attending the visit

Form 7: Summary of information on young people/adults attending the visit

Form 8: Exchange visits

Form 9: Visit leader emergency action plan

Form 10: Base emergency contact form

Form 11: Incident record

Form 12: Example risk management procedures



## Parent/carer consent Routine off-site visits

School: **Abertillery Learning Community**

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

I hereby agree to my child participating in routine visits off the school/establishment site. These visits might include the following, or similar, activities: sports, curriculum related visits, inter school events, conferences, debates, reward trips etc.

These visits will normally take place at the following, or similar, locations: sports facilities, other schools, museums, galleries, cinemas, theatres, theme parks and other curriculum related venues. **Each venue is subject to risk assessment prior to each visit.**

### I understand that:

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

Full name of parent/carer: \_\_\_\_\_

Signature of parent/carer: \_\_\_\_\_ Date: \_\_\_\_\_

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

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

**Form 2**

**Parent/carer consent for non-routine visits**

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

School/centre:

---

Visit/activity:

---

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

Your child's name \_\_\_\_\_ Form/Class (if relevant) \_\_\_\_\_

**Medical and dietary**

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

YES/NO

If YES, please give details:

---

---

b) Please give details of any allergies:

---

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

---

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

---

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

---

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

YES/NO

If YES, please give details:

---

---

h) When did your son/daughter last have a tetanus injection? \_\_\_\_\_

### **Water confidence/swimming ability**

Please indicate your child's swimming ability:

Cannot swim

Able to swim a little in a swimming pool

Able to swim confidently in a swimming pool

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

### **Your contact details**

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

Home

address \_\_\_\_\_

### **Alternative emergency contact**

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

Address:

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### **Family doctor**

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

Address:

---

### **Declaration**

Having read the information about the visit, and having understood the level of supervision to be provided, I agree with my child taking part in the visit and activities described.

I understand that all reasonable care will be taken of my child during the visit/activity and that he/she will be under an obligation to obey all directions and instructions given and observe all rules and regulations governing the visit/activity.

I understand the code of conduct for the visit and the sanctions that may be used if my child breaks this code of conduct. I have discussed the code of conduct and sanctions with my child. **(This relates to school behaviour policy.)**

I understand that if my child seriously misbehaves or is a cause of danger to him/herself or to others, then I may be asked to collect him/her or he/she may be brought home early from the visit/activity. In such a situation there will be no obligation on the school/centre to refund any money.

In an emergency I agree to my son/daughter receiving medication and any emergency dental, medical

or surgical treatment, including anaesthetic or blood transfusion, as considered necessary by the medical authorities present.

I understand the extent and limitations of the insurance cover provided.

**FULL NAME OF PARENT OR CARER** (print please):

\_\_\_\_\_

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

**Form 3**

<b>Risk management form</b>
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Type of visit:

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

Additional notes

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

## Form 4

### Visit planning checklist

This checklist is intended for use as an aide-memoire for the main elements of visit organisation as set out in the *All Wales guidance for Educational Visits*. Schools/centres are encouraged to modify this list to suit their needs.

#### Purpose of visit

- What are the aims of the visit?

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

- Are venues, activities and time of year appropriate to the aims and age/ability of the group?
- have you planned alternative activities (plan B) in case you need to abandon your planned programme for any reason?
- Does the visit involve the use of an independent provider?
- If yes, has this provider satisfactorily completed and returned the Independent Provider Questionnaire before you make any booking?

#### Have you gained approval from your EVC/Head/Governors (and LA if required) prior to making any financial commitment?

#### Risk management

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

#### Overseas visits

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

#### Does your visit involve:

- Adventure activities?
- Visits to demanding environments?

#### If so, have you gained LA approval at least 28 days before the visit?

#### Staffing

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

### **Finance**

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

### **Insurance**

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

### **Parent/carer information and consent**

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

### **Special Needs**

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

### **Programme**

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

### **Clothing and Equipment**

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

### **Medical arrangements**

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

### **Accommodation**

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

### **Transport**

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

### **Visits Overseas**

- Passports?
- Visas?
- Health/medical arrangements in place? (European Health Insurance Cards /UK Global Health Insurance card
- Minibus Regulations (Tachographs) License Requirements (PCV License)
- Exchange visits: child protection procedures?
- Cultural issues?

### **Emergency procedures, contacts and communication**

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

### **Mobile phones**

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

### **Post-visit arrangements**

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

## Form 5

### Independent provider questionnaire

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

#### **Notes for independent providers and venues:**

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

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

Name of Provider / venue

Address

Tel.

Email

Website

Name of person completing this form

Signed

Position in organisation

Date

1. Does the above Provider have any official recognition or accreditation?

If **yes**, please give details here:

2. Do you have written risk assessments for all of the premises/services/activities that you provide?

If **yes**, are these risk assessments available to view if required?

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

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

If yes, how do you inform them of this?

3. Do all of your facilities comply with relevant statutory requirements?

4. Do you provide first aid equipment at the venue/activities?

- Will a trained first-aider be present while the group is visiting?

5. Can you provide, if required, contact details for similar groups who have recently used your services?

6. Do you provide opportunities for preliminary visits?

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

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

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

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

9.

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

10. Do you have a procedure for dealing with complaints?

11. Residential establishments only

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

12. Provider-led activities only

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

Primary schools	<input type="checkbox"/>	Secondary schools	<input type="checkbox"/>	Youth Groups	<input type="checkbox"/>	Special schools	<input type="checkbox"/>
Young people with challenging behaviour	<input type="checkbox"/>	Sixth form and FE college students	<input type="checkbox"/>				

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

13. Adventure activity providers only

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

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

- Do you provide any non-licensable adventure activities?

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

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

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

**Form 6**

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

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

**Form 7**

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

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

**Form 8**

**Exchange visits - host family contact details**

Name of young person	Host family name	Address/contact details

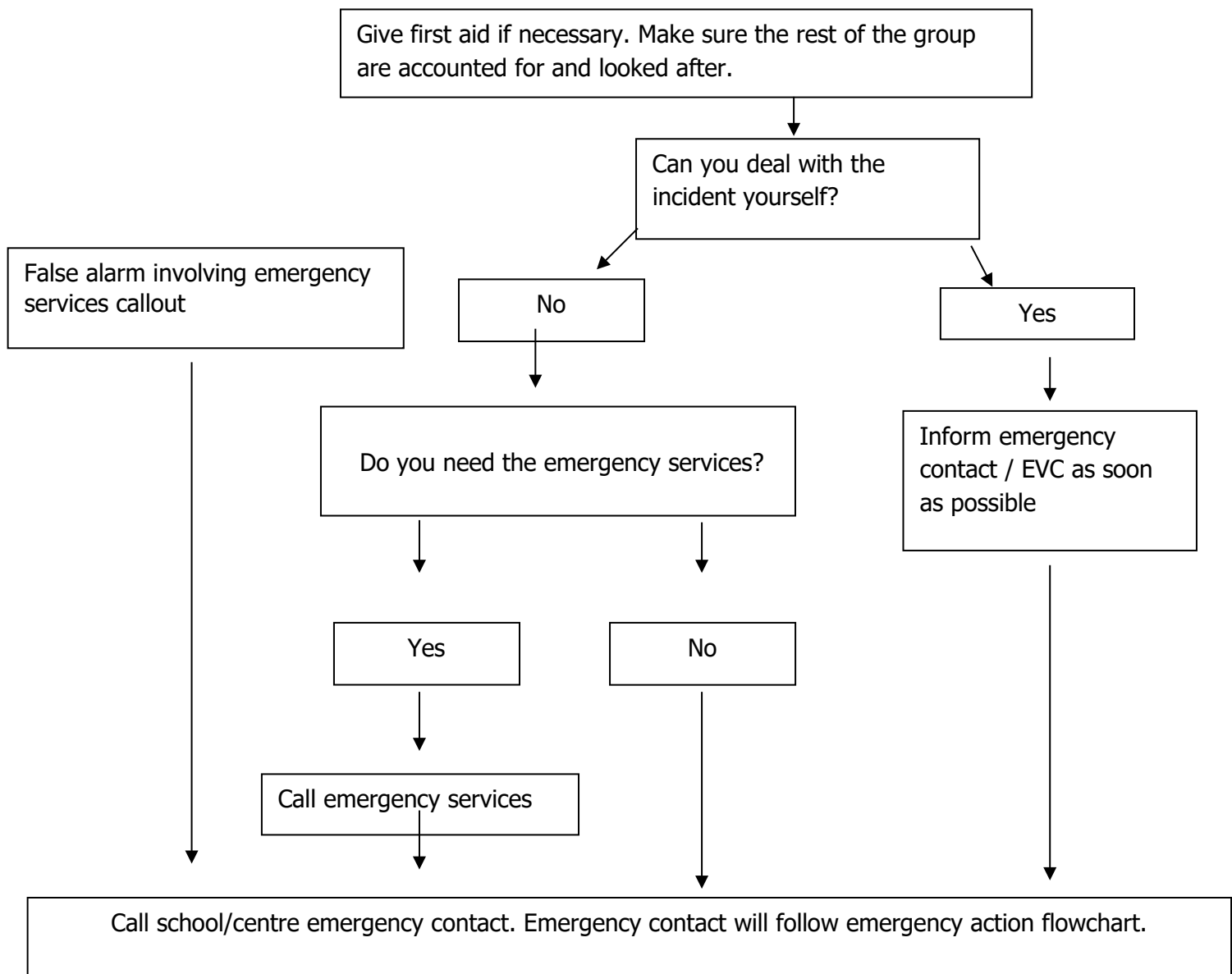
**Form 9**

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

**Do not speak to the media –**

**direct all enquiries to LA corporate public relations team  
via the Contact Centre - Phone: 01495 311556**

**Or – 01495 311556 Out of Hours or in any Emergency Situation  
- not for general use (24hrs)**



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

Record information on 'Incident Record Form'.

**Do not speak to the media**

**direct all enquiries to LA press officer via contact centre – 01495 311556**

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

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

**YES**

**NO**

Log telephone calls and timings and keep phone manned until incident is resolved.

Can the school/centre handle this internally?

**NO**

**YES**

Call for external assistance from emergency services if not already called.

Arrange assistance as required by staff at incident e.g. transport / evacuation.

Inform LA

Complete incident/accident report form (and send to LA if required).

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

Head / EVC to assess incident, recommend action and implement accordingly.

Inform staff and LA Outdoor Education Adviser of recommended action.

**Form 11**

**Incident record form**

NB This form should be completed by an emergency contact handling an emergency call. The EVC should ensure that LA incident reporting procedures are followed as soon as possible after the incident.

**ABOUT THE INCIDENT**

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

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

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

Activity taking place (if applicable) \_\_\_\_\_

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

Contact number for visit leader \_\_\_\_\_

Name(s) of key witness(es) \_\_\_\_\_

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

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

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

\_\_\_\_\_  
\_\_\_\_\_

Signed (Head or EVC) \_\_\_\_\_ Date \_\_\_\_\_

Reviewed by LA Officer \_\_\_\_\_ (Position) Date \_\_\_\_\_

**Form 12**

**Example Standard risk management procedures**

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

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

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

Stranger danger	Pupils	Ensure children are made aware not to walk off with an unknown adult unless given specific instruction by visit leader. Regular head counts Supervised at all times, including appropriate supervision when toileting
Beach/coastal visits - washed into sea caught by rising tide	Staff and pupils	Check tide times before embarking on trip Check weather forecast for day of visit Brief pupils and staff not to go near waters edge
Accident/emergency	Staff pupils	Follow emergency procedure guidelines carried by visit leader Ensure suitable staff helper (in addition to visit leader) understands emergency procedure Brief children of what to do in an emergency and how to summon help
Getting lost/separated from group (outdoor venues)	Staff	Regular headcounts Ensure pupils are to stay in small groups Ensure staff accompany pupils at all times Brief pupils to stay put if lost or separated and to shout for attention Ensure all pupils know name of visit leader, staff and school/establishment name
Getting lost/separated from group (indoor venues)	Staff	Regular headcounts Ensure pupils are to stay in small groups Ensure staff accompany pupils at all times Brief pupils to stay at venue if lost or separated never to leave the premises Brief children to make their way to reception Ensure all pupils know name of visit leader, staff and school/establishment name
Medical Conditions	Pupils	Ensure medical conditions are disclosed prior to visit Ensure consent is given for staff member to administer medicine if required Ensure medicines, epi pens, inhalers, etc are carried by visit leader Ensure at least one staff member/adult volunteer knows how to administer medicine if required.
Walking up/down Vardre/Orme	pupils	Brief pupils and helpers of proposed route Brief pupils of appropriate behaviour Ensure member of staff at front, middle and rear of pupils Ensure correct clothing and footwear is used

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

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

Risk assessment devised by.....

Implementation date:

Review date: