

# Section A

## WREXHAM BOROUGH COUNTY COUNCIL

### Planning and approval procedures for Educational Visits

This document sets out the Wrexham Borough County Council planning and approval procedures for Educational visits. The document has been divided into 5 key sections. Customise the yellow highlighted sections to reflect what goes on in your school/establishment. You may add to other sections of the policy to reflect additional requirements for visit planning within your school/establishment but you **MUST NOT delete any content from Section A.**

Section A – Policy and Guidance

Section B – Planning and approval procedures

Section C- Risk Management

Section D – Emergency Procedures

Section E - Forms

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

#### Revision history

Issue Date	2016-2017
Author	Arwel Elias, Mike Rosser
Date approved by Director of Education	
Date approved by Board of Governors	
Summary of Changes	
This policy will be reviewed in :	July 2018
The review will be undertaken by:	Arwel Elias, Mike Rosser

This document is available in Welsh

# **St Anne's Catholic Primary School**

## **Educational visits policy**

### **2017-2018**

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##### **Summary of policy for educational visits**

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#### **Summary of policy**

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

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

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

This policy is reviewed annually or following any accident / incident on an educational visit.

## **Foreword**

**Please insert statement by Head/Chair of Governors in support of off site visits**

e.g.

- Importance of educational visits
- Recognition of role that school/establishment staff play

## **Foreword**

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

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

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

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

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

**Ian Roberts**

**Head of Education**

**Date: August 2017**

## 2. Roles and Responsibilities

### Visit Leader

The designated person responsible for the Visit and who will have overall responsibility for the safety and conduct of participants and the Visit Leadership Team. Visit Leaders will need to obtain the Head/EVC's approval for the visit according to school/centre policy;

They will need to obtain LA leader approval if leading any adventurous/ demanding environments visit for which LA approval is required (Please see section on LA Approval)

### Key Requirements

- Must be competent to lead, confident and accountable, not that they hold a particular post, title or job description.
- Visit leader should have the ability to lead to the level demanded by the visit, and has sufficient relevant experience and knowledge of the activities, the group, and the environments they will operate in.
- Undertake and complete the planning and preparation of the visit, including the briefing of group members and parents/carers;
- Ensure the ratio of staff to young people is appropriate for the environment/activities and the needs of the group;
- Identify significant hazards and safety measures to reduce risk to a tolerable level, and make known to parents, EVC and Head and others the level of residual risk that needs to be managed;
- 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 that all accompanying leaders are familiar with these procedures;
- Make appropriate and adequate preparations for emergencies in conjunction with the EVC
- 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

### Educational Visit Coordinator

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

- **who is part of, or able to influence, the Senior Management Team;**
- **with sufficient authority to make a judgement call about the competence of any other staff member to lead an off-site visit and to approve or decline visits planned by any staff member;**

The EVC is the routine contact for dialogue with the LA Outdoor Education/Educational Visits Adviser.

### Key Requirements of the EVC:

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

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

## Head

Heads/Managers should have an establishment visits policy and procedures that conform to and follow the requirements and recommendations of their employer's guidance and ensure that arrangements are in place for the educational objectives of all visit to be inclusive. They will need to ensure that arrangements are in place for the governing body to be made aware of certain visits and ensure that visit arrangements and outcomes are evaluated to inform future visits and staff training needs;

### Key Requirements of the Head

- Be aware that the appointment of an Educational Visits Coordinator (EVC) is critical to the implementation of this guidance and should be allowed sufficient time to fulfil the role, including attendance at OEAP-approved training. Heads/Managers may choose to designate themselves as EVC.
- Approve visit for **all** educational visit prior to visit date as set out in the table below
- Ensure that proper and effective support structures in the event of emergency or critical incident including means of contacting the relevant officers LA Education Officer (Schools) or Principal Youth Officer (Youth Service) or emergency planning team and arrange for the reporting of accidents and incidents as required. Records of these should be reviewed regularly, and this information used to inform future visits
- Where needed, have access to expert advice from their Education Visit adviser.

## Board of Governors

Members of the Governing Body should view their main role as being 'to enable and ensure' that staff are fully aware of the employer's responsibilities under Health and Safety Law and that the establishment have formally adopted the Education Visit Policy and that they have a robust system to support the implementation of the policy.

### Key Requirements

- They challenge in order to be clear about of how outdoor learning and visits lead to a wide range of outcomes for children and young people and contribute towards establishment effectiveness.
- They ensure that the Education Visit policy and procedures are fully implemented (including emergency procedures – and it supports the principles of inclusion)
- The involvement in Board/Governing Body in the visit approval process is clear and approval and notification procedures operate effectively
- Ensure there is a trained EVC who meets the employer's requirements, with a sufficient time allowance to fulfil the role and training to support the planning and delivery of visits and outdoor learning.
- There are monitoring procedures in place, activity is evaluated, good practice is shared and any issues are followed up to comply with statutory and employer's requirements.

## Education Visit Advisor

The Educational Visits Advisory Service fulfils the following statutory Council functions to supports the LA to meet its legal responsibilities and powers with regard to off-site and educational visits delivered to young people by its employees. We provide expert advice on safety and quality of educational visits and on risk management in the context of all educational visits, and on behalf of the Local Authority approve (or disallow) visits for which LA approval is required these including adventure activities, expeditions and overseas visits. We monitors standards of Health and Safety management in off-site activity and educational visits, including observing activities and visits and ensure that adequate and appropriate training is available and taken up by relevant employees.

## **Key Requirement**

- Ensure that EVCs, visit leaders, other school/centre staff and other adults involved in educational visits are assessed as competent in their specific tasks.
- Ensure that adequate and appropriate training is available and taken up by relevant employees;
- Ensures that LA guidance on Health and Safety of pupils on educational visits is provided to all LA educational establishments and is kept up to date with current best practice, including lessons learned from incidents in Wales and beyond.
- Determines which visits will require LA approval and which may be approved by the educational establishment and fulfils the LA's approval role for specified categories of educational visits.
- Verifies the competence of LA employees who wish to lead visits in any of the areas or activities for which LA approval is required
- Offers relevant training, advice and support to all educational establishments on the Health and Safety of pupils on educational visits and other matters relating to safety and quality in Outdoor Education.

## **Contact Details for Local Authority**

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

#### **Mike Rosser**

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

### **Accidents, incidents and general advice relating to Health and Safety**

**Wrexham CBC Health and Safety Officer**/Health, Safety and Welfare Advisor (Economy, Community and Education)

Nigel Lawrence  
E-mail: [nigel.lawrence@wrexham.gov.uk](mailto:nigel.lawrence@wrexham.gov.uk)

Phone: 01978 315565

## 1. Approval and notification requirements for visits

All visits must be approved as set out in the table below. LA approval decision for visits will be given via the Evolve system. Visits that require LA Approval **MUST NOT PROCEED UNTIL** this approval has been given. All relevant forms can be found on Evolve in the resources section

Visit type	Planning and approval required
<b>Routine visits</b> (as defined on form 1 of this policy)	<b>Planning</b> Visit planned on form 2 (routine visit planning form) <b>Approval</b> By the Head <b>before the visit takes place</b> (Heads may give blanket approval for a member of staff to lead routine visits)
<ul style="list-style-type: none"> <li>• <b>Non-routine visits</b></li> <li>• <b>Overnight visits</b></li> </ul>	<b>Planning</b> Visit planned using the EVOLVE system <a href="http://www.wrexhamvisits.org">www.wrexhamvisits.org</a> <b>Approval</b> By the Head on the EVOLVE system <b>before the visit takes place.</b> <b>Visits that have not been approved by the Head on the Evolve system MUST NOT TAKE PLACE.</b>
A visit involving any of the following elements: <ul style="list-style-type: none"> <li>• <b>Demanding environments</b> (as defined in Table 3 below)</li> <li>• <b>Adventure activities</b> (as defined in table 4 below)</li> </ul>	<b>Planning</b> Visit planned using the EVOLVE system <a href="http://www.wrexhamvisits.org">www.wrexhamvisits.org</a> <b>Approval</b> Approved by the Head on the EVOLVE system <b>at least 28-14 days before visit start date.</b> LA approval required – Evolve automatically applies for this after the Head approves the visit using their PIN number. <b>Visits that have not been approved by the LA on the Evolve system MUST NOT TAKE PLACE.</b>
<b>Overseas expedition</b> organised through an independent provider ( <i>i.e. expedition to a developing country involving trekking or other adventure activities</i> )	<b>Planning</b> Visit planned using the EVOLVE system <a href="http://www.wrexhamvisits.org">www.wrexhamvisits.org</a> LA Approval is in two stages: <ul style="list-style-type: none"> <li>○ Initial approval before booking using form OE1 (available on Evolve by clicking on 'guidance and resources' and then 'forms')</li> <li>○ Final approval on the Evolve system at least 8 weeks before the visit</li> </ul> <b>Visits that have not been approved by the LA on the Evolve system MUST NOT TAKE PLACE.</b>
<b>Duke of Edinburgh Award expedition</b>	<b>Planning</b> Visit planned using the EVOLVE system <a href="http://www.wrexhamvisits.org">www.wrexhamvisits.org</a> <b>Approval</b> Approved by the Head on the EVOLVE system <b>at least 28-14 days before visit start date.</b> LA approval required – Evolve automatically applies for this after the Head approves the visit using their PIN number. <b>Visits that have not been approved by the LA on the Evolve system MUST NOT TAKE PLACE.</b>

## **2. Summary of Procedures**

### **Parent / carer consent**

Informed parent/carer consent must be obtained for all visits. For routine visits eg swimming, gymnastics and walk within the local community blanket consent is obtained.

For non-routine visits i.e. Overnight/adventurous etc. consent is obtained for each visit (or series of repeated visits) using a Non-routine Visit Parental Consent Form or Adventure Activities Consent form. An example of a non-routine visit parental consent form can be obtained from the Evolve system by clicking on resources and then 'forms'.

If parents/careers withhold their consent the young person must not be taken on the visit but the curricular aims of the visit should be delivered to the young person in some other way wherever possible. If the parents/careers 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, theme parks, and public access (lifeguarded) swimming pools or similar.

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

If the provider has the LOtC quality badge (Learning Outside the Classroom Quality Badge accreditation) The Quality Badge providers have pledged to engage in an ongoing process to sustain high-quality learning outside the classroom and who have demonstrated that they meet six quality indicators

1. has a process in place to assist users to plan the learning experience effectively;
2. provides accurate information about its offer;
3. provides activities, experience or resources which meet learner needs;
4. reviews the experience and acts on feedback;
5. meets the needs of the users;
6. has safety management processes in place to manage risk effectively.

### **LOtC badge holders do not need to complete the Independent Provider Questionnaire**

Providers who are not LOtC holders will need to complete the independent providers' questionnaire (which can be downloaded from the EVOLVE system's Resources/Forms section [www.wrexhamvisits.org](http://www.wrexhamvisits.org) 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.



## Local Authority (LA) leader approval

### Who needs LA leader approval?

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

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

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

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

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

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

- the activity/activities at specific, named venue(s) at any time for the duration of the approval period;
- or:
- the activity/activities at all venues that are within the remit of their competence at any time for the duration of the approval period.

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

### DofE Award groups

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

LA DofE Award Officer [craig.mathews@wrexham.gov.uk](mailto:craig.mathews@wrexham.gov.uk)

The **Expedition Supervisor** is responsible for ensuring that risks are managed appropriately during the expedition (and any training sessions carried out in preparation for the expedition. Supervisors who currently do not hold a formal leadership award **must** obtain the relevant leadership award (or Technical Advisor statement of competence) for the terrain in which they wish to supervise. Please refer to guidance document on Evolve for further details

<https://evolve.edufocus.co.uk/publicdocs?fileid=59&domain=conwyvisits.org>

## **Joint visits or collaborative visits planned with or by another establishment or organisation**

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

Examples include:

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

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

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

## **Guidance of the Management of cross county collaborative visits i.e. Ski courses**

The following guidance ensure that best current practice is followed on cross county collaborative visit

### **Payments:**

- All payments must be made via school payments system by setting up a holding account code for the trip.
- Monies can then be paid into this by the individual schools
- Payments to any provider can be made from this account
- If there is an administration charge to the participating schools this should be agreed and transparent

### **Trip Management**

1. Participating schools and parents must be made aware of the collaborative nature of the trip and the payments pathway and the booking process
2. Any provider must be made aware of the collaborative nature of the trip and issue insurance/guidance etc on a school by school basis. This can be done via organising school
3. Each school must send the appropriate number of staff to enable them to supervise their pupils

4. Staff from participating schools school meet prior to the trip leaving and agree the content of a joint risk assessment for supervision of pupils. (Template for this Risk assessment can be found in section C)
5. Parents must be made aware of the number of schools that are going and that their children may be supervised by staff other than those from their school
6. Pparticipating schools can complete a collaborative visit form on Evolve form for the trip and gain the normal LA permission for an Adventurous/Overseas trip. **Please contact your advisor for further guidance**
7. The Education Visit Advisors or each County must be informed of all participating schools early in the booking process so as to have an overall picture when approving individual schools

## Blanket approval

Blanket approval may be given:

- by Heads for staff to run routine visits
- by the LA for those staff who have gained LA leader approval (see 6 below)

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

## Educational Visit and the threat of terrorist attacks

A heightened state of vigilance continues to be required for all educational visits. We advise to exercise caution in public places and parental concerns should be respected. For up to date guidance please visit EVOLVE system's and the Guidance section ([www.wrexhamvisits.org](http://www.wrexhamvisits.org))

Schools should consider a risk / benefit analysis of trips and

- a. Why? - Is it part of the curriculum /necessary or a reward trip ?
- b. Where? The Environment - Urban/cities/theme parks/outdoor activities
- d. Transport? Public/Private/walking/
- c. Visit Programme and Learning Outcomes

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

- Headteachers/ EVC's Visit Leaders and accompanying staff should refresh their current knowledge of the OEAP visits guidance [www.oeapng.info](http://www.oeapng.info)
- Review their visit itinerary and risk assessments (e.g. keep movement around large cities at least to a minimum) to ensure the Visit Leaders remain confident in running the trips.
- The UK Government has provided specific <https://www.gov.uk/guidance/reduce-your-risk-from-terrorism-while-abroad> for travel abroad. The general principles within this guidance should be considered for any off-Island visit.
- Visit staff should watch the [Stay Safe video](#) and ensure they are aware of the emergency number(s) in the relevant country(ies).
- Remote supervision management in all cities, travel hubs and crowded public spaces should be reviewed; close supervision is likely to be more appropriate, with very clear boundaries, known meeting points with plan B meeting points also in place (the impact of even a false alarm on a group that is separated could be significant). All staff and students need to be aware of the emergency contact arrangements.
- Visits Leaders need to consider allowing more time for increased security checks (at borders, events, etc.) and the impact this may have for example at air/ferry ports and other travel hubs. Those non-EU passports may experience further disruption and this needs to be considered during the planning stages.

- Before and during any visit abroad, the FCO website, <https://www.gov.uk/foreign-travel-advice> should be regularly checked for the country/ies being visited or transited.
- There should always be access to contingency funding arrangements and plan Bs in place should the need arise to make changes to itineraries. Visit leaders and schools must consider how they might manage total travel disruption and mobile/communication interruption.
- Designated 24/7 home base emergency contacts must (as always) ensure they have all necessary documentation for the respective trips and make arrangements to remain in contact with visit leaders throughout the trip.
- When arranging foreign travel, staff should always ensure they have an out of hours contact for any booking agents and/or third party provider(s).
- The Education Department's Critical Incident plan would be implemented if schools were beyond their coping mechanisms. Departmental Senior Management and Key Officers have access to documentation provided by schools for trips via Evolve.
- The school needs to be satisfied with revised control measures and any identified changes to the itinerary and the visit team must still feel confident in leading the visit, not dictate on whether an insurance company will pay out or not.

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

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

## **6. Record keeping**

### **Routine visits**

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

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

The EVOLVE system acts as a record for any visit planned and approved on the system.

Schools/establishments therefore only need to retain the following details for any particular visit:

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

In addition, schools/establishments should archive in the school/ establishment records a copy of their:

- Educational visits policy – dated so that the version current at the time of any visit can be traced;

- standard risk management procedures dated as current at the time of the visit;
- records of staff competence and training (perhaps as part of the appraisal/performance management records).

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

## 7. Monitoring

### Internal monitoring by the Head/EVC

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

Monitoring by the Head/EVC should include:

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

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

### Monitoring by the LA

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

## 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.

## Remission of fees: schools only

In order to claim remission of fees the following conditions must be met:

- the visit is to one of the eligible venues listed on the *Remission of Fees Claim Form* which can be found in the Guidance and Resources/Forms section of the EVOLVE visit planning and approval system [www.wrexhamvisits.org](http://www.wrexhamvisits.org)
- the young person's parent/guardian must be in receipt of one or more of the benefits listed on the *Remission of Fees Claim Form*.

Visit leaders who wish to claim remission of fees should complete the *Remission of Fees Claim Form* and send it, along with required attachments listed on the form, to the address given on the form.

Please note that remission of fees can only be claimed for board and lodging, not for transport to and from the venue

# **Educational Visits Policy**

## **Section B**

### **Visit approval/notification procedures**

#### **Approval and notification requirements for visits**

- All visits must be approved as set out below and a record of the visit kept as set out in 'Record keeping' section of the policy.
- Links to all relevant forms can be found in Section E of the policy and on Evolve [www.wrexhamvisits.org](http://www.wrexhamvisits.org) in the resources section

#### **Approval and notification system for all visits**

1: Routine Visits flowchart

2: Non-routine and Overnight Visits Flowchart

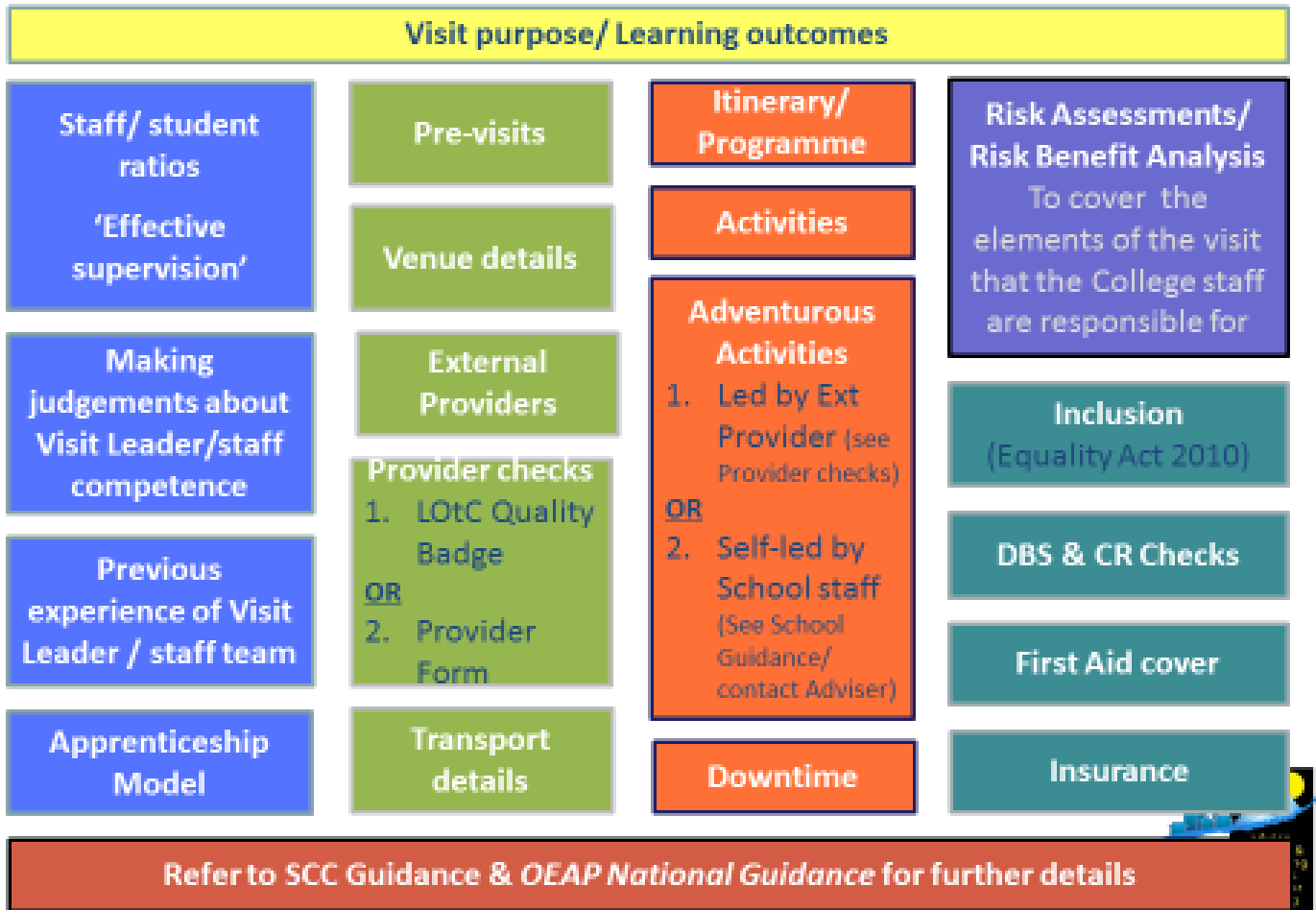
3. Visits involving demanding environments and/or adventurous activities including D of E

4. Overseas Provider led expeditions

Table 3: Definition of demanding environments

Table 4: Adventure activities

# Things to consider.....



## DOES A PROVIDER HOLD A LEARNING OUTSIDE THE CLASSROOM QUALITY BADGE



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Home

**Welcome to the Learning Outside the Classroom Quality Badge website**

The Learning Outside the Classroom (LOtC) Quality Badge provides for the first time a national accreditation combining the essential elements of provision - learning and safety - into one easily recognisable and trusted Quality Badge for all types of Learning Outside the Classroom provider organisations.

Widespread consultation with those involved with children and young people's services revealed the need for a common scheme which could provide an assurance as to the quality of the educational experiences on offer.



## 1. ROUTINE VISITS

Visit type	Planning and approval required
<p><b>Routine visits are:</b></p> <ol style="list-style-type: none"> <li>1. regular, part of the curriculum</li> <li>2. take place within, or just outside, the school/establishment</li> <li>3. within normal opening hours</li> <li>4. have a risk level that school/establishment staff are competent to manage</li> <li>5. require no payment by parents</li> <li>6. take place within 2 hours normal transport time of the school/establishment.</li> </ol> <ul style="list-style-type: none"> <li>• You should obtain this consent on an annual or other periodic basis (some schools and establishments obtain it only once when the pupil/young person first enrolls, others do it annually to pick up any changes).</li> <li>• You can add any additional information to this form if you wish.</li> </ul>	<p><b>Planning</b> Visit planned on <b>Routine Visit Planning Form</b></p> <p><b>Approval</b> By the Head <b>before the visit takes place</b> (Heads may give blanket approval for a member of staff to lead routine visits)</p> <div data-bbox="603 593 1268 1507"> <p style="text-align: center;"><b>Routine visits</b> as defined in this Visits Policy</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><b>Parental consent:</b> <b>Form for Routine visits:</b> (obtained on annual or other periodic basis)</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><b>Routine Visit Planning Form</b> (completed by <b>Visit Leader</b> and copy left with emergency contact)</p> <p style="text-align: center;">↓</p> <p style="text-align: center;"><b>Final Approval by Head</b> 28-14 days prior to visit start date (Heads may give 'blanket final approval' for routine visits)</p> </div>

## 2. NON-ROUTINE AND OVERNIGHT VISITS

### Non-routine & Overnight non-adventurous visits

i.e. Cardiff visits/  
London cultural visits

**Note 1)** To download a:

- *Non-routine visit parental consent form*
- *Independent Provider Questionnaire*
- *Form OE1*

log in to Evolve  
[www.wrexhamvisits.org](http://www.wrexhamvisits.org)

click on 'resources'  
then click on 'forms'.

Providers holding the  
LOtC – Learning Outside the  
Classroom Quality Badge do  
not need to complete

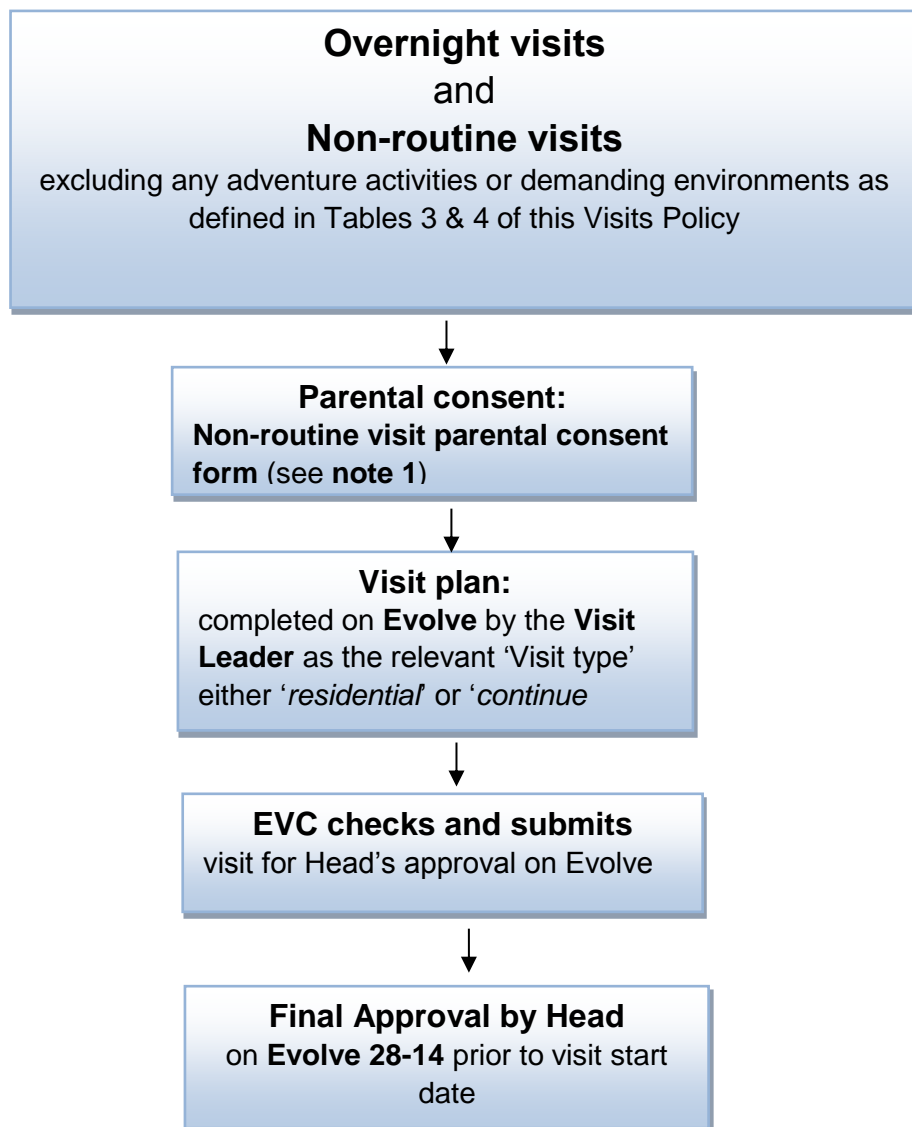
### Planning

Visit planned using the EVOLVE system [www.wrexhamvisits.org](http://www.wrexhamvisits.org)

### Approval

By the Head on the EVOLVE system **before the visit takes place.**

**Visits that have not been approved by the Head on the Evolve system MUST NOT TAKE PLACE.**



### 3. VISITS INVOLVING DAYS IN DEMANDING ENVIRONMENTS – SEE TABLE 3 BELOW AND/OR ADVENTEROUS ACTIVITIES SEE TABLE 4 BELOW

#### Staff-led adventure activities / demanding environment trips e.g. D of E – the staff member must gain LA leader approval on Evolve before planning a trip.

Apply for this by:

- clicking on 'My profile'
- training and awards on the home page of evolve
- follow the instructions.]

**Note 1** To seek LA leader approval the leader must log in to Evolve, **CLICK ON 'HOW TO APPLY FOR LA LEADER APPROVAL' ON THE HOME PAGE FOLLOW THE INSTRUCTIONS EXACTLY**

**Note 2** to download the:

- **Non-routine visit parental consent/ adventure consent form**
- **Independent Provider Questionnaire (IPQ)**

log in to Evolve

[www.wrexhamvisits.org](http://www.wrexhamvisits.org)

- click on 'resources'
- click on 'forms'.

**Note 3** Providers holding LOTC – Learning Outside the Classroom Quality Badge do not need to complete an IPQ

Visits that have not been given Final Approval as set out in this chart **MUST NOT TAKE PLACE.**

#### Planning

Visit planned using the EVOLVE system [www.wrexhamvisits.org](http://www.wrexhamvisits.org)

#### Approval

**Approved by the Head on the EVOLVE system at least 28 days before visit start date.** LA approval required – Evolve automatically applies for this after the Head approves the visit using their PIN number.

**Visits that have not been approved by the LA on the Evolve system MUST NOT TAKE PLACE.**

#### Visits involving adventure activities, field studies or demanding environments (including overnight and Duke of Edinburgh's Award Expeditions)

as defined in Tables 3 & 4 of this Visits Policy

Activity to be led by a Provider

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

Obtain Providers **LOTc Quality Badge** Number or satisfactorily completed **Independent Provider Questionnaire** obtained prior to booking (see note 2)

Leader must obtain **LA leader approval** on Evolve **BEFORE** planning any visits (see note 1)

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

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

#### EVC checks and submits

\_visit for Head's approval on Evolve

**Approval by Head on Evolve**  
**at least 28-14 days** prior to visit start date

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

## 4. OVERSEAS PROVIDER LED EXPEDITION

**Overseas expeditions** organised through an independent provider (*i.e. expedition to a developing country involving trekking or other adventure activities*)

**Note 1)** To download the

- **Non-routine visit parental consent form**
- **Independent Provider Questionnaire (IPQ)**
- **Form OE1**

Log in to Evolve

[www.wrexhamvisits.org](http://www.wrexhamvisits.org)

- click on 'resources'
- click on 'forms'.

**LOtC – Learning Outside the Classroom Quality Badge** - Providers who hold this do not need to complete and IPQ

### Planning

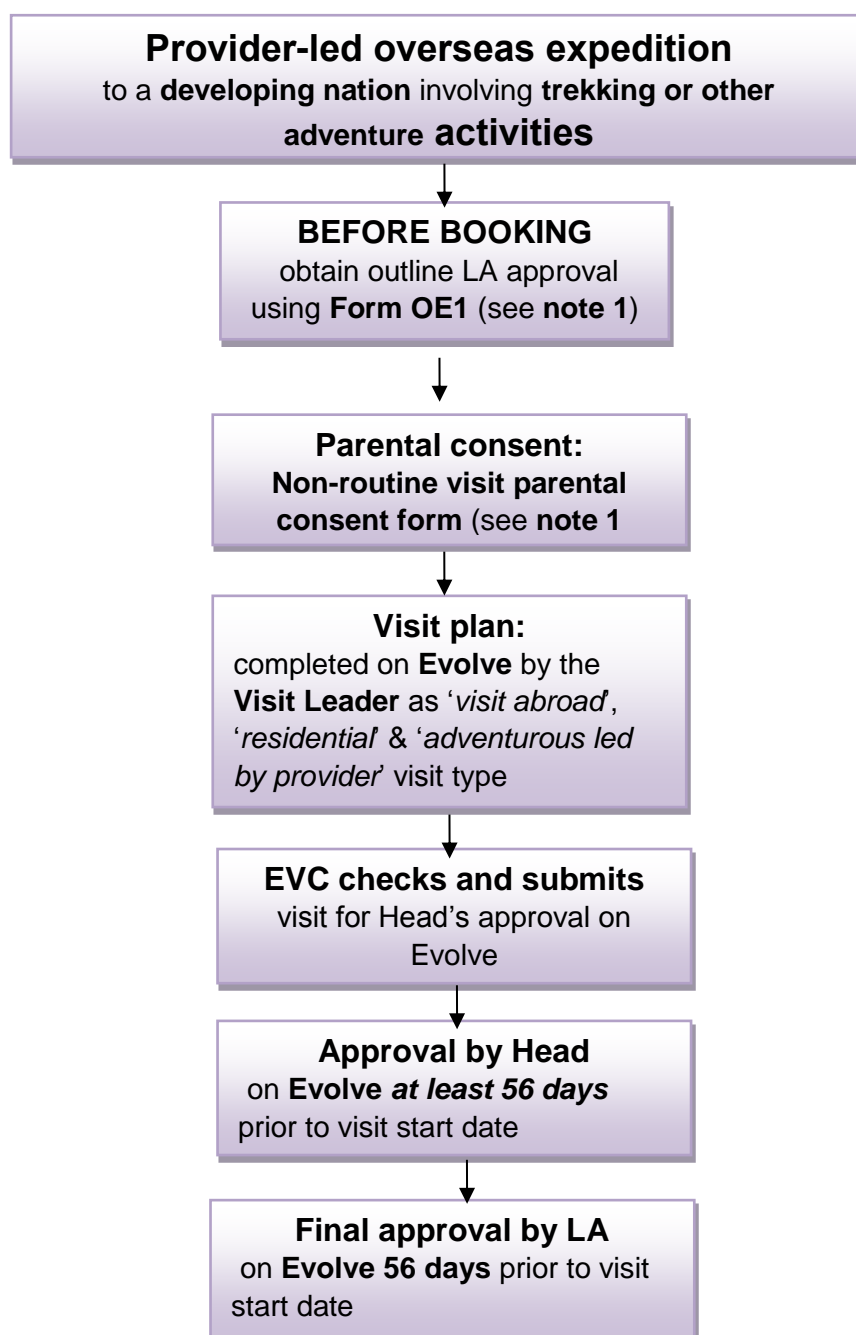
Visit planned using the EVOLVE system [www.wrexhamvisits.org](http://www.wrexhamvisits.org)

### Approval

LA Approval is in two stages:

- **Initial approval** before booking using form OE1 (available on Evolve by clicking on 'guidance and resources' and then 'forms')
- **Final approval** on the Evolve system at least 8 weeks before the visit

**Visits that have not been approved by the LA on the Evolve system MUST NOT TAKE PLACE.**



**Table 3. Definition of demanding environments.**

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

Location	Definition	Level of approval required
<b>Normal countryside</b>	<p>Areas;</p> <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>	<p>Approval by Head required.</p> <p>LA approval <b>not</b> required.</p>
<b>Demanding environments</b>	<p>Areas where there is significant risk to the group from <b><u>one or more</u></b> of the following factors;</p> <ul style="list-style-type: none"> <li>• <b>Hazardous terrain</b> (e.g. cliffs, very steep slopes etc.)</li> <li>• <b>Remoteness</b> (i.e. more than 30 minutes walking time from the nearest normal vehicle access point from which the group could be evacuated)</li> <li>• <b>Difficult escape</b> (i.e. places where the group could be trapped and/or where they would need specialist help to escape)</li> <li>• <b>Exposure to severe weather</b> (i.e. open to the weather and no easily accessible shelter within 30 minutes walking time for any of the group)</li> <li>• <b>Open areas without clear boundaries</b> where the group might stray into hazardous or remote terrain in poor visibility</li> <li>• <b>fast flowing water, deep water, or water with strong currents (including tidal flow) where:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> the group will be close to the water <b>and</b> there is a significant risk of someone falling in;</li> <li><input type="checkbox"/> the group will be entering the water.</li> </ul> </li> </ul>	<p><b>Approval by LA on Evolve required</b> (following Head's approval on Evolve).</p>

## Table 4. Adventure activities

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

Additional guidance may be issued on such activities eg Trampoline Parks – for these **log on to Evolve**, click **Resources** and then **Guidance**.

Land Based Activities	Water Based Activities
Rock climbing/abseiling including climbing walls	Kayaking and canoeing
Mountaineering	Sailing and windsurfing
Hill walking	White water rafting
Ice climbing	Waterskiing
Gorge or coastal scrambling/sea cliff traversing/coasteering	Snorkel and aqualung diving
Underground exploration – cave or mine	All forms of boating including powerboating but excluding commercial transport)
Skiing (snow/dry slope)	Improvised rafting
Air activities (except commercial flights)	Kite surfing
Horse riding and pony trekking	Surfing and body boarding
High ropes courses and zip wires	Dragon boating
Quad biking/ATV's	Wave skiing
Orienteering	Jet skiing/personal water craft
Mountain biking	SUP Stand Up paddle boards
Paintballing	
<p>Any activity <b>including</b></p> <ul style="list-style-type: none"> <li>• <b>camping</b></li> <li>• <b>fieldwork</b></li> <li>• <b>non-adventure activities</b></li> </ul> <p>taking place in <b>demanding environments</b> as defined in Table 3 above</p>	

## Section C                      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.

- You **must** amend the risk management procedures in this section to reflect the way that **your** visit leaders manage off site visits.
- It is important that it reflects actual practice on visits run by your school/establishment – **if it's written down then all will be expected to comply.**
- Once completed, this is the standard risk assessment for all off site visits run by your school/establishment.
- The only additional written risk assessment any visit leader would need to undertake is for risks that are **above and beyond** those set out in the standard school/establishment risk assessment.
- **For Joint Visits** - those involving one or more schools from within one County or schools from across a number of Counties **then all participating schools** must agree and sign the **Risk Management Agreement Plan** for **the trip**. See below

These might include trips to Glan Llyn, Skiing, Sporting Events

For the **Joint Schools Skiing Trips** run under **North Wales Schools Skiing** the guidance notes found on Evolve in Resources and Guidance must be followed

## Risk management form: All off site visits

<b>Significant hazards and harm which may occur</b>	<b>Who might be harmed?</b>	<b>Safety measures:</b> <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 to 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 to stand in 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 sun cream 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 recognized LA bus company is used 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
Shark fishing	All	Wear shark-proof swimming costume Swim away quickly if one attacks
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 in local countryside	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

**Risk Management Form:****Joint school Visits**

*This form should then be scanned and attached to the Evolve visit form.*

<b>Farm Visits</b> Machinery, vehicles, risk of allergy, contamination, bites, kicks, etc	Pupils and staff	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
<b>Castle visits</b> High walls – falls Steep, dark stairs - falls	Pupils and staff	Visit leader knows venue and specific areas of risk in the castle (following recce) Brief other staff Supervise pupils appropriately

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

Participating schools: Date risk assessment completed: Completed by: Date of visit to <b>XXXXXX</b> : <b>Significant hazards and harm which may occur</b> Transport to and from venues: <ul style="list-style-type: none"> <li>Road traffic accidents</li> <li>Behavioural issues</li> </ul>	<b>Who might be harmed?</b> Pupils Staff	<b>Safety measures:</b> <i>Measures that are in place and/or will be taken to reduce the risk to a tolerable level</i> Ensure recognised LA bus company is used Ensure seat belts are worn at all times by staff and pupils and are checked by school visit leader Visit leader to have available information re pupils and staff in case of an emergency en route - first aid kit / sick kit. Expectations of behaviour to be communicated to pupils at the beginning of the journey - e.g. pupils remain seated. School staff supervise the pupils in their care to ensure they behave appropriately during the journey.
Accident/emergency: <ul style="list-style-type: none"> <li>To pupil</li> <li>To member of staff</li> </ul>	Pupils Staff	Follow <b>xxxxxxx</b> and school's own emergency procedures in the event of an incident. Ensure all staff understand emergency procedures. Brief children of what to do in an emergency and how to summon help. Ensure County accident / incident form is completed. If an adult emergency, ensure enough supervisory cover remains throughout the visit.
Medical conditions (staff and pupils) & behavioural issues	Pupils Staff	Ensure all consent forms are completed correctly prior to the visit and consent is given for staff member to administer medicine if required. Ensure medical conditions of staff and pupils are disclosed prior to the visit and known to organising staff (including <b>XXXXX</b> staff). IEBPs /Personal Risk Assessment must be brought and shared with supervisory staff as and when appropriate Ensure medicines, epi pens, inhalers, etc supplied are stored safely and available to use in emergency. Inhalers to be accessible to pupils during activity sessions Ensure at least one staff member/adult volunteer knows how to administer medicine if required.
Time outside of Centre staff-led	Pupils	Pupils given guidelines re expected behaviour around the centre between activities.

activities (including before/between/after activities, mealtimes and overnight):	Staff	School's own behaviour policy to be implemented. Ultimate responsibility with staff from the individual schools. Pupils are reminded of the rules / boundaries regularly. School staff to be responsible for their pupils during free time and meal times.
<ul style="list-style-type: none"> <li>Behavioural issues</li> <li>Stranger danger</li> </ul>		
Centre staff-led activities	Pupils	Inform supervisory staff of any issues regarding medical or behaviour.
<ul style="list-style-type: none"> <li>Behavioural issues</li> <li>Emergency or accident to pupil or staff member</li> </ul>	Staff	Staff to report any incident or accident to manager of Centre and follow accident / emergency procedures.
Behavioural issues	Pupils	Agree standards of behaviour and sanctions prior to trip and ensure pupils and staff are aware of this
	Staff	School staff supervise and manage the behaviour of pupils in their care School's own behaviour policy to be implemented.

## Risk management Agreement: Joint Trip

Date of Visit:

Enw cynrychiolydd	School / Ysgol	Date / Dyddiad

# **Educational Visits Policy**

## **Section D**

### **Emergency action flowchart for Visit Leaders and Critical Incident Procedures**

This document sets out the action to be taken, in the event of an Emergency /Critical incident on an educational visit. Schools/ Establishments are provided with emergency action flowcharts and this must be carried by all visit leaders taken part in any offsite activity or visit. This topic is also dealt with during Educational Visits Coordinator (EVC) training and Emergency Action Training which is a mandatory course for all schools / establishments involved in the provision of Educational (off-site) Visits for young people or vulnerable adults.

### **Definitions**

A critical incident on an educational visit is defined as an incident requiring the emergency services that affects participants on an off-site visit organised by a school or other LA service for young people or vulnerable adults.

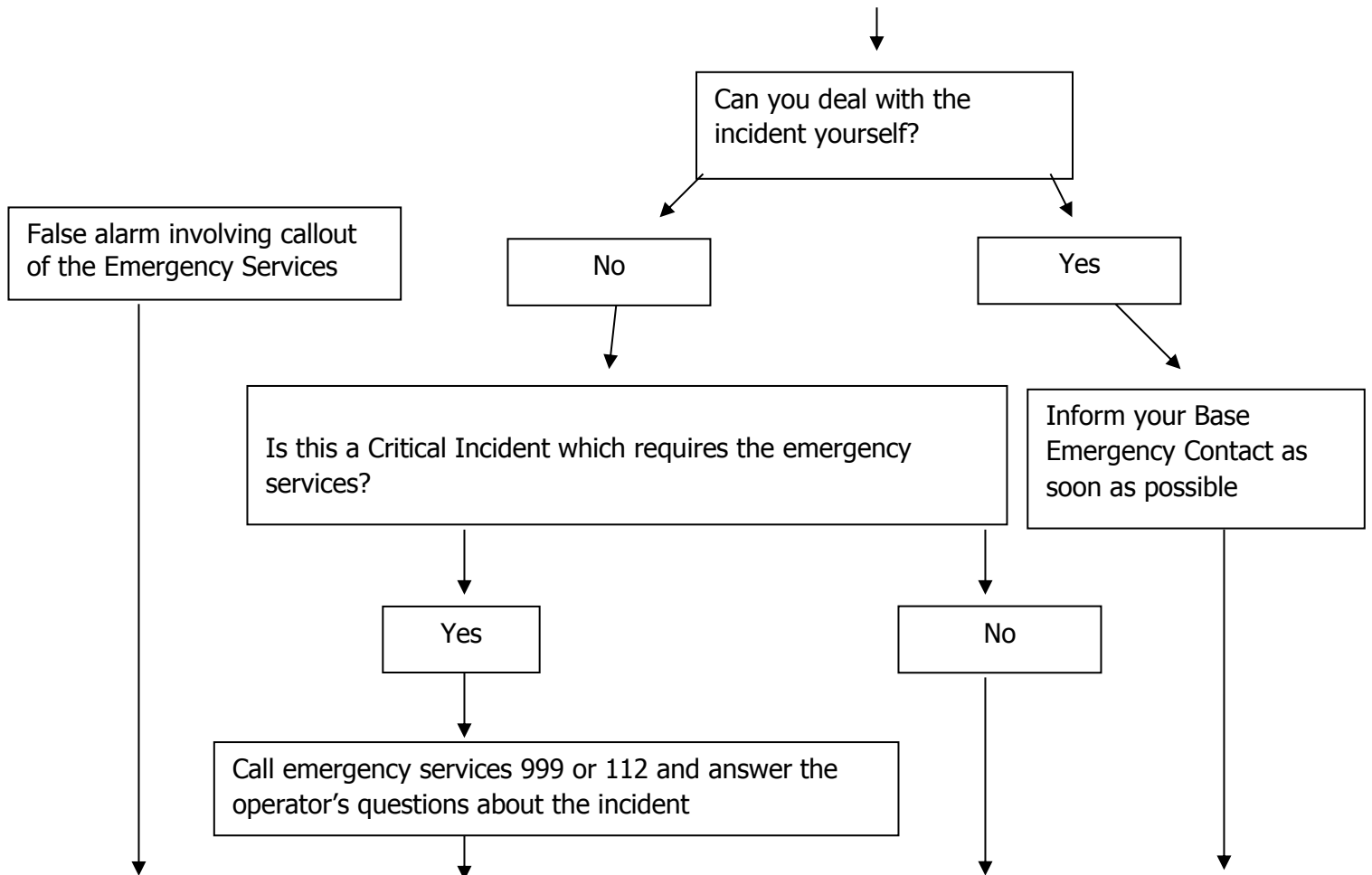
**A Critical incident which goes beyond the coping mechanisms of the Visit Leadership Team and the Establishment**

1. Incident: a situation dealt with by the Visit Leader, who remains in control and can cope
2. Emergency: an incident that overwhelms the coping strategies of the Visit Leader so that they refer to the Emergency Contact for help
3. Critical Incident: an incident that meets the definition and is probably overwhelming the coping strategies of both the Visit Leader and the school's Visit Emergency Plan.
4. Major Incident: declared as such by the UK Police or Foreign and Commonwealth Office etc

## Visit Leader Emergency Action Flowchart

**Do not speak to the media – direct all media enquiries to 01978 292289 or (out of hours Chester Care – 01978 264240)**

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



Call your school/establishment Base Emergency Contact school/establishment number (during school/establishment hours) Base Emergency Contact's number (out of school/establishment hours). Answer Base Emergency Contact's questions about the incident (as set out on Form 5 and 6).

In the event of a Critical Incident or serious incident that can't be dealt with by yourself and where your Base Emergency Contact is not contactable contact the LA:

- **Office hours – number(01978 295400)**
- **Out of office hours – number(01978 264240)**

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

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

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

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

**Do not speak to the media – direct all enquiries to 01978 292289 or (Chester Care – 01978 264240)**

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

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

**YES**

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

Can the school/establishment handle this internally?

**NO**

Call for external assistance from Emergency Services if required (if not already called by Visit Leader): 999 or 112

**YES**

Arrange assistance as required by staff at the scene of the incident if possible eg transport / evacuation.

ASAP inform the LA that this is a **Critical Incident**:

- **Office hours – number(01978 295400)**
- **Out of office hours – number(01978 264240)**

Continue to man the phone and coordinate support until the incident is resolved.

## **Follow-up**

Complete LA incident/accident report form (CSU1) & send to LA.

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

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

## Educational Visits: initial incident notes

NB This form can be used by the Base Emergency Contact (or LA call handler) to take rough notes during the period that they are handling an emergency call. The EVC must ultimately ensure that the LA incident/accident reporting procedures (CSU1) are completed as soon as possible after the incident.

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

\_\_\_\_\_

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

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

\_\_\_\_\_

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

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

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

\_\_\_\_\_

\_\_\_\_\_

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

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

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

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

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

Form completed by\_\_\_\_\_Date\_\_\_\_\_



# Critical Incident Management

## Roles and Responsibilities

### Roles and responsibilities - educational visit leader

Educational visit leader - initial response	Named person responsible
Ascertain the whereabouts of all pupils and staff. Ensure the emergency services are aware of anyone who is unaccounted for.	
Contact the Headteacher (or nominated emergency contact) to ask for support. Remember to clarify international dialling codes if abroad.	
Establish a basic overview of the incident. Ensure that accurate, factual information is available for those arriving on-scene.	
Establish arrangements to meet the immediate welfare needs of pupils and staff.	
Identify pupils with Special Educational Needs (SEN) and anyone who may be particularly vulnerable. Inform the emergency services of any pupils or staff with known medical conditions or requirements.	
Ensure that a member of staff accompanies any pupils to hospital but remember the safety of everyone else, even if unharmed. Do not leave anybody on their own and try to maintain an adequate adult / pupil ratio.	
Ensure other staff are briefed (and given tasks) on a regular basis. Ask staff to maintain a log of actions taken and decisions made.	
Keep a log of important information, actions taken and decisions made.	
Remember to retain any important items / documents. E.g.: <ul style="list-style-type: none"> <li>▪ Contact details</li> <li>▪ Consent forms (including medical and next-of-kin details)</li> <li>▪ Maps</li> <li>▪ Tickets</li> <li>▪ Insurance policies</li> <li>▪ Proof of identity</li> <li>▪ Passports (if abroad).</li> </ul>	
Avoid making comments to the media	
Do not discuss legal liability with others.	

Educational visit leader - ongoing response	Named person responsible
Continue to assess any risks to pupils and staff. Take action to prevent further harm if necessary.	
Act as the main contact for co-ordination of the response and work closely with the headteacher / nominated emergency contact. Continue to liaise with the emergency services and other organisations.	
Continue to brief staff and allocate tasks on a regular basis.	
Monitor and reassure pupils. Make arrangements for the longer-term welfare needs of pupils and staff.	
Consult the headteacher (or nominated emergency contact) about arrangements for notifying parents / carers and reuniting them with their children.	
Liaise with the tour operator / provider, if appropriate.	
Try to obtain the names and contact details of any witnesses to the incident. If possible, obtain a written account from them.	
If abroad, contact the Foreign & Commonwealth Office for support.	
If abroad, check your insurance policy and seek insurance / legal advice before incurring any substantial expense (e.g. medical treatment).	
Retain any receipts / documentation for insurance purposes. E.g.: <ul style="list-style-type: none"> <li>▪ Records of expenditure</li> <li>▪ Medical certificates / hospital admission forms</li> <li>▪ Police incident number.</li> </ul>	
Check that everyone who should have been notified of the incident has been informed. Remember that information given must be limited until the facts are clear and all parents / carers have been notified.	
Ask the headteacher (or nominated emergency contact) to assist with developing a media statement, with support from other organisations as appropriate. Devise an ongoing strategy for dealing with media requests.	
Ask pupils and staff to avoid speculation when talking to the media. Try to prevent the spread of misinformation (especially through the use of mobile phones).	

Educational visit leader - recovery	Tick / sign / time
Please refer to appendix 1 for providing welfare arrangements and post incident support after the initial emergency response.	
Complete any necessary forms / paperwork.	

## Roles and responsibilities – Base Contact

Co-ordination - initial response	Named person responsible
Establish a basic overview of the incident.	
<p>If the incident has occurred on an educational visit:</p> <ul style="list-style-type: none"> <li>▪ Liaise with the educational visit leader on a regular basis</li> <li>▪ Consider sending extra staff to support the educational visit leader</li> <li>▪ Discuss with the educational visit leader the arrangements for notifying parents / carers</li> <li>▪ Consider how parents / carers and pupils will be reunited.</li> </ul>	
<p>Wherever possible, assign members of staff to relevant School Emergency Management Team (SEMT) roles:</p> <ul style="list-style-type: none"> <li>▪ Communications</li> <li>▪ Log-keeping</li> <li>▪ Media management</li> <li>▪ Resources</li> <li>▪ Welfare.</li> <li>▪ Business continuity</li> </ul>	
<p>Remember to:</p> <ul style="list-style-type: none"> <li>▪ Allocate tasks amongst the SEMT</li> <li>▪ Ensure that staff are clear about their designated responsibilities</li> <li>▪ Establish the location and frequency of SEMT / staff briefings</li> <li>▪ Ask staff to maintain a log of actions made and decisions taken</li> <li>▪ Assign a log-keeper to provide administrative / secretarial support.</li> </ul>	
Inform all other staff of the incident. Ensure staff are briefed (and given tasks) on a regular basis.	
Work closely with other organisations (e.g. emergency services, local authority) as required. Provide accurate and factual information to those arriving on-scene.	
Ascertain the whereabouts of all pupils, staff and visitors. Ensure the emergency services are aware of anyone who is unaccounted for.	
Inform governors as appropriate.	
Decide the most appropriate method of contacting relatives of pupils / staff affected by the incident. If the matter is very serious (such as a fatality) liaise with the Police about informing next of kin.	
Act as the main contact for co-ordination of the response. Continue to liaise with the emergency services and other organisations	
Continue to allocate tasks amongst the SEMT. Work closely with the SEMT to co-ordinate their actions and help to resolve any complications or difficulties that arise.	
<p>Ensure that regular briefings are given to:</p> <ul style="list-style-type: none"> <li>▪ Staff</li> </ul>	

<ul style="list-style-type: none"> <li>▪ Pupils</li> <li>▪ Parents / carers</li> <li>▪ Governors</li> </ul> <p>Extended services.</p>	
Check that everyone who should have been notified of the incident has been informed.	
In the event of a serious injury or fatality, report the incident to the Health and Safety Executive (HSE) as soon as possible.	
Seek advice on legal and insurance issues, if appropriate.	

<b>Co-ordination - recovery</b>	<b>Named person responsible</b>
Act as the main contact for the recovery process. Continue to allocate tasks amongst the SEMT and other staff.	
Ensure that post incident support is available to all who may require it	
Work closely with the 'resources' role in organising remedial work to property and liaise with insurance companies, salvage specialists and loss adjusters as appropriate.	
Complete any necessary forms / paperwork.	
Arrange a debrief for school staff involved in the response.	
Represent the school at other debriefs which may take place	
Initiate a review of the school emergency plan.	

# POST INCIDENT SUPPORT

Post incident support - assistance for pupils and parents / carers	Named person responsible
Introduce a strategy to monitor pupils and staff who may be particularly affected by the incident. Ensure that staff are aware of this strategy.	
Offer pupils and staff the opportunity for psychological support and counselling. Ensure staff and pupils know that support is available and arrange access to these services as necessary.	
Consider which pupils need to be briefed, how, and by whom.	
Provide opportunities for pupils to discuss their experiences (e.g. promoting discussion during class, arranging a special lesson). Do not discourage pupils from talking about their experiences.	
Consider providing relevant books in the school library.	
Arrange for a member of staff to visit those affected (at home or at hospital). Ask for consent from parents / carers before doing this.	
Make arrangements to express sympathy to those who have been hurt. Consider encouraging pupils to send cards / messages to those affected.	
Be sensitive about the demands practical issues might make on pupils (e.g. deadlines for coursework, imminent exams).	
<p>Send a letter to parents / carers with information on:</p> <ul style="list-style-type: none"> <li>▪ The nature of the incident</li> <li>▪ How their child was notified of the incident</li> <li>▪ Arrangements for support organised by the school</li> <li>▪ Who to contact if they would like additional support.</li> </ul>	
Maintain regular contact with parents / carers.	
Do not make public any sensitive / confidential information about individuals unless consent has been given by pupils and parents / carers.	
Consider organising an event for parents / carers to discuss any issues or concerns they might have.	
If pupils who were particularly affected by the incident leave school (e.g. transferring from primary to secondary education) consider, sensitively and confidentially, notifying the headteacher of the new school.	

Post incident support - general actions	Named person responsible
Request support from educational professionals trained in psychological debriefing, critical incident stress debriefing, bereavement counselling and trauma management if appropriate.	
<p>Consider requesting support from other organisations. E.g.:</p> <ul style="list-style-type: none"> <li>▪ Teacher Support Network</li> <li>▪ Samaritans</li> <li>▪ Cruse Bereavement Care.</li> </ul>	
Manage any distress that could be caused by ongoing Police enquiries, legal proceedings and media attention.	
Cancel or rearrange any events which are inappropriate.	
Plan appropriate support for staff to enable them to cope with any questions or discussions pupils might have about the incident.	
Ensure that any new roles given to staff do not place too great a burden. Over time, staff may need to be relieved of any additional responsibilities given to them.	
Ensure that new staff are aware of the incident, which pupils were involved and how they were affected.	
Consider any actions which can be taken to support the local community if affected by the incident (e.g. fund raising).	

## Roles and responsibilities - communications

<b>Communications - initial response</b>	<b>Named person responsible</b>
Dedicate telephone lines for incoming and outgoing calls. Arrange extra support at reception if necessary.	
Record a new message on the school answer phone if appropriate. Consider setting it to 'answer only' mode.	
Support staff with any communication needs they may have.	
Inform those involved in the response of any communication difficulties (e.g. poor mobile signal in the area).	

<b>Communications - ongoing response</b>	<b>Named person responsible</b>
<p>Ensure regular information is provided to:</p> <ul style="list-style-type: none"> <li>▪ Pupils</li> <li>▪ Parents / carers</li> <li>▪ Governors</li> <li>▪ Extended services.</li> </ul>	
Consider the most effective arrangements for contacting pupils and parents / carers. Ensure that records of calls made to parents / carers are maintained.	
<ul style="list-style-type: none"> <li>• Do not speak to the media – direct all enquiries to LA press officer</li> </ul>	
Update the school answer phone on a regular basis.	
<p>Liaise with the 'co-ordination' role in sending a letter home to parents / carers. This could include information on:</p> <ul style="list-style-type: none"> <li>▪ What has happened</li> <li>▪ How their child was involved</li> <li>▪ The actions taken to support those involved</li> <li>▪ Who to contact if they have any concerns or queries.</li> </ul>	
In the event of a major emergency, seek support from the local authority; they may be able to establish a helpline for enquiries from the public.	

<b>Communications - recovery</b>	<b>Named person responsible</b>
Provide regular briefings to pupils and parents / carers.	

## Roles and responsibilities - log-keeping

Log-keeping - initial response		Named person responsible
Attend SEMT briefings. Keep a log of important information, actions taken and decisions made.		
Ensure that each member of staff keeps an incident log.		

Log-keeping - ongoing response		Named person responsible
Provide administrative / secretarial support to the SEMT.		
Keep accurate records of anyone admitted to hospital or treated by the emergency services.		

Log-keeping - recovery		Named person responsible
Collate all incident logs, making copies if necessary.		
Ensure records related to the incident are archived securely but make these available to authorised staff for future reference (e.g. in the event of a debrief or enquiry).		



## Roles and responsibilities - media management

Media management - initial response	Named person responsible
<ul style="list-style-type: none"> <li>Do not speak to the media – direct all enquiries to LA press</li> </ul>	
<p>Seek support from other organisations (e.g. emergency services, local authority) in responding to media requests.</p>	
<p>Ensure media access to the site, staff and pupils is controlled. Do not let the media onto the school site or give them access to pupils unless there is a specific reason for doing so and permission / consents are in place. Ask for support from the Police if necessary.</p>	
<p>Designate a specific area for the media away from the main entrance to the school, so they do not prevent or intimidate people entering and leaving the site.</p>	
<p>Develop a brief media statement (designed to provide reassurance) on behalf of the school. Information given must be limited until the facts are clear and all parents / carers have been notified.</p>	
<p>Arrange for an appropriate member of staff to act as a spokesperson (preferably this person will have received media training). If a suitable spokesperson is unavailable the Police or local authority may be able to undertake this role.</p>	
<p>Be prepared to be interviewed by the media.</p>	

<b>Media management - ongoing response</b>	<b>Named person responsible</b>
Devise an ongoing strategy for responding to media requests. Work closely with the media to establish what information they require and when their deadlines are.	
Gather information from the SEMT, emergency services and other organisations as appropriate.	
Provide regular statements to the media. Ensure each message conveys an accurate, consistent and reassuring message. All press releases should be checked and agreed by the emergency services (and other organisations as appropriate).	
Advise staff on where to direct media enquiries. Ask staff, pupils and parents / carers to avoid speculation when talking to the media.	
Try to prevent the spread of misinformation (especially through the use of mobile phones).	

<b>Media management - recovery</b>	<b>Named person responsible</b>
Keep the media informed of developments in the recovery process. Present a positive and reassuring image to the public.	
Be aware of media interest in memorials or anniversaries of the event.	

## Roles and responsibilities - resources

Resources - initial response	Named person responsible
Ensure the emergency services can access / egress the school without hindrance. Consider sending a member of staff to the school entrance to prevent people restricting access by parking in unsuitable places.	
<p>Work with other staff and the emergency services to control access to the school:</p> <ul style="list-style-type: none"> <li>▪ Advise staff and governors that they might have to prove their identity before the emergency services will grant them access.</li> <li>▪ Provide authorised visitors with identification badges and ensure they sign-in and sign-out.</li> <li>▪ Ensure that media access to the site is controlled.</li> </ul>	

Resources - ongoing response	Named person responsible
<p>Establish safe and secure areas to assist the response. E.g.:</p> <ul style="list-style-type: none"> <li>▪ SEMT briefing room</li> <li>▪ Briefing area for parents / carers</li> <li>▪ Media briefing room.</li> </ul>	
Work closely with staff and other organisations to provide access to facilities and resources as required. This may involve opening or closing parts of the school.	
Ensure the school site is secure (e.g. provide temporary fencing around damaged areas, arrange for broken windows to be boarded).	

## Roles and responsibilities - welfare

Welfare - initial response	Named person responsible
Establish arrangements to meet the welfare needs of pupils, staff, parents / carers, visitors and responders.	
<p>Identify pupils who may require additional support:</p> <ul style="list-style-type: none"> <li>Those with Special Educational Needs (SEN)</li> <li>Those with medical needs</li> <li>Anyone who may be particularly vulnerable or badly affected (e.g. those who were involved in, or witnessed, the incident).</li> </ul>	

Welfare - ongoing response	Named person responsible
Assess the welfare and emotional needs of all those involved. Continue to monitor and support those who may be particularly affected by the incident.	
Make arrangements for reuniting pupils with their parents / carers. Ensure that a member of staff is present to meet and greet them.	
In groups as small as practicable, inform pupils about the incident. Consider the best way to convey bad news. In the event of a tragic incident, consider seeking support from educational psychologists about the best way to inform and support pupils..	
Where possible, every child should to be spoken to, and asked if they are alright, before they leave school.	
Take account of religious and cultural factors. Consider contacting religious leaders within the community for support.	
Ensure that staff take regular rest periods.	

Welfare - recovery	Named person responsible
Please refer to XXXX for information on welfare arrangements and post incident support after the emergency response.	

# Section E Planning forms

## IMPORTANT NOTE:

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

These include:

- **Routine Visit Planning Form**
- **Parent/Carer Consent Routine Visits**
- **Summary of Participant information**
- **Parent/carers consent form for non-routine visits**
- **Remission of fees claim form**
- **Overseas expedition planning forms**
- **Visit evaluation form**
- **Independent Provider form**
- **Risk Assessment form**
- **Form OE – LA Outline approval for Overseas Expeditions**
- **Educational Visits - initial Incident notes**

Form 1:	Parent/carers consent form: routine visits
Form 2:	Routine visits: planning form
Form 3:	Summary of information about participants
Form 6:	Incident record form