

Guidelines for Educational Visits

Foreword, Director of Education and Children's Services

Educational visits are a key element of the richness and quality of education provision which we seek to achieve in Midlothian. Such visits help to extend the experiences of our young people, help to develop greater independence and, in many cases, encourage the development of investigative skills.

Most visits organised by schools take place without any incident. However, a number of recent incidents involving school parties in other parts of the U.K. have brought the safety of young people involved in out of school visits sharply into scrutiny. These policy guidelines have been issued to assist Midlothian schools in planning and managing out of school visits to ensure, as far as possible, the safety of all children and young people taking part.

The guidelines supersede previous memoranda adopted from the former Lothian Regional Council and draw on good practice recommended in various national circulars on Safety in Outdoor Education. As such, they contain a number of important amendments to the Council's existing arrangements eg in terms of supervision ratios, emergency procedures, which Heads of Establishment should ensure are brought to the attention of all staff involved in out of school visits.

Although the guidance is primarily intended for use in schools, it applies equally to visits arranged by the Community Education Service.

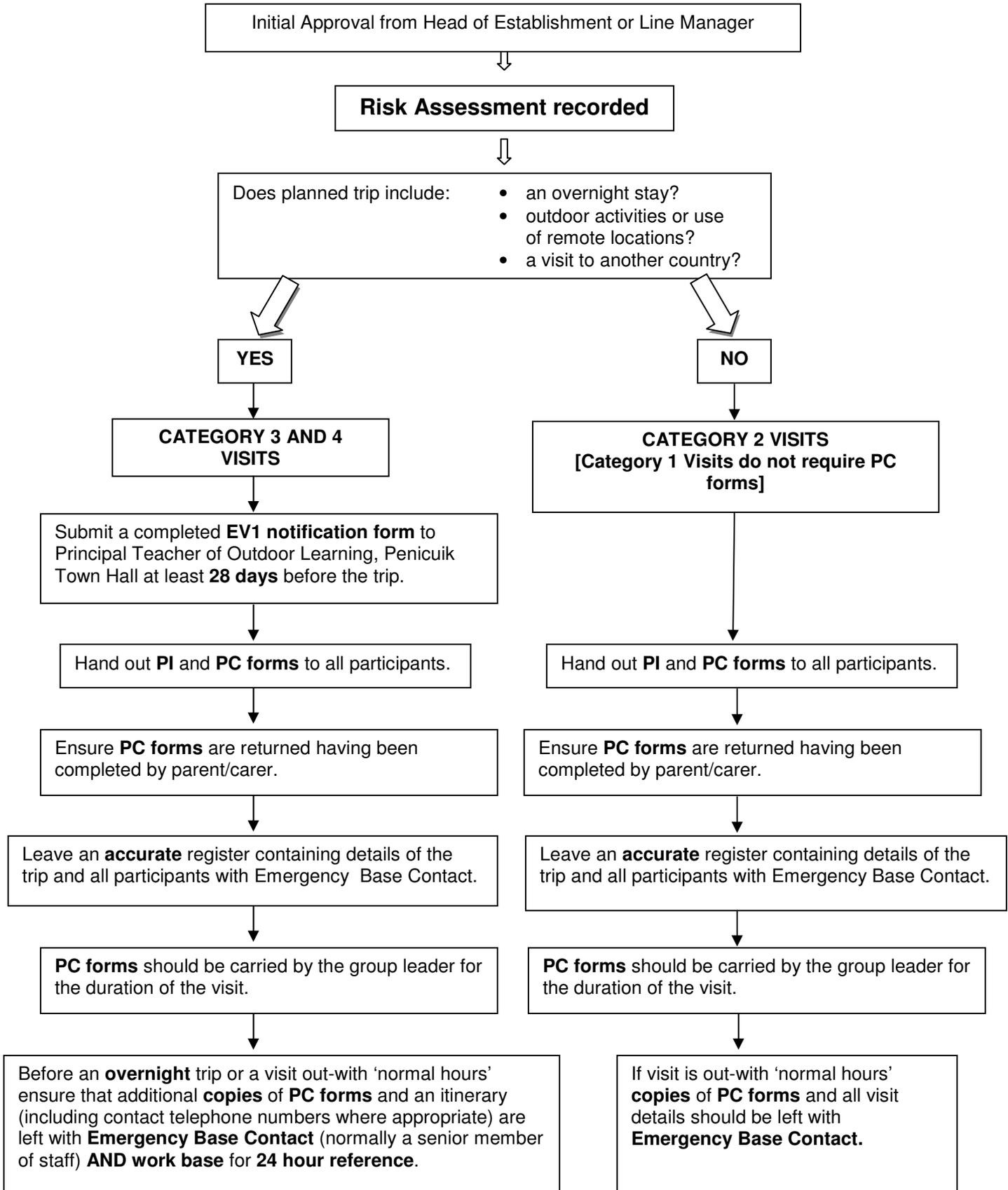
These guidelines are not intended to discourage schools from making visits by identifying hazards; rather, they set out clear guidance and procedures by which Head Teachers, party leaders and other organisers can ensure sound safety management systems are in place when taking pupils out of school.

I have asked that the implementation of the guidelines be monitored carefully over the next 12 months, taking account of any difficulties which may arise. Meantime, schools should direct any queries arising from the guidelines to Outdoor Education Organiser, Penicuik Town Hall (Tel: 01968 664043).

Donald MacKay
Director, Education and Children's Services

MIDLOTHIAN COUNCIL – EDUCATION AND CHILDREN’S SERVICES

WHAT TO DO – A SIMPLE GUIDE for EDUCATIONAL VISITS



Where PC forms indicate a child/young person in need of medication, group leaders should ensure that the appropriate medicine is taken with the child/young person or group leader.

TABLE OF CONTENTS

Chapter	1	Introduction	Page	1
	1.5	MUST DO Summary		1
	1.7	Definitions and Categories of Visits		1
	1.8	Categories of Visits		2
Chapter	2	Principles of Safety Management	Page	3
	2.2	Duty of Care		3
	2.5	Well Defined Objectives		3
	2.6	Risk Assessment		3
	2.7	Adequate Supervision		3
	2.8	Training of Staff		3
	2.9	Clearly Defined Roles		4
	2.10	Good Communication		4
	2.11	Planning and Preparation		4
	2.12	Monitoring		4
	2.13	Evaluation		4
Chapter	3	Planning Visits	Page	5
	3.2	Authorisation		5
	Step 1	Initial Approval: Head of Establishment		5
	Step 2	Detailed Planning and Risk Assessment: Group Leader		5
	Step 3	Authorisation: Head of Establishment		5
	Step 4	Go Ahead and Implementation: Group Leader		6
	3.3	Risk Assessment		6
	3.3.4	Forms of Risk Assessment		6
	3.3.6	Repeated Events		7
	3.3.8	Residual Risk		7
	3.3.9	Exploratory Visits		7

3.4	Informing Parents and Parental Consent	7
3.5	First Aid Provision	8
3.6	Insurance	8
3.7	Financial Planning	9
3.8	European Package Travel Directive <i>(currently under review)</i>	9
3.9	External Providers/Contractors	9
3.9.3	Public Liability Insurance	10
3.9.4	Disclosure Checks (child protection)	10
3.10	Category 3 and 4 Visits: Special Considerations	10
3.10.2	Swimming In The Sea Or Other Natural Waters	11
3.10.4	Farm Visits	11
3.11	Visits Involving Adventurous or Outdoor Activities	12
3.11.1	Remote Locations	12
3.11.2	External Providers of Adventurous or Outdoor Activities	12
3.11.3	In-house Provision	12
3.11.4	Adventure or Outdoor Activity Equipment	13
3.12	Residential Stays and Overseas Trips	13
3.12.1	Visits Involving Overnight Stays	13
3.13	Visits Outside the UK	14
3.13.1	If Booking Through a Travel Agent or Tour Operator	15
3.13.2	If Organising Your Own Visit	15
3.14	Transport	15
3.14.1	Where Transport is Provided by the Establishment	15
3.14.8	The Maximum Speed of a Council Minibus	16
3.14.15	Breakdowns: Emergency Assistance	17

	3.14.19	Overseas Travel		17
	3.14.21	Driver's Checklist		17
	3.14.22	Where Transport is Contracted to a Coach Hire Company		17
	3.14.24	Supervision of Passengers		18
	3.15	Use of Mobile Phones		18
	3.16	Must Do Summary		18
Chapter	4	Management of Visits	Page	19
	4.3	Accountability With The Council's Services		19
	4.4	Roles and Responsibilities at Establishment Level		19
	4.4.4	Delegated Member of Staff		20
	4.4.5	Group Leader		20
	4.4.8	Leaders		21
	4.4.11	Base Contact Person		21
	4.4.12	Youngsters/Young People		22
	4.4.13	Parents/Carers		22
	4.5	Changes of Plan (Plan B and Plan C)		22
	4.6	Competence of Staff		23
	4.7	Supervision		23
	4.7.2	Gender Balance		23
	4.7.3	Supervision Ratios		23
	4.7.4	Technical Qualifications		24
	4.7.5	Larger Parties		24
	4.7.6	Buddy Systems		24
	4.7.7	Group Management		24
	4.7.10	Levels of Supervision		25
	4.7.11	Remote Supervision		25
	4.7.13	Additional Support Needs		25

	4.7.17	Staff Fatigue		26
	4.7.20	Child Protection		26
	4.8	Must Do Summary		26
Chapter	5	Response To Emergencies	Page	27
	5.2	External Providers		27
	5.3	Planning for Emergency Situations		27
	5.3.3	Emergency Action Card		27
	5.3.6	If Base Contact Cannot be Contacted		28
	5.3.7	Preparation of Plans – Establishment and Area		28
	5.3.10	When a Group is Overdue the Scheduled Return Time		28
		Table of Action and Response for Overdue Group		28
		Emergency Response Flow Chart		29
	5.4	Investigation of Incidents		30
	5.4.3	Investigation Does Not Automatically Imply Incompetence or Negligence		30
	5.4.5	Near Misses		30
	5.5	Must Do Summary		31
		GLOSSARY		32

LIST OF APPENDICES

Appendix 1	Blank Educational Visit Risk Assessment Form
Appendix 2	Sample Risk Assessment
Appendix 3	Generic Checklist for Planning Visits
Appendix 4	Checklist for Group Leaders of Category 2 Visits
Appendix 5	Checklist for Group Leaders of Category 3 & 4 Visits
Appendix 6	Flowchart of Visits Approval
Appendix 7	Initial Approval Form
Appendix 8	Application for approval for Category 3 or 4 Educational Visits (EV1 Form)
Appendix 9	Parental Agreement for Educational Visits (PC Form)
Appendix 10	Information for Parents/Carers
Appendix 11	Parental Information for Educational visit (PI Form)
Appendix 12	Request for School to Administer Medication
Appendix 13	Request for Medication to be Self Administered
Appendix 14	Non-prescribed Medication
Appendix 15	Record of Prescribed Medication Administered
Appendix 16	Record of Non-prescribed Medication Administered
Appendix 17a	Financial Records Exemplar
Appendix 17b	Accounting Records
Appendix 18	External Providers/Contractors Checklist
Appendix 19	Qualifications Matrix
Appendix 20	Personal Protective Equipment at Work Regulations 1992
Appendix 21	European Health Insurance Card (EHIC)
Appendix 22	Minibus Checklist for Overseas Visits
Appendix 23	Minibus Good Practice Guide
Appendix 24	Information for Base Contact Person
Appendix 25	Emergency Action Card – Group Leader
Appendix 26	Useful Contacts
Appendix 27	Further Guidance

Chapter 1: INTRODUCTION

1.1 This document should be seen as an important source of information and made readily available to all those involved in the management, planning and supervision of educational visits under the auspices of Midlothian Council's Education and Children's Services Division. The Council recognises the benefits of well planned visits and visits that provide learning opportunities outside the normal confines of the establishment and will support those valued activities that are promoted by its establishments and services. For ease of use, a glossary can be found at the end of the document.

1.2 Much of what follows is guidance on best practice and draws heavily on the Scottish Executive's Document "Health and Safety on Educational Excursions" (HASEE) published in December 2004.
<http://www.scotland.gov.uk/library5/education/hsee-00.asp>

1.3 This document aligns with Midlothian Council's policy document, ' **Health and Safety in Off-site Excursions**' and outlines various rules and procedures that MUST be followed by staff.

Midlothian Council's Education and Children's Services Division is a Licensed Provider of Adventure Activities under the **Adventure Activities Licensing Regulations 2004**. This document contains rules and procedures to which the Education and Children's Services Division has a legal obligation under these regulations. It also takes into account specific duties arising from the **Disability Discrimination Act 1995** which states that it is illegal for establishments to discriminate against people for a reason related to their disability.

1.4 *"No amount of planning can guarantee that an excursion will be totally incident free, but good planning and attention to safety measures can reduce the number of accidents and lessen the seriousness of those that do happen."*
HASEE, December 2004

1.5 MUST DO SUMMARY

At the end of each chapter is a summary of procedures that need to be seen as **RULES** rather than guidance to good practice. These rules must be followed in order that visits conform to Midlothian Council's Health and Safety Policy to which the Council has a legal obligation.

1.6 There are particular requirements for visits involving **adventurous and outdoor activities, use of remote locations, residential stays and overseas travel** that are all dealt with in this document. There are currently no Midlothian Guidelines covering Twinning and exchange visits however leaders planning such visits will find the Guidelines for Good Practice developed by child safety experts across Europe invaluable and can access them at:
http://www.ec.europa.eu/youth/pdf/doc1242_en.pdf

1.7 DEFINITIONS AND CATEGORIES OF VISITS

For the purposes of this document an educational visit is defined as: *Any organised event where children/young people are taken away from their establishment and, by being so, are removed from the normal day to day safety management arrangements that are in place at the establishment.*

All of the examples below would be regarded as educational visits. They differ only in the level and extent of the planning and organisation required to manage them appropriately:

- Core curricular work such as field work or visits to historical sites
- Engaging with stimulating environments for art work or creative writing
- Subject enrichment such as theatre visits, concerts and museum visits
- Outdoor learning programmes (e.g. *natural connections*)
- Taking part in or watching sporting fixtures or other competitions
- Cultural visits or exchanges
- Residential stays
- Visits to countries outside the UK
- Outdoor Adventurous activities
- Expeditions

1.8 CATEGORIES OF VISIT:

Midlothian Council recognises **FOUR** specific categories of visit:

Category 1	Curricular-related local visits or activities (almost certainly on foot) which take place entirely within the school day
Examples	Visits to local park, wood, pond, swimming pool, high school
Category 2	Simple curricular or extra-curricular visits NOT involving anything in Category 3 or 4 (may or may not use transport)
Examples	Theatre visits, zoo visits, historical visits, sporting visits, inter-school sports, after school clubs (away from base), cinema visits, Time Capsule etc.
Category 3	Visits entirely within the UK that involve any or all of the following:
	<ul style="list-style-type: none"> • Residential stays • Visits to remote locations • Adventurous or outdoor activities
Examples	<ul style="list-style-type: none"> • Outdoor Centres, hotels, hostels, camping • Coastal visits, remote forests or moorland • Canoeing, rock climbing, biking, orienteering, skiing, etc
Category 4	Visits outside the UK
Examples	France, Spain, Germany, Italy, USA, Chile, Morocco, etc

1.9 **All trips and visits** must be officially sanctioned by the Head of Establishment and organised according to the guidance within this document. Any '**unauthorised trips**' will not be covered by the Council's insurers and are not supported by Midlothian Council.

Chapter 2: PRINCIPLES OF SAFETY MANAGEMENT

- 2.1 Safety on visits should not be considered in isolation. It should be seen in the context the Council's broader culture of safety. Staff should be familiar with those aspects of the Council's Health and Safety Policy that are relevant to the content of their planned programme.
- 2.2 **Duty of care** is a legal obligation owed by anyone who takes responsibility for the safety of others. This applies equally to associated aspects of safe practice such as use of minibuses, fire and domestic safety, safety in built-up areas and provision of appropriate insurance. The duty of care owed to someone is heightened if the person is a youngster/young person or has physical or learning difficulties.
- 2.3 Safety has, as its basis a sound framework of planning and organisation, coupled with the competence of those members of staff responsible for delivery and supervision. Competence itself relies upon an appropriate mix of experience, training, common sense and working within known capabilities.
- 2.4 There are a number of **KEY ELEMENTS** that will identify good and safe practice. These are identified below and expanded upon later in the document.
- 2.5 **WELL DEFINED OBJECTIVES**
The objectives for the particular visit and activities **must be** clearly stated and understood by all concerned.
- 2.6 **RISK ASSESSMENT**
A written Risk Assessment **must be** completed prior to each event or series of events. The person(s) carrying out the risk assessment should record it and give copies to all leaders and supervisors with details of the measures they should take to avoid or reduce the risks. (**Appendix 1 and Appendix 2 – Appendix 1 is a blank form and Appendix 2 is a worked example**)
- 2.7 **ADEQUATE SUPERVISION**
Competent leadership is the most important safety factor of all as enthusiasm by itself is generally not enough. Appropriate supervision ratios along with the required competences and experience of leaders should be identified as part of the risk assessment process.
- 2.8 **TRAINING OF STAFF**
Leaders need to be able to safeguard the physical and psychological health of the people, and especially young people, in their care. It is important that staff receives appropriate training for the organisation, leadership and supervision of educational visits and are therefore required to attend courses on:
- Educational Visits Training
 - Training for Visits Abroad
 - Child Protection Training (Level 1)
 - Emergency Aid Training
- Information on all relevant courses can be found on the Outdoor Learning Portal at
<http://outdoorlearning.mgfl.net/publish/index.shtml>

Members of staff who have undergone training in another authority must show evidence of this or re do the training. In addition, Heads of Establishment will require regular update briefings.

2.9 **CLEARLY DEFINED ROLES**

It is essential that all those involved in the planning and delivery of visits understand their roles and responsibilities.

2.10 **GOOD COMMUNICATION**

Effective communication during all stages of the planned visit is crucial. Usually it will be sufficient to communicate verbally but it may be necessary to provide written instruction on occasions. Mobile phones can be of great help and their use should be considered but not totally relied upon. For school pupils, further details of any communication needs may be found in education support plans.

2.11 **PLANNING AND PREPARATION**

All aspects of the proposed visit should be carefully planned. It is strongly recommended that organisers use a form of **Planning Checklist**. An exemplar template is included as **Appendix 3. (Appendix 4 has a checklist for Category 2 Visits and Appendix 5 has a checklist for Category 3 and 4 Visits)**

Consideration must also be given to ensuring that appropriate contingency arrangements are in place.

2.12 **MONITORING**

It is a vital link in the safety management chain that managers satisfy themselves through a monitoring process that the guidance and good practice that is outlined in this document is being implemented 'on the ground'. To this end sample monitoring visits will be undertaken by the Principal Teacher of Outdoor Learning (hereafter referred to as PTOL). As part of this procedure the PTOL will provide termly reports on the number of category 3 and 4 activities approved.

2.13 **EVALUATION AND RETENTION OF DOCUMENTATION**

It is important to evaluate the outcomes of a particular visit in order to learn from the experience. The evaluation process will inform the planning for all future visits.

The reporting of potentially hazardous occurrences allows for the evaluation of trends within the organisation overall as a part of the continuous improvement of best practice. **All documentation pertaining to and following trips, including risk assessments, consent forms, checklists and itineraries and monitoring and evaluation forms should be retained in the school for one academic year.**

Chapter 3: PLANNING VISITS

3.1 Whether a visit is to the local park or a residential overseas trip, it is essential that formal planning takes place and that it begins far enough in advance of departure. This chapter provides guidance on the planning process and a number of related issues that may need to be considered.

3.2 AUTHORISATION

There are **FOUR STEPS** to gaining authorisation for a visit. Flowchart for Approval is in **Appendix 6**

STEP 1 Initial Approval: Head of Establishment.

In the first instance staff planning visits **must** seek authorisation in principle from their Head of Establishment. At this early stage, details may be limited but should include:

- Objectives of the visit
- Likely dates, duration and venue
- Size and make-up of group
- Staffing requirements
- Other resources
- Estimate of costs

A sample Initial Approval Form is included as **Appendix 7**

STEP 2 Detailed Planning and Risk Assessment: Group Leader

The Group Leader, with other staff where appropriate, does the detailed planning, including a daily itinerary of events and carries out a risk assessment for the visit. The risk assessment is recorded. Information about the support requirements of people with additional needs will be useful at this stage.

STEP 3 Authorisation: Head of Establishment (or member of the Management Team)

For Category 1 and 2 Visits: Detailed plans along with the written risk assessment are given to the Head of Establishment, who authorises the visit once he/she is satisfied that all proper measures are in place.

For Category 3 Visits: Form EV1 is completed and 'signed off' by the Head of Establishment prior to sending to the PTOL (or nominated officer). This should happen **at least 28 days prior** to the visit. When satisfied that proper measures are in place and the arrangements conform to the Council's health and safety policy, the PTOL (or nominated officer) makes recommendations (in writing) to the Head of Establishment who authorises the visit on the basis of specialist advice received. If the PTOL (or nominated officer) does NOT recommend the proposed visit and the Head of Establishment still supports the application final authorisation must come from the Director, Education & Children's Services Division. Under no circumstances should visits go ahead without proper authorisation.

For Category 4 Visits: As for Category 3 but EV1 forms will usually require to be submitted **much earlier than 28 days**. The PTOL notifies the Director, Education and Children's Services.

STEP 4 Go ahead and Implementation: Group Leader

Final planning is completed and the visit goes ahead.

Refer to **Appendix 6**: Flowchart for Approving Visits

3.3 RISK ASSESSMENT

3.3.1 On any visit, the safety of participants and employees must be the primary objective. **Participants must not be put into a position that exposes them to an unreasonable level of risk.** A written Risk Assessment **must be** completed prior to each visit or series of visits.

3.3.2 The purpose of a risk assessment is to:-

1. identify the likely hazards to be encountered
2. identify those who are at risk
3. identify how risks can be minimised and managed at an acceptable level by implementing suitable control measures

3.3.3 **The person(s) carrying out the risk assessment should record it and give copies to all leaders and supervisors on the visit and to the Head of Establishment for approval. Risk assessment templates are included as Appendices 1 and 2**

3.3.4 Forms of Risk Assessment

Risk assessments for a visit need not be complex but they should be as comprehensive as possible. Probably the best way to achieve this would be to gather the staff team together to brainstorm a list of potential hazards. From here risks can be identified and appropriate control measures put in place.

Where certain specialised activities throw up particular hazards, the Head of Establishment **must** ensure that the person assessing the risk is competent to do so.

Where people with additional support needs are participating, it is essential that appropriate advice is taken on what reasonable adjustments are required and how they can be made.

3.3.5 There are three common forms of risk assessment:

1. **Generic risk assessment.** These can be useful in identifying generic risks attached to certain activities or visits. For example there are generic risks attached to visiting large cities regardless of whether the city is London, Manchester or Barcelona.
2. **Site-specific risk assessment.** Should be used **in addition to** a generic risk assessment to evaluate risks that are particular to your planned activity or visit.
3. **Dynamic risk assessment.** Whereas generic and site-specific risk assessments are done prior to the visit, a dynamic risk assessment should be a continuous process throughout the visit. They are less likely to be recorded but are a product of continuous monitoring and vigilance by staff and participants. In simple terms dynamic risk assessment is the result of continually asking the question, **"What if.....?"**

3.3.6 Repeated Events

Where a visit is one of a series of similar events (e.g. regular away sports fixtures or a series of programmed sessions at a ski centre) it may not be necessary to carry out written risk assessments for every occasion. Provided that the safety management arrangements do not significantly change and no additional hazards are identified due, for example to changing seasons or other factors, one document would suffice.

3.3.7 Notwithstanding this, it is important not to become complacent and a continual process of dynamic risk assessment should be taking place in order to monitor safety.

3.3.8 Residual Risk

It is inconceivable that all risk will be eliminated from a visit or activity. The risk that remains having carried out a risk assessment and implemented control measures to manage it is called the “**Residual Risk**”. It is important that all those involved, including parents/carers are aware and acknowledge that residual risk exists.

3.3.9 Exploratory visits

Wherever possible the Group Leader should undertake an exploratory visit.

This will not only assist in carrying out a more comprehensive and meaningful risk assessment, but should ascertain the suitability of the venue/area for meeting the visit’s objectives and the needs of people with additional support needs. It will enable staff to better orientate themselves prior to taking the group.

3.3.10 If an exploratory visit is not possible then other sources of information must be sought in order to effectively assess risks. These might include:-

- other organisations who have used the same venue
- tourist authorities
- management of the venue
- the venue’s own safety policy, risk assessment and operating procedures.

3.4 INFORMING PARENTS AND PARENTAL CONSENT

3.4.1 Except where visits are local and Category 1, take place entirely within the school day and are provided for pupils at no charge (Ref 3.5.3 below), the written consent of parents/carers for their child to take part in visits must always be obtained. **PC Form should be used for Category 2, 3 and 4 Visits (Appendix 9)**

3.4.2 It is imperative that parents/carers are sent, along with a consent form, detailed information about planned visits as early as possible in the planning process. The information provided must be sufficient to enable parents to make an informed decision about their child’s participation. A summary of essential information to be provided can be found in **Appendix 10 and in PI Form (Appendix 11)**

3.4.3 It is usual that establishments might anticipate a number of trips or visits during the course of a school year. Provided the visits are local, take place within the normal school day and are closely connected to normal school activity, it is acceptable to gain blanket consent from parents for a period of up to one academic year.

3.5 FIRST AID PROVISION

- 3.5.1 As a general principle, young people should have access to appropriate First Aid assistance depending on the nature of the visit and as informed by the risk assessment.
- 3.5.2 As a minimum, **at least one leader trained in Emergency Aid must accompany every visit** and where separate sub-groups of young people will be created during the course of a visit, each must have a similarly trained leader. Consideration needs to be given to the need for more comprehensive first aid training when supervising adventurous and outdoor activities and particularly in remote environments.
- 3.5.3 A travelling First Aid Kit should be taken and be readily accessible throughout the visit. Leaders should be aware of the contents of the First Aid Kit and know how to use it.
- 3.5.4 The Group Leader should be aware and have taken account of any existing medical conditions and/or special needs that group members may have. This information will normally be sought on the parental consent form (PC Form).
- 3.5.5 Group Leaders must carry clear written instructions relating to the administering of any medication required to party members. Reference should be made to Policy Guidelines Pupil Welfare 2.5: Administration of Medication in School (April 1999) and for residential visits to **Appendices 12 and 13 (prescribed medicines) and Appendix 14 (non-prescribed medicines)**.
For residential visits, **especially visits abroad**, young people often bring along non-prescribed medication for dealing with situations which may arise. In some instances it may make the distribution of non-prescribed medication easier if it dealt with centrally by the accompanying staff i.e. medication is bought and kept centrally. **Appendix 14** is an exemplar which could be given to parents and discussed at parents' nights. This list would be most suitable for young people of high school age – a reduced list could be used for youngsters of primary school age.
- 3.5.6 Where first aid has been administered, normal recording and reporting procedures must be followed. **Appendix 15 (prescribed medication) and Appendix 16 (non-prescribed medication)**

3.6 INSURANCE

- 3.6.1 The Council's Public Liability policy will cover any injury or loss incurred by individuals due to the negligence of the Council or its employees (including volunteers who are working under the instructions of the Council).
- 3.6.2 The Council also has travel insurance cover for all **approved** educational visits (from schools or agencies working with pupils registered at a school – this cover does **not include** visits organised by Community Learning and Development).
- 3.6.3 Details of cover can be found in **Management Circular 76, January 2007**.
- 3.6.4 Parents/carers of young people going on an overseas visit should be given a copy of the Summary of Insurance Cover. If parents/carers are not satisfied with the amount of cover on offer, they should take out their own insurance cover.
- 3.6.5 Further information about insurance issues can be sought from the Council's Insurance Officer (**Appendix 26**).

3.7 FINANCIAL PLANNING

- 3.7.1 The Group Leader should ensure that parents have early written information about:
- the costs of the visit
 - what proportion of the overall cost they will be expected to pay
 - the timetable for payments
 - the banking and accounting arrangements

3.7.2 Financial accounting procedures should be agreed with the Head of Establishment and in line with Council and establishment policy. They should be available for inspection by parents/carers on request. Sample Financial Records forms are included as **Appendices 17a and 17b**.

3.7.3 Establishments need to consider how it will fund any additional cost (e.g. extra staffing) that may arise from the inclusion of participants with additional support needs.

3.8 EUROPEAN PACKAGE TRAVEL DIRECTIVE (CURRENTLY UNDER REVIEW)

This directive was introduced primarily to protect consumers who pay monies up front for package travel from the risk of tour operators becoming insolvent. If your visit is of more than 24 hours duration and includes the provision of transportation and accommodation in exchange for payment then the directive applies. The Group Leader and establishment then becomes the Tour Operator and are bound by the Regulations.

3.8.1 If your visit has been booked through a tour operator or travel agent then these agencies should conform to the Regulations and provide the appropriate protection.

This protection can, under the Regulations, be provided in one of three ways:-

1. Bonding: e.g. ABTA
2. Insurance
3. Trust funds.

3.8.2 If Group Leaders are making travel arrangements themselves on behalf of the group then care must be taken to ensure that arrangements comply with the directive.

3.8.3 Using low budget airlines is a good method of reducing costs for travel overseas. Group Leaders should be aware, however, of the consequences of cancelled or delayed flights. In conjunction with Heads of Establishments and parents/carers of young people travelling, contingency plans and funds should be arranged to cover such eventualities.

3.9 EXTERNAL PROVIDERS/CONTRACTORS

3.9.1 Where elements of the planned visit are contracted out to one or more external provider, and where the provider accepts a duty of care for group members, the Group Leader **must** satisfy him/herself that the provider:-

- is reputable
- has carried out a satisfactory risk assessment.
- has competent staff
- has appropriate public liability insurance (see below)
- has complied with child protection requirements (see below)
- is able to accommodate any additional support needs of group members.

NB. There are additional requirements placed upon providers of **adventurous and outdoor activities, residential facilities** and **overseas travel**. These are dealt with separately in the next section.

- 3.9.2 A checklist for External Contractors/Providers is in **Appendix 18**. Once forms have been completed and returned **please send a copy to the PTOL**. This will reduce duplication of effort.

Group Leaders who wish to hire transport (coaches etc.) should firstly contact the Travel Team who will tender for contracts on behalf of groups to ensure best value and ensure that any external contractor meets the minimum requirements of the Council. (see 3.14.22)

3.9.3 **Public liability insurance**

It is a Council requirement that any company or other external organisation to which services on visits are contracted must provide proof of current public liability insurance cover with an indemnity limit of a minimum of **Five Million Pounds (£5m)**.

3.9.4 **Disclosure Checks (Child protection)**

External providers who accept a duty of care for young people should be required to sign a declaration confirming that all of their staff who will have access to participants have been disclosure checked at an enhanced level.

3.10 **CATEGORY 3 and 4 VISITS: SPECIAL CONSIDERATIONS**

3.10.1 **Coastal Visits**

Many of the incidents affecting pupils have occurred by or in the sea and there are dangers on the coast quite apart from those incurred in swimming. The Group Leader will want to bear the following points in mind when assessing the risks of a coastal activity:

- tides, rip tides and sandbanks are potential hazards; timings and exit routes should be checked
- group members should be aware of warning signs and flags
- establish a base on the beach to which members of the group may return if separated
- look out for hazards such as glass, barbed wire and sewage outflows etc
- some of a group's time on a beach may be recreational. Group Leaders should consider which areas of the terrain are out of bounds, and whether the risk assessment allows swimming in the sea
- cliff tops can be highly dangerous for groups of young people even during daylight. The group should keep to a safe distance from the cliff edge at all times - a "buffer zone" between the participants and the hazard. Be aware that cliff falls can mean that cliff paths stop abruptly at the cliff edge
- group leaders should not normally allow participants to ride mountain bikes on any route that is near a sheer drop e.g. coastal path or canal towpath. If the risk assessment indicates that the risk could be managed adequately, then there should be a small known group of skilled and experienced riders accompanied by appropriately qualified staff
- the local coastguard, harbour master, lifeguard, local authority adviser, countryside ranger or tourist information office can provide information and advice on the nature and location of hazards

3.10.2 **Swimming In The Sea Or Other Natural Waters.**

Swimming and paddling or otherwise entering the waters of river, canal, sea or loch should never be allowed as an impromptu activity. In-water activities should take place only when a proper risk assessment has been completed and proper measures put in place to control the risks.

3.10.3 Any planned swimming activity that takes place in areas that are **NOT** specifically designated for bathing and do not have lifeguard surveillance in place should be regarded as an **Adventurous Activity** and should be pre-notified using Form EV1.

3.10.4 **Farm visits**

All educational farm visits should be arranged through the Royal Highland Education Trust (RHET). Groups wishing to arrange alternative visits should discuss plans with the PTOL at least 28 days in advance of the planned visit.

Visits to working farms can be valuable experiences for young people but potentially have special risks associated with farm machinery, physical contact from animals, infection, food and chemical poisoning.

3.10.5 Group Leaders should ensure that:

- eating areas are separate from those where there is any contact with animals
- there are adequate clean and well-maintained washing facilities
- there is clear information for visitors on the risks and the precautions to take
- there is adequate trained adult supervision wherever children can come into contact with animals and need to wash their hands
- all children wash their hands thoroughly immediately after touching animals and before any eating or drinking
- shoes are cleaned and then hands are washed on leaving the farm

3.10.6 Never let participants:

- place their faces against the animals
- put their hands in their own mouths after touching or feeding the animals
- eat or drink while going round the farm
- eat or drink until they have washed their hands
- sample any animal foodstuffs
- drink from farm taps (other than in designated public facilities)
- touch animal droppings - if they do then wash and dry hands
- ride on tractors or other machines
- play in the farm area, or in other areas that are out of bounds such as grain storage tanks, slurry pits etc.

3.10.7 Consider suggested supervision levels of:

- individual supervision by an adult for every child younger than 12 months
- a supervision ratio of one adult for two children for children between ages one and two
- gradually increasing ratios up to one adult for eight children for children between ages five and eight

Further guidance is in **Appendix 27**

3.11 VISITS INVOLVING ADVENTUROUS OR OUTDOOR ACTIVITIES

These activities may be defined as:-

Activities in which the level of perceived risk exceeds that of normal daily living and where specific safety measures involving specially trained staff and specialist equipment are required in order to reduce risks to an acceptable level.

An activity may be deemed 'adventurous' by the nature of the location in which it happens as well as by the activity itself. For general guidance, if the planned activity would, by its nature or location require staff with specialist training and/or qualifications to supervise it, then it should be regarded as an adventurous activity.

3.11.1 Remote Locations:

An activity that may not normally by its nature be defined 'adventurous' is deemed to be so if it takes place in a location that is remote from immediate assistance. e.g. some coastal walks or field work in a remote area of woodland.

For general guidance, if the location of activities is likely to involve **being more than 30 minutes walking time from a public road or vehicle access point**, it should be regarded as remote.

All such activities must be separately notified using form EV1. Where any doubt exists about whether to notify, advice should be sought from the PTOL or an EV1 form should be submitted regardless.

3.11.2 External Providers of Adventurous or Outdoor Activities:

Where an Outdoor Centre or other organisation are contracted to supply elements of an Outdoor Education/Learning programme, the Group Leader must ensure that in addition to the requirements in 3.41:-

EITHER: the provider is appropriately licensed by the Adventure Activities Licensing Service (AALS) for the activities they plan to provide. The status of all licensed providers can be checked at <http://www.hse.gov.uk/aala/index.htm> or www.aala.org

OR: the provider, if unlicensed, will only offer activities that fall out of scope of the Adventure Activities Licensing Regulations and that they have an appropriately robust safety management system.

It is strongly recommended that at an early stage Group Leaders discuss their plans to use any licensed or unlicensed providers with the PTOL, who will be able to give guidance and advice.

3.11.3 In-house Provision:

All adventurous or outdoor activities **MUST** be staffed by people who are appropriately qualified to lead them and within the prescribed supervision ratios as outlined in 4.7.3. The **qualifications matrix** in **Appendix 19** provides guidance on the appropriate form of qualification for the more common adventurous activities. All National Governing Body (NGB) awards must be kept valid and current according to the requirements of the NGB concerned.

Where there is doubt about the appropriate qualification to supervise an activity, advice should be sought from the PTOL.

3.11.4 **Adventure or Outdoor Activity Equipment:**

Where stocks of adventure or outdoor activity equipment are held in establishments, the Head of Establishment must ensure that:-

- It is stored securely with restricted access so that only appropriately qualified people can access technical equipment
- It is stored according to the manufacturer's recommendations.

Personal Protective Equipment (PPE) is tested and checked according to PPE regulations. **(Appendix 20)**

- All technical equipment is visually checked by an appropriately trained person prior to every use and is inspected at least annually by a Technical Advisor who will submit a report on its condition along with recommendations.
- Worn or damaged equipment is quarantined for repair or discarded.
- All tests and periodic checks on items of equipment are separately recorded including details of when each item was introduced into stock.

Further advice on the storage of specialist equipment may be sought from the PTOL.

3.12 **RESIDENTIAL STAYS AND OVERSEAS TRIPS:**

Where an educational visit involves one or more overnight stays, the rules and guidance in the next section must be taken into account. There are particular difficulties in reliably assessing the safety management standards of overseas providers and it is strongly recommended that Group Leaders seek advice at an early stage from the PTOL.

3.12.1 **Visits Involving Overnight Stays.**

Residential stays put additional demands upon staff in both the planning and supervision of visits.

3.12.2 At the planning stage Group Leaders must ensure that:

- staffing ratios and supervision rotas allow for effective supervision 24 hours per day and have built-in flexibility in the event of a participant requiring a high level of supervision
- for mixed gender groups there are **both male and female leaders** (It is recognised that for some primary schools this can prove problematic. Exceptions will be allowed up to P7 level) and that the accommodation provides separate male and female sleeping/bathroom facilities the group will have exclusive use of the immediate accommodation allocated to them
- staff accommodation (at least those on duty) is adjacent to the group's accommodation
- the accommodation has adequate security measures in place. Group accommodation should be lockable but leaders must have access at all times
- The organisation that owns or manages the accommodation has checked all staff who work there for their suitability to work with young people
- The accommodation complies with local fire regulations and that adequate fire alarm and evacuation procedures are in place, taking account of any participants with additional support needs
- The accommodation is able to cater for participants with additional support needs including disabled access, and dietary, cultural or religious requirements
- Measures are in place to provide first aid and for the seeking of outside medical help

3.12.3 Early in the visit the Group Leader must:

- Orientate children/young people to the accommodation layout
- Brief children/young people on the fire alarm, evacuation procedures and muster stations in the event of a fire. If a fire drill is not undertaken for all people in the building, leaders should simulate a fire drill with their entire party before bedtime on the day of arrival
- Ensure that children/young people are briefed on what's expected of them, any rules that are to be imposed and the mutual responsibilities everyone has in regard to communal living

3.13 VISITS OUTSIDE THE UK

Since it is usually implicit that visits overseas will have a residential element, it should be assumed that all of the above applies. In addition, Group Leaders should give further consideration to the following:

- **Staffing ratios:** are there particular supervision issues relating to being abroad that will require more favourable ratios?
- **Language differences:** participants should be encouraged to communicate and consideration should be given to providing participants with some common words and phrases. At least one of the leaders should be reasonably fluent in the local language
- **Cultural differences:** participants should be briefed about local conventions, codes of conduct, laws, dress codes and attitudes to gender
- **Food and drink:** any dangers attached to local foods or drinking water
- **Urban safety and security:** some towns and cities may be intrinsically more dangerous than participant's home environment and a careful briefing would be required
- **Wildlife:** In the UK we are not used to wildlife that presents a real threat to life. This may not be the case overseas
- **Currency:** provide advice on security, exchange rates and forms in which to carry money
- **Vaccination:** establish whether vaccinations are required in the countries to be visited and ensure these are carried out in good time. Guidance can be sought from the publication: '*Health Advice for Travellers anywhere in the World*' available at Post Offices
- **Travel Insurance:** all group members must have travel insurance that includes medical treatment abroad, repatriation, cancellation/curtailment and legal assistance in recovery of claims. **The Council has such insurance in place. All parents/carers of young people going on a visit abroad should be given a copy of the summary of the insurance provided.** If parents/carers think that the insurance cover is insufficient they should arrange alternative cover
- **Visas/Passports:** ensure that all participants have valid passports and visas if required at an early stage in planning. It is recommended that the Group Leader retains a photocopy of passports/visas for emergency use
- **Medical help:** For travel in the EU, participants should carry an EHIC card, available from Post Offices and completed by their parent/carer. This is a card of entitlement to free or reduced cost treatment. It is still advisable to have a substantial contingency fund available to pay for treatment if required. Payment can be reclaimed later through travel insurance. Assistance on how to obtain an EHIC can be found in **Appendix 21**
- **Emergencies:** Group Leaders should know how to contact the nearest British Embassy or Consulate. They should know how to contact the emergency services

- **Climate:** Group Leaders need to be fully aware of additional precautions required. These could include sun screening, monitoring fluid intake to prevent dehydration, or additional clothing for extreme cold
- **Code of Conduct:** It is strongly advised that a Code of Conduct is drawn up for each visit and is signed by the pupil and parent/carer. Exemplars are included in Training for Visits Abroad
- **Mobile Phones:** The taking and/or use of mobile phones should be part of the risk assessment process and will be determined by the ages of participants, activities, etc. Phones with cameras should have conditions of use, for example, not in private areas like bedrooms or changing areas

3.13.1 If booking through a travel agent or tour operator:

- ensure that they are appropriately bonded providing security against insolvency. The form of bonding should be approved by the Department of Trade and Industry
- ensure that, where air travel is involved, the tour operator is ATOL Licensed

3.13.2 If organising your own visit:

- ensure that you comply with the European Package Travel Directive
- ensure contingency plans are in place when using budget airlines
- special regulations apply to taking minibuses abroad and advice should be sought from the Travel Team

3.14 TRANSPORT

The first port of call for hiring vehicles is the **Travel Team** (see 3.9.2 and 3.14.22). Refer also to Policy Guidelines Health & Safety 5.4: *Operation of Minibuses* (April 1999)

3.14.1 WHERE TRANSPORT IS PROVIDED BY THE ESTABLISHMENT.

Transport is likely to be by Council-owned minibus or in one or more member of staff's own private car.

Where a private car is used to transport youngsters/young people, staff should ensure that appropriate insurance cover is in place.

New regulations on seat belts and child restraints came into force on 18 September 2006. Link below

<http://www.thinkroadsafety.gov.uk/campaigns/childcarseats/childcarseats.htm>

- 3.14.2 Only persons in possession of a MiDAS permit are permitted to drive minibuses when carrying passengers on Council business. These permits, which are transferable between local authorities, must be renewed every 4 years. Staff/volunteers wishing to apply for a MiDAS test should contact the **Travel Team**. **(Appendix 26)**

- 3.14.3 The Head of Establishment must ensure that all those driving vehicles on Council business must hold the relevant, valid licence, together with the appropriate insurance. If using their own vehicle, staff should seek the advice of their insurer, informing them of the activities they are required to undertake for Midlothian Council.

- 3.14.4 **Only staff with D1 on their driving licence can drive a Council minibus (D1 is on all driving licences of people who passed their driving test before 01 January 1997).** Staff without D1 on their licence will have to undergo further training to obtain D1 (PCV Training). Further information can be obtained from the **Travel Team. (Appendix 26)**
- 3.14.5 Volunteers who gain no reward for driving duties can, in special circumstances, drive Council minibuses if they have a current MiDAS certificate. **Midlothian Council employees cannot, in any circumstance, be regarded as volunteers.** (Please see 3.14.4)
- 3.14.6 Regardless of other responsibilities and status, responsibility for the conduct of passengers and the safety and integrity of any load, both carried or towed, lies with the driver of the vehicle.
- Drivers are expected to:
- inspect the vehicle before use
 - never use a faulty vehicle. Use an alternative vehicle or make alternative arrangements if a fault is found
 - report all faults on Midlothian vehicles
 - follow the relevant road traffic legislation
 - take careful account of weather and road conditions. On no account should drivers place themselves or passengers at unnecessary risk
 - follow good practice **(Appendix 23)**
- 3.14.7 Log sheets must be completed for all journeys in Council minibuses. Heads of Establishments should ensure that a system is in place for checking these.
- 3.14.8 **The maximum speed of a Council minibus on journeys is 80kph (50mph), except on dual carriageways and motorways where the maximum speed is 100kph (60mph)**
- 3.14.9 All passengers should have a forward or rearward facing seat and all seats should be fitted with approved seatbelts. It is the driver's responsibility to ensure that seat belts are worn.
- 3.14.10 For participants with additional support needs, the establishment must ensure that transport arrangements are appropriate and, where necessary, an escort (passenger assistant) is provided.
- 3.14.11 On long journeys due consideration must be given to driver hours required and the length of the driver's day. The limitations imposed by the European Work Time Directive should be taken into account.
- It should be recognised that **driver fatigue** is a very high contributory factor to road traffic accidents and this should be taken account of as part of the risk assessment process. It is almost always desirable to delegate responsibility for the supervision of passengers to a second adult in the vehicle.
- 3.14.12 Luggage should be carried so as not to obstruct aisles or exits. **There are specific rules related to towing trailers with minibuses.** Good advice can be obtained from the Community Transport Association or from the **Travel Team. (Appendix 26)**

- 3.14.13 When setting down pupils from a minibus the vehicle exit door should be kerbside, so that passengers do not have to enter the carriageway.
- 3.14.14 Vehicles should, where possible, be parked on the same side of the carriageway as the activity to minimise the need for persons to cross the carriageway.
- 3.14.15 **Breakdowns: Emergency Assistance**
All Council operated vehicles should carry an AA Fleet Rescue Card in a pouch fitted to the windscreen.
- 3.14.16 For breakdowns outwith Midlothian and/or outwith normal working hours contact AA Fleet Rescue
- 3.14.17 For breakdowns within the boundaries of Midlothian and within normal working hours (8.30 am – 4.30 pm Monday - Friday) contact **Vehicle Maintenance Services (Appendix 26)**
- 3.14.18 In the event of a breakdown, accident or other major delay the driver must inform the establishment or the emergency Base Contact (out of 'normal' hours) of any delay. Steps should also be taken to ensure the safety of the passengers by evacuating the vehicle if it is stopped in a dangerous place;
- 3.14.19 **Overseas Travel**
When it is proposed to take a Council minibus abroad, **a full PCV licence is required**. Full details of the proposed itinerary, dates of travel etc must be submitted in writing to the **Travel Team** not less than 8 weeks before the journey.
- Commercial Services will arrange for all relevant documentation and for the minibus to receive a 'Continental Service' prior to departure.
 - The establishment will be responsible for arranging its own foreign breakdown insurance.
- 3.14.20 Minibus Checklist for Overseas Visits is in **Appendix 22**.
- 3.14.21 **Drivers Checklist:**
- PCV Licence
 - Full, clean driving licence
 - Letter of authorisation from Midlothian Council
 - Proof of "in-house" training and driving test
- 3.14.22 **Where transport is contracted to a coach hire company**
Group Leaders are required to check with the Travel Team to ensure that the Coach Hire Company is approved for Education and Children's Services use.
This includes travel overseas where the tour operator may sub-contract the coach hire.
- 3.14.23 Group Leaders should ensure that for long journeys, particularly to mainland Europe or beyond, that there are sufficient drivers available to prevent driver hours being exceeded. Drivers on 'down time' should be encouraged to get proper rest and NOT fulfil the role of co-driver that requires them to remain alert.

3.14.24 **Supervision of passengers**

Whilst it is the driver that can be held accountable for unruly behaviour on his/her bus it should NOT be left to the driver to impose the discipline required to maintain acceptable behaviour. In practice it is not possible to supervise young passengers and concentrate on driving at the same time. Responsibility for the conduct of passengers needs to be accepted by the Group Leader. This also implies that where establishments provide their own transport, there should usually be another adult aboard in addition to the driver **especially on long journeys (one hour or more)**.

Where youngsters/young people have additional support needs it is important to refer to any support plans they may have to check on particular access requirements.

3.15 **USE OF MOBILE PHONES**

The taking and/or use of mobile phones should be part of the risk assessment process and will be determined by the ages of participants, activities, etc. Phones with cameras **MUST** have conditions of use, for example, not to be used in private areas like bedrooms or changing areas

3.16 **MUST DO SUMMARY:**

1. **Obtain authorisation from the Head of Establishment for the visit**
2. **Prepare a written risk assessment for all aspects of the visit**
3. **Inform parents/carers and obtain their written consent**
4. **Take account of any special needs, medical or dietary issues**
5. **Ensure all volunteer staff have been Disclosure Scotland checked**
6. **Ensure First Aid provision is in place**
7. **Ensure transport arrangements conform to Council policy**
8. **Give special consideration to residential visits and visits abroad**

Chapter 4: MANAGEMENT OF VISITS

4.1 This chapter considers the administrative and managerial requirements for the organisation and management of visits. It identifies a number of **Key Individuals** that will have a role in most visits. Depending on the size of the visit and/or size of the establishment, several of the **key roles** may be carried out by a single **key individual**

4.2 It is essential that all those involved understand their responsibilities and that there are clear channels of communication through the management system, from policy makers to participants and parents/carers.

4.3 ACCOUNTABILITY WITHIN THE COUNCIL'S SERVICES

4.3.1 Director, Education and Children's Services

The Director, Education and Children's Services has responsibility for all matters of safety within the Education and Children's Services Division including educational visits and for ensuring that appropriate policies are provided and effectively communicated to Schools Group Managers, Education Officers, Managers and Heads of Establishments.

4.3.2 Schools Group Managers, Education Officers, Managers & Heads of Service

Schools Group Managers, Education Officers or central management have the responsibility for communicating policies to establishments and for providing support to Heads of Establishments in the implementation of these policies. They have no direct role in the provision of visits but are responsible to the Directorate for a general oversight of good practice and application of Council policies. They need to be aware of the legal implications for themselves and for the Council in the management of visits.

4.4 ROLES AND RESPONSIBILITIES AT ESTABLISHMENT LEVEL

4.4.1 Head of Establishment

Throughout this document reference is made to the "**Head of Establishment**". In the context of the document the designation is not confined to the managers of facilities such as Schools or Community Learning and Development Centres, but could extend to the managers of outreach services and other non-building based projects. He/she is the individual who carries direct responsibility for authorising the planned activity or event.

4.4.2 The Head of Establishment has responsibility for ensuring safe practice and for the implementation of the Council's health and safety policy. Special care should be taken to ensure that:

- The proposed event has appropriate, achievable and well defined aims
- All employees and volunteers are competent and have appropriate experience and training
- Group Leaders are allowed sufficient time to organise visits properly
- Party size, group size and ratios of staff/volunteers to youngsters/young people conform to the guidelines
- Appropriate information is provided to youngsters/young people and parents/carers
- Parental consents are sought and received
- A risk assessment has been carried out

- Transport arrangements are appropriate and conform to Council policy
 - Child protection procedures are in place and will be followed
 - Contingency arrangements are in place
 - The financial and insurance arrangements are adequate
 - The particular requirements of those with additional support needs are considered, including arrangements for medication
 - Adequate first aid arrangements will be in place
 - A **Group Leader** has been designated for the visit and he/she has a clear understanding of his/her roles and responsibilities
 - A **Base Contact Person** is appointed and identified to the Group Leader and to parents/carers
 - Contact arrangements are sufficient for all eventualities and will enable a co-ordinated response to any incident that may occur
 - Staff and volunteers involved understand their respective roles and responsibilities
 - 'Checking out' and 'Checking in' procedures at the beginning and end of the activity/visit are in place
- 4.4.3 In all cases the responsibility to approve each visit rests with the Head of Establishment. The role of the PTOL is to provide specialist advice on category 3 and 4 visits. If the PTOL and the Head of Establishment cannot agree on aspects of a proposed trip final approval must be from the Director of Education and Children's Services.
- 4.4.4 **Delegated Member of staff**
Some or all of the above responsibilities may be delegated to other appropriate staff in an establishment. In such cases the responsibilities must be clearly stated and understood by all concerned. The responsibility for the visit remains with the Head of Establishment.
- 4.4.5 **Group Leader**
The Group Leader is the person in whom the Head of Establishment has placed responsibility for the safe conduct of visits and activities. Some appropriate share of these responsibilities is assumed by others who may be colleagues from the establishment or staff from other agencies.
- 4.4.6 The Group Leader has overall responsibility for the safety of individuals and the group at all times. In particular he/she will be responsible for:
- Ensuring the implementation of the Council's Educational Visits policy
 - Ensuring that all participants in their care are adequately briefed
 - Ensuring that all participants are suitably prepared and equipped
 - Effective liaison with other staff involved in the programme
 - Ensuring that the Base Contact Person has all the information they require to fulfil their role
 - Taking account of any additional support needs
 - Making arrangements for any medical or dietary requirements
 - Ensuring there is adequate First Aid provision
 - Ensuring a risk assessment has been carried out and that other staff are appropriately informed
 - Abandoning or curtailing the visit or activities if, in his/her judgement the health and safety of participants is unacceptably compromised
 - Briefing and giving appropriate information to the Base Contact person

4.4. **The nominated Group Leader will often be the most experienced member of the staff team and should retain overall control of the visit regardless of his/her status within the day to day management structure of the establishment.**

4.4. **Leaders**

Other adults accompanying visits and who are given supervisory responsibility, whether paid or voluntary, act as employees of the Council.

Supervisory staff should:

- assist and support the Group Leader in carrying out his/her responsibilities and respect the fact that final responsibility for decision making during the visit lies with the Group Leader
- Take responsibility for the safety and well-being of participants as delegated by the Group Leader
- Consider stopping the activity or visit and notifying the Group Leader if they believe the health and safety of those in their care is compromised

4.4.9 Specialist staff may be involved to provide instruction or coaching in activities. Such staff may be the Group Leader, other members of staff/volunteers or appointed specialists.

They have responsibility to ensure that:

- All equipment is checked for suitability and safe condition
- They operate within the Council's health and safety policy
- Where appropriate they adhere to other relevant codes of practice
- They act within the scope of their experience and training
- They are appropriately insured
- Acceptable supervision ratios are maintained

4.4.10 Specialist staff working for contracted external providers have similar responsibilities but must work within the scope of their employer's safety management arrangements and within the contractual arrangements between the Council and the provider.

4.4.11 **Base Contact Person**

This person has a crucial role in the safety management system and will normally be a senior member of staff. The designated person should be appointed by the Head of Establishment and will remain 'back at base' and be contactable 24 hours a day throughout the duration of the visit.

He/she is responsible for:

- Ensuring they obtain sufficient information from the Group Leader
- Checking the group out at the beginning and checking them in at the end
- Acting as an emergency contact between the Group Leader, the establishment and parents/carers
- Initiating the 'overdue return' plan

A checklist for the Base Contact is in **Appendix 24**.

The Base Contact Person will stand down once the group have returned to base.

4.4.12 Children/young people

All children/young people should, as far as is reasonably practicable, take responsibility for ensuring that:

- The activity suits their needs and abilities
- They conform to any instructions or guidance on matters of safety and good order given by the Group Leader or other members of staff before or during the activity
- Any distress, concern, or discomfort arising during, or resulting from the activity is drawn to the immediate attention of the Group Leader or their immediate supervisor
- Keep a lookout for anything that may harm either themselves or anyone else in the group and tell the Group Leader or their supervisor about it

The responsibilities of parents and carers in re-enforcing and encouraging responsible attitudes in their young people must be recognised and accepted.

4.4.13 Parents/Carers

Parents/carers must be able to make an informed decision on whether their child should go on a visit. Parents/carers should be given sufficient information in writing and should be invited to attend any proposed briefing sessions.

(Appendices 10 and 11)

Parents/carers should:

- Be informed as to how best to prepare their child for the visit by reinforcing the notified code of conduct (where appropriate)
- Be aware of and agree to arrangements for sending youngsters/young people home early if necessary and to meet the costs incurred
- Provide the Group Leader with emergency contact information as requested
- Disclose to the Group Leader all relevant information about their child's psychological and physical health that may be relevant to their participation. This would normally be done via the parental consent form but may, on occasion, require further written information

4.5 CHANGES OF PLAN (PLAN B AND PLAN C)

4.5.1 It should be recognised that 'on the day' all may not go according to plan. An important contributing factor to safety lies in there being sufficient flexibility to change or modify the nature of the planned activity in the face of adverse factors such as weather, road conditions, group numbers and ill-preparedness of individuals for the planned activity.

4.5.2 A decision to change the plan to **Plan B** may be made either by the Group Leader on the basis of his/her own recognised experience and technical expertise, or on the advice of another member of the staff team delegated with responsibility for the conduct of the activity.

4.5.3 In either case, if the changes made involve the activity taking place in a different location or is likely to result in a delayed return, **the Group Leader must notify the Base Contact Person prior to commencement of the activity.**

4.5.4 Although rare, in extreme situations it may be necessary to go to **Plan C** (do **NOT** proceed with the visit).

4.6 **COMPETENCE OF STAFF**

It is part of the Head of Establishment's responsibility to ensure that staff have the appropriate competences to lead visits. Competence is derived from a blend of **experience including shadowing, training, common sense and working within known capabilities.**

It is a fundamental of Health and Safety law that employees are given appropriate training to carry out the tasks required of them. It is the employee's responsibility not to operate outside the scope of their competence. This applies even more so in circumstances where a duty of care for others has been accepted.

4.7 **SUPERVISION**

- 4.7.1 Adequate supervision of parties on visits is a crucial element of safety management. Supervision **must** be such that it is adequate throughout the visit.

Staffing ratios must reflect the needs of the group of children/young people and not simply the visit or activity. It is important to evaluate the composition of any group and give careful consideration to the needs of the individuals within that group. Only then can a realistic estimate be made of the requirements for staffing, staff expertise and resources to enable the objectives to be achieved.

- 4.7.2 **Due consideration should be given to gender balance.**

Group Leaders should consider supervision requirements as part of the risk assessment process. This should then inform the appropriate ratios and competences of supervisors.

It is recommended that there are always at least **TWO** staff accompanying visits except in circumstances where the activities are closely akin to normal day to day living.

It is acknowledged that there will be circumstances where it will be appropriate and beneficial to use senior pupils to assist with the supervision of younger children. Senior pupils must always be managed in this role by a member of establishment staff and must never be left in sole charge of young people.

- 4.7.3 **Supervision ratios**

Notwithstanding the above, the table below gives guidance on acceptable supervision ratios. These ratios should be regarded as a **maximum** and **must not be exceeded** but may well need to be reduced.

	Staff	Participants
Category 1 and 2 Visit (P1 – P3)	1	8
Category 1 and 2 Visit (P4 – P7)	1	10 (15 for local coach travel e.g. swimming lessons)
Category 1 and 2 Visit (Secondary)	1	15
Category 3 or 4 Visit NOT involving Adventurous Activities	1	10
Adventurous Activities:		
Forest walking, Low level walking, field studies, Coastal walking.		
Primary	1	10
Secondary	1	12
Orienteering – Level A: within school grounds	1	30
- Level B: Local park, permanent course	1	10
Hill and Mountain Walking (Summer)	1	10
Hill Walking on Local Hills (Winter)	1	10
Mountain Walking (Winter)	1	6
Rock climbing – Single pitch	1	9
- Multi Pitch	1	2
Gorge Walking (specified gorges)	1	10
Kayaking – Flat-water	1	10
- White-water	2	10
Sea Kayaking – Sheltered water	1	10
- Offshore	2	10
- Surfing	1	8
Open canoeing – Flat-water	1	10
- White-water	2	10
Alpine Skiing – within ski patrolled areas	1	10
Nordic skiing – Forest trails	1	10
Ski Touring / Ski Mountaineering	1	6
Cycling – On or Off-road	1	8
Sailing – Inland single-handed dinghies (max 2 students per boat)	1	6 boats
- Dinghies	1	1 boat
- Tidal waters, single-handed	1	6
Windsurfing	1	6

4.7.4 Technical Qualifications

Refer to **Appendix 19** for guidance on the appropriate levels of qualifications for the supervision of the activities above.

4.7.5 Larger parties

There are particular difficulties in safely managing large parties and reliance on staffing ratios alone is not enough. **For the duration of the visit each leader must assume separate responsibility for an appropriately sized group of named participants within acceptable ratios.**

4.7.6 Buddy systems

Staff supervision can be effectively complemented by the use of a buddy system. Participants are teamed up with one or maybe two 'buddies' and each regularly checks on the other(s). Buddy systems are also useful for encouraging and developing responsibility and a sense of community.

4.7.7 Group Management

It is vital that **head counts** are done at regular intervals and at least prior to and at the end of each group movement from one location to another. Keeping account of large groups is made easier by individual supervisors each accepting responsibility for a small manageable team and reporting directly to the Group Leader that their team is present and correct.

- 4.7.8 It is good practice for supervisors to:
- carry a names list of all participants and accompanying adults at all times
 - make sure that all participants know a rendezvous points if they become separated
- 4.7.9 Consideration could be given to:
- ensuring youngsters/young people are easily identifiable through the use of coloured T shirts, Baseball caps or school uniform/dress code or similar
 - Providing youngsters/young people with badges or cards containing details of their hotel and an emergency contact number. For overseas visits consider a card written in the local language
- 4.7.10 **Levels of Supervision**
Supervision of youngsters/young people must be maintained 24 hours throughout the visit. There are different levels of supervision:-
- **Close supervision** – the normal level of supervision within the active or programmed phases of the visit
 - **Remote supervision** – where activity is not directly supervised but participants are operating in groups within clearly stated and understood parameters. Supervisors are present but not necessarily within sight
 - **Down time** – the time outside programmed activity. May involve different levels of supervision from close supervision of organised recreational activity through remote supervision of ‘free time’ to being ‘on call’ during sleep time.
- 4.7.11 **Remote Supervision**
The nature of some educational visits or activities may require youngsters/young people to work in groups without direct supervision in order to properly meet learning objectives. The most common of these is probably Duke of Edinburgh Award Scheme expeditions, although certain types of practical field work may also require it.
- When young people are being remotely supervised, the party leader must:
- Ensure that parents/carers are aware.
 - Carefully brief youngsters/young people with clear guidelines on the parameters within which they should operate and emergency procedures/contacts. It is good practice to draw up a code of conduct to which youngsters/young people and parents/carers will commit.
 - Understand that remote supervision places additional demands on supervisors but that the duty of care owed to youngsters/young people is not diminished.
- Duke of Edinburgh Award Expeditions and similar visits must adhere strictly to these guidelines. Further information can be obtained from Midlothian’s Award Officer ([Appendix 26](#))**
- 4.7.12 **It is essential that everyone involved in the visit (staff and children/young people) understands the supervision arrangements and the expectations upon them.**
- 4.7.13 **Additional support needs**
It would not be possible in a general document like this one to provide specific advice relevant to all activities and all needs. The judgement of staff/volunteers skilled both in meeting additional support needs and the principles of good practice contained throughout this document should be relied upon.

- 4.7.14 In some cases the format of visit or activity and its venue may need to be adjusted to suit the individuals involved.
- 4.7.15 Equipment and other resources deployed may need particular consideration.
- 4.7.16 The number of staff/volunteers and the range of expertise and competencies should be determined by the needs of the individuals within the group and the nature of the activity. While particular competencies may be required to support participants with additional support needs, it is desirable that, with participant and parental consent, relevant information is shared with the group. This will enable group members to participate as fully as possible and be mutually supportive.
- 4.7.17 **Staff fatigue**
Leading visits, particularly those involving a residential stay can be both physically and emotionally demanding. It should normally be the case that at least two adults accompany any one group and due consideration should be given to sharing tasks and responsibilities.
- 4.7.18 It may sometimes be the case that the leader or instructor is the only member of field staff present. Consideration should therefore be given to providing a support member of staff who can share the driving and other appropriate tasks. Where relevant the issue of staff fatigue should be considered in the risk assessment process.
- 4.7.19 The European Working Time Directive 1998 (currently under review) provides work practice regulations designed to protect employees and those in their charge from the hazards associated with excessive fatigue.
- 4.7.20 **Child Protection**
The Group Leader and, wherever possible, all other Leaders should have undergone Level 1 Child Protection training.
- All volunteer adults with a supervisory responsibility should have undergone Disclosure Scotland checks to an enhanced level. It is acknowledged that this may not be possible for staff employed by organisations operating overseas and all reasonable steps should be taken to ensure that such staff have, at least, been screened by their employer.
- 4.7.21 It is recommended that Group Leaders and other Leaders have to hand a laminated pocket guide to Child Protection procedures.

4.8 MUST DO SUMMARY

1. **Make sure that everyone involved is briefed and aware of their roles and responsibilities**
2. **Maintain a process of dynamic risk assessment throughout the visit**
3. **Notify any changes of plan to the Base Contact as soon as possible**
4. **Maintain supervision levels 24 hours per day and within recommended ratios**
5. **Manage staff to ensure they carry out assigned roles and do not become over-fatigued**
6. **Make proper provision for group members with additional support needs**
7. **Evaluate the visit**

Chapter 5: RESPONSE TO EMERGENCIES

- 5.1 Emergency situations can occur despite the best precautions and therefore contingency planning and consideration of emergency procedures are necessary. Planning for emergencies should help to ensure that the consequences of an incident are handled efficiently and sensitively and do not progress arbitrarily.

Reference should be made to the Education and Children's Services Emergency Plan (August 2001) when preparing establishment contingency plans.

An Educational Emergency can be defined as:

"Any incident which cannot be resolved by an educational establishment employing its own resources. This could include death or serious injury to a member of staff, pupil, leaders and other helpers using educational property or on and educational visit. It could also include the loss of some or all of the party on an educational visit or expedition. Additionally, it could include traffic accidents, serious disruption caused by bad weather, damage to property, waterborne or food borne hazards and loss of heating or power supplies"

5.2 External Providers

Organisations providing accommodation, activities or other services involving the acceptance of a duty of care should have their own emergency response procedures with which Group Leaders and other staff should normally co-operate fully. In addition Group Leaders must familiarise themselves with the procedures outlined in this section to enable them to fulfil any additional responsibilities and make prompt and appropriate notifications.

5.3 PLANNING FOR EMERGENCY SITUATIONS

The principles outlined provide a format for response and communication for Council groups encountering misfortune whilst away from their normal base. These principles do not attempt to provide details for all possible situations. They should however be used as a framework around which establishments develop their own more detailed plans to suit their particular situation.

- 5.3.1 The effectiveness of all such plans depends heavily upon the staff concerned being familiar with their specific duties and responsibilities. The role of each individual must be understood by all concerned. Lines of communication must be confirmed or established for each planned excursion.
- 5.3.2 The flow chart in **Figure 1** (page 32) identifies the different **Levels of Emergency** and represents the required channels of communication during the containment phase. The subsequent investigation procedures are an entirely separate but essential process.
- 5.3.3 **Emergency Action Card**
The card shown as **Appendix 25** has been produced to provide Group Leaders and their assistants with a summary of prioritised actions in the immediate aftermath of an accident or other emergency.
- 5.3.4 Group Leaders **must** take the **Emergency Action Card** with them **[on Category 2, 3 and 4 visits]** when they leave the establishment. The card must be kept close at hand for easy reference throughout the duration of the visit.

5.3.5 The Flow Chart (**Appendix 6**) is schematic. Common sense should prevail in the preparation of plans and in subsequent actions.

5.3.6 If Base Contact cannot be contacted

If Base Contact or others cannot be contacted in an emergency, contact should be made with **MIDCON on 0131 271 3084 or 0131 271 3018 stating that it is an educational emergency**

5.3.7 Preparation of plans - establishment and area

Detailed arrangements will need to be made by each establishment. These will reflect the nature and size of the establishment and the nature of the activities planned or anticipated. The use of previously prepared Action Cards should be considered.

5.3.8 Individual roles need to be carefully considered, especially in very small establishments (e.g. one or two teacher primary schools). Frequently a member of staff may find that they are undertaking two or more roles e.g. the Head of Establishment may also be the Group Leader, with the Base Contact role performed by their Depute or another member of staff or, in some cases, a spouse or a parent.

Where the Base Contact role is undertaken by a person who is not a member of staff the function will be limited to the relaying of information in a predetermined manner.

5.3.9 It must be recognised that many visits will take place out of 'normal' hours. Planned contact arrangements must take account of this.

5.3.10 When a Group is Overdue the Scheduled Return Time

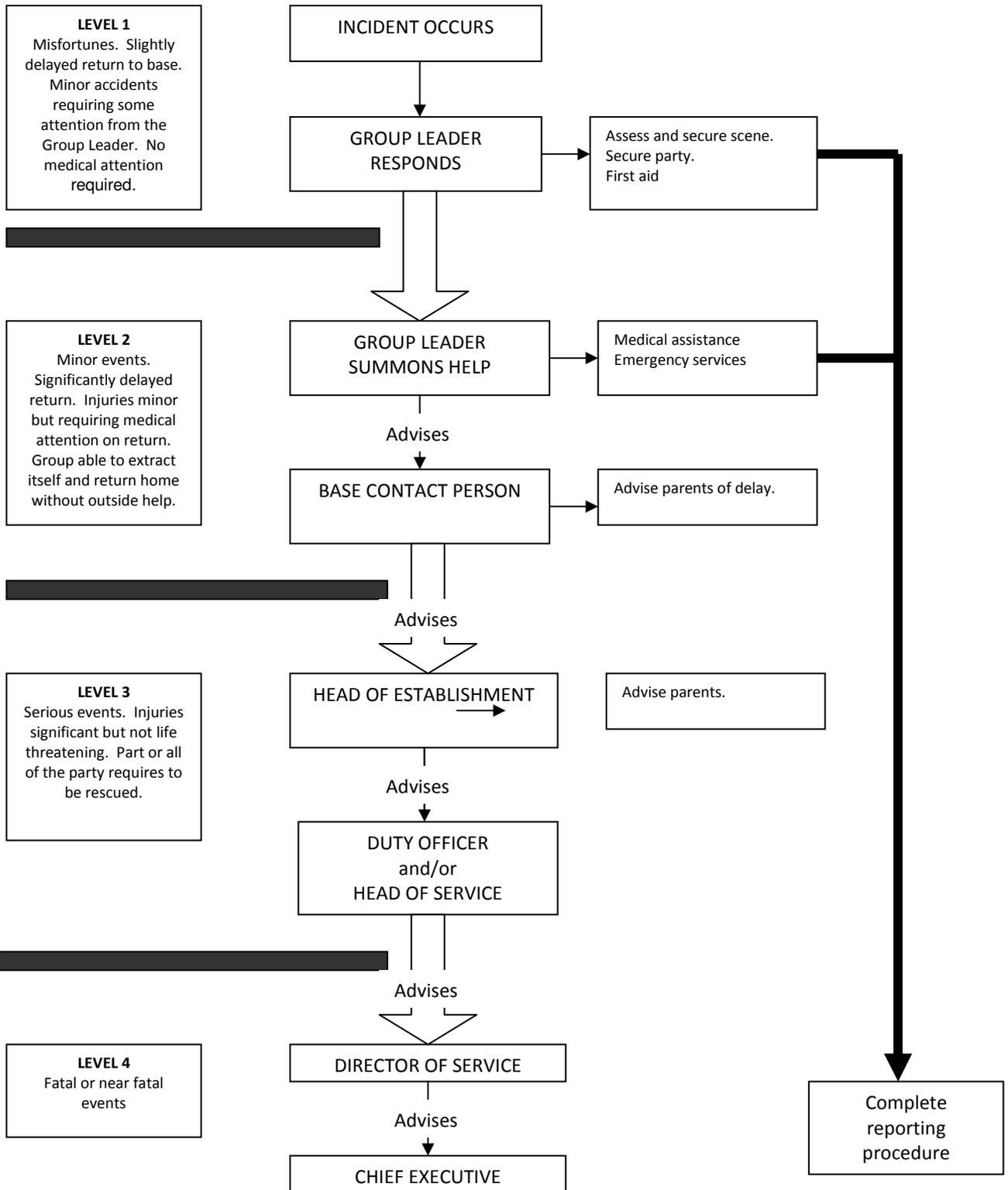
It is important that a systematic approach is adopted in responding to the late return of groups. This should ensure there is no dramatic over-reaction to simple unavoidable delay but should equally ensure a prompt response in circumstances where the overdue return may be the result of a serious incident.

5.3.11 The Group Leader must make every effort to inform the Base Contact of any significant delay in order to circumvent unnecessary worry and response. Failing this the following procedures should be implemented:

Group overdue by:	Status	Actions & Response
More than 30 minutes	Heightened awareness	<ol style="list-style-type: none"> 1. General awareness raised – looking out for safe return 2. Re-assure any concerned relatives 3. Telephone Group Leader or to last known point if possible
More than 1 Hour	Low key search	<ol style="list-style-type: none"> 1. Initiate a low key search of general area where group are expected to be. Include expected location of vehicle. 2. Use local people/knowledge where possible. Have they been seen? 3. Treat as Level 2 incident
More than 2 Hours	Full scale response	<ol style="list-style-type: none"> 1. Notify police if you have not already done so and initiate full scale search 2. Treat as Level 3 incident until further details are known

Safe return of the group MUST always be reported as soon as possible.

Fig 1. Emergency Response Flow Chart



5.4 INVESTIGATION OF INCIDENTS

Although the responses to an emergency and any subsequent investigation have common threads, they should always be regarded as entirely separate management functions.

- 5.4.1 Investigation procedures must be designed to cater for various levels of incident and to allow sensitive handling of situations arising from unplanned circumstances. Fig 2 below provides guidance on the designations of staff that should be involved for the various levels of incident.

Figure 2 – Investigation of Incidents

Level of Incident	Staff Involved	Other Contributors	Circulation of Report
Levels 1 and 2	Head of Establishment/ Community Learning and Development Team Leader (PTOL for outdoor activities)	Relevant School or Organisation, Community Learning and Development Staff Participants	If appropriate to those involved in the incident
Level 3	Schools Group Managers/Education Officers	Head of Establishment and relevant staff participants, Health and Safety Officer	All those involved
Level 4	Director, Education and Children's Services (and/or Independent Consultant/s)	Head of Service, Head of Establishment and relevant staff participants, Health and Safety Officer	Chief Executive All those involved

- 5.4.2 The investigation should be an information gathering exercise. As such it should be carried out in a reasonably informal and non-judgmental manner. The intent is to seek the causes of incidents in order to inform the ongoing development of good practice.

5.4.3 Investigation does not automatically imply incompetence or negligence.

- 5.4.4 Where, as a result of the investigation, there is a possibility of disciplinary or other action being followed the investigating officer must exercise caution to ensure that one process does not compromise another. Advice from Senior Officers and/or Personnel Services should be sought before proceeding with the investigation of the incident.

- 5.4.5 **Near misses** must be investigated as low level incidents by the Head of Establishment.

The investigating officer will draw upon the observations of staff and participants in a form they feel appropriate.

5.5 MUST DO SUMMARY

- 1. Carry an emergency action card**
- 2. Ensure reliable 24 hour communication with the Base Contact**
- 3. Ensure Base Contact has all the required information**
- 4. Take clear charge of the situation in the immediate aftermath of an incident.**
- 5. Carry out required reporting procedure**
- 6. Co-operate fully with any investigation**

Glossary

Accountability With The Council's Services	Page 19		4.3
Additional Support Needs	Page 25		4.7.13
Adequate Supervision	Page 3		2.7
Adventurous or Outdoor Activities (Visits Involving)	Page 12		3.11
Adventure or Outdoor Activity Equipment	Page 13		3.11.4
Authorisation	Page 5		3.2
Authorisation : Initial Approval - Head of Establishment	Page 5		3.2 Step 1
Authorisation: Head of Establishment	Page 5		3.2 Step 3
Base Contact Person	Page 21		4.4.11
Breakdowns: Emergency Assistance	Page 17		3.14.15
Buddy Systems	Page 24		4.7.6
Categories of Visits	Page 2		1.8
Category 3 and 4 Visits: Special Considerations	Page 10		3.10
Changes of Plan (Plan B and Plan C)	Page 22		4.5
Child Protection	Page 26		4.7.20
Coach Hire	Page 17		3.14.22
Council owned Transport	Page 15		3.14.1
Competence of Staff	Page 23		4.6
Definitions and Categories of Visits	Page 1		1.7
Delegated Member of Staff	Page 20		4.4.4
Detailed Planning and Risk Assessment: Group Leader	Page 5		3.2 Step 2
Disclosure Checks (child protection)	Page 10		3.9.4
Driver's Checklist	Page 17		3.14.21
Duty of Care	Page 3		2.2

Emergency Action Card	Page 27		5.3.3
Emergency Response Flow Chart	Page 29		
Emergencies – see also Response to Emergencies	Page 27		
European Package Travel Directive (currently under review)	Page 9		3.8
Evaluation	Page 4		2.13
Exploratory Visits	Page 7		3.3.9
External Providers	Page 27		5.2
External Providers of Adventurous or Outdoor Activities	Page 12		3.11.2
External Providers/Contractors	Page 9		3.9
Farm Visits	Page 11		3.10.4
Financial Planning	Page 9		3.7
First Aid Provision	Page 8		3.5
Forms of Risk Assessment	Page 6		3.3.4
Gender Balance	Page 23		4.7.2
Go Ahead and Implementation: Group Leader	Page 5		3.2 Step 4
Good Communication	Page 4		2.10
Group Leader	Page 20		4.4.5
Group Management	Page 24		4.7.7
Informing Parents and Parental Consent	Page 7		3.4
In-house Provision	Page 12		3.11.3
Insurance	Page 8		3.6
Investigation of Incidents	Page 30		5.4
Larger Parties	Page 24		4.7.5
Leaders	Page 21		4.4.8
Levels of Supervision	Page 25		4.7.10

Management of Visits	Page 19	Chapter 4	
Management of Visits - Must Do Summary Chapter 4	Page 26		4.8
Maximum Speed of a Council Minibus	Page 16		3.14.8
Mobile Phones (use of)	Page 18		3.15
Monitoring	Page 4		2.12
MUST DO Summaries	Page 1		1.5
Near Misses	Page 30		5.4.5
Objectives (well defined)	Page 3		2.5
Organising Your Own Visit	Page 15		3.13.2
Overdue Group	Page 28		5.3.10
Overdue Group (Table of Action and Response)	Page 28		
Overseas Travel	Page 17		3.14.19
Overseas Visits (Outside the UK)	Page 14		3.13
Overnight Stays (Visits Involving)	Page 13		3.12.1
Parents/Carers	Page 22		4.4.13
Planning and Preparation	Page 4		2.11
Planning for Emergency Situations	Page 27		5.3
Planning Visits	Page 5	Chapter 3	
Planning Visits - Must Do Summary Chapter 3	Page 18		3.16
Preparation of Plans – Establishment and Area	Page 28		5.3.7
Principles of Safety Management	Page 3	Chapter 2	
Private Car Use	Page 15		3.14.1
Public Liability Insurance	Page 10		3.9.3
Roles (Clearly Defined)	Page 4		2.9
Remote Locations	Page 12		3.11.1

Remote Supervision	Page 25		4.7.11
Repeated Events	Page 7		3.3.6
Residential Stays and Overseas Trips	Page 13		3.12
Residual Risk	Page 7		3.3.8
Response To Emergencies	Page 27	Chapter	5
Response to Emergencies - Must Do Summary	Page 31		5.5
Risk Assessment	Page 3		2.6
Risk Assessment	Page 6		3.3
Roles and Responsibilities at Establishment Level	Page 19		4.4
Staff Fatigue	Page 26		4.7.17
Supervision	Page 23		4.7
Supervision of Passengers	Page 18		3.14.24
Supervision Ratios	Page 23		4.7.3
Swimming In The Sea Or Other Natural Waters	Page 11		3.10.2
Technical Qualifications	Page 24		4.7.4
Training of Staff	Page 3		2.8
Transport	Page 15		3.14
Travel Agent or Tour Operator Bookings	Page 15		3.13.1
Youngsters/Young People	Page 22		4.4.12

**Midlothian Council - Education and Children's Services
Educational Visit Risk Assessment**

RISK ASSESSMENT FOR:		ASSESSMENT UNDERTAKEN BY:	
Activity:		Date:	
Location:		Signed:	
Date:		Review date:	
STEP 1	STEP 2	STEPS 3 and 4	STEP 5
List the significant hazards here	Who might be harmed?	List existing controls or note where the information may be found. List risks which are not adequately controlled and the action needed.	Review and Revision - note the effectiveness or otherwise of the listed control measures as occasion demands. Use this reviewed information as basis for revised risk assessment.

Midlothian Council - Education and Children's Services
Sample Risk Assessment for Educational Visit

Activity: Learnmore PS - Primary 3 outing		Assessment undertaken by: Jones		Reviewed by:			
Location: Yellowcraigs Beach, nr North Berwick		Date: 03 May 2009		Date:			
Date: 18 June 2009							
STEP 1		STEP 2		STEPS 3 and 4		STEP 5	
List the significant hazards here		Who might be harmed?		List existing controls or note where the information may be found. List risks which are not adequately controlled and the action needed.		Review and Revision - note the effectiveness or otherwise of the listed control measures as occasion demands. Use this reviewed information as basis for revised risk assessment.	
Travel safety: breakdowns and accidents		Young people/staff and others		Use of approved contractor; seat belts to be worn; ensure exits are kept clear; emergency planning procedures known by all. PC forms and mobile phone carried.			
Paddling in the sea		Young people/staff		If in water, adult with life saving training Close supervision by competent person Regularly check that the group is all present through visual checks/headcounts			
Tide coming in quickly		Young people/staff		Check timing of tides and other hazards e.g. rip tides, sandbanks, steeply shelving beach Information from local coastguard, if necessary			

Slipping on rocks near rock pools	Young people/staff and others	Pre-trip warning of slippery conditions on rocks/steep slopes Ensure children have appropriate footwear for rocks Staff trained in first aid – first aid kit + PC forms carried	
Very hot or very bad weather	Young people/staff	Obtain and take heed of weather forecasts e.g. wind speed/direction, precipitation, temperature Ensure all pupils have appropriate clothing and footwear and sun tan cream if appropriate	Review and change plans if weather becomes extreme
Coming into contact with hazardous objects	Young people/staff	Look out for hazards such as broken glass, barbed wire, sewage outfalls. Ammunition and other war ordinance should be left alone and authorities notified	
Personal safety/getting lost	Young people	Brief pupils on “rules” for the beach – going in twos and threes, consider which areas should be out of bounds. Establish base on beach to which pupils return if separated. Ensure head counts are carried out at regular intervals	Review if pupil(s) have special educational, medical or social needs

Midlothian Council - Education and Children's Services

Generic Checklist for Planning Visits

At the Time of Initial Approval from Head of Establishment	
Educational and other objectives clarified and agreed	
Staff roles initially agreed	
Disclosure Scotland checks obtained (where appropriate)	
Gender balance of accompanying staff determined	
Nature of administrative and financial arrangements agreed	
Provisional dates agreed	
Approximate costs	
Initial approval sought (Appendix 7)	
Initial Planning	
Exploratory visit (recommended)	
External providers checked (safety management systems, public liability insurance, staff competencies etc)	
Risk Assessment recorded	
Staff competencies sufficient and appropriate (including First Aid)	
EV1 form submitted for Category 3 and 4 visits	
Additional support needs identified	
Provisional Bookings made:	
• Venues	
• Accommodation	
• Transportation	
• Providers	
• Services / Resources	

Information to parents prepared and sent	
Parental consent forms (PC) sent	
Financial arrangements in place	
Insurance arrangements in place	
Base Contact person agreed	

Later Preparation	
Participants established & parental consent forms (PC) returned	
Individual & group needs identified	
Confirm bookings:	
• Venues	
• Accommodation	
• Transportation	
• Providers	
• Services / Resources	
Detail plan finalised - including all contingencies	
Plans conform to Council's Off-Site Visits Policy	
Prepare teaching material specific to event	
Clarify staff roles & interim tasks	
Ongoing briefing to participants	
Check control measures in place	

Final Preparation	
Final authorisation from Head of Establishment	
All administrative & financial arrangements finalised	
Briefing and handover of files to Base Contact	
Briefing to staff and copies of Risk Assessment	
Briefing to participants	
Check on resources and equipment - party & individual	
Any new medical, dietary, other additional support needs, emergency contact details	

At the Start of the Visit	
Weather and other related forecasts	
Roll call of all participating - grouping and supervision arrangements	
Contingency plans understood by all	
Fire drills and other safety checks carried out at venue / accommodation	
Emergency Action Card and PC forms carried	

Once Visit is over	
Borrowed equipment returned where appropriate	
Review and feedback	
Evaluation and Reports (if any) prepared	
Financial statements finalised	

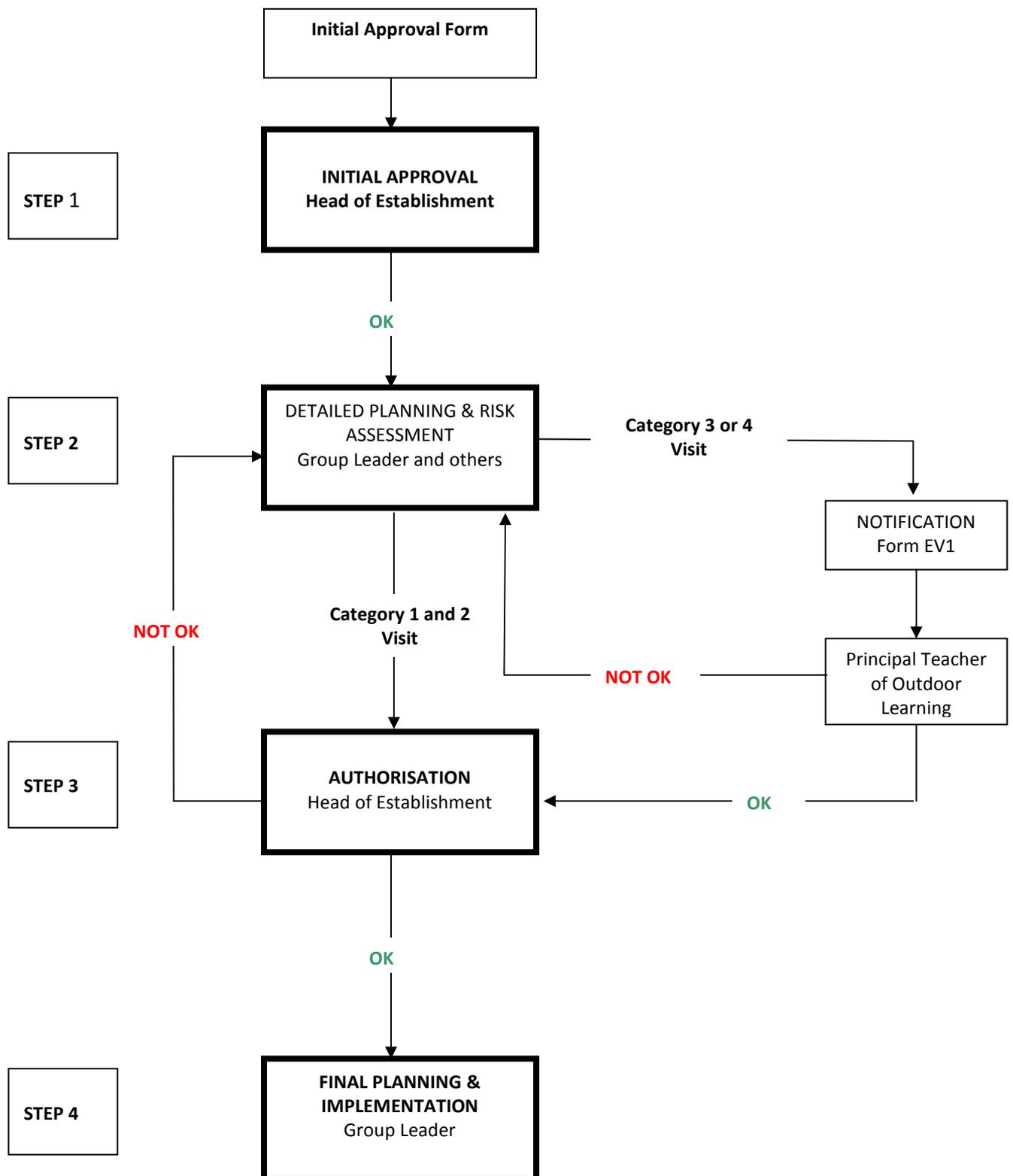
**Midlothian Council - Education and Children's Services
Checklist for Group Leaders of Category 2 Visits**

- permission of Head of Establishment or Line Manager (Initial Approval Form)
- pre-visit (recommended) and book visit (if necessary)
- risk assessment recorded
- full written information to parents/carers
- PC forms to parents/carers and returned (completed) to Group Leader
- briefing of all staff/helpers
- take PC forms on visit
- leave accurate register and all details of visit at Base
if "out of normal hours" then
- leave copies of PC forms and all visit details with Emergency Base Contact
- emergency planning and procedures in place

**Midlothian Council - Education and Children's Services
Checklist for Group Leaders of Category 3 and 4 Visits**

- permission of Head of Establishment or Line Manager (Initial Approval Form)
- book visit
- pre-visit centre/hotel/hostel/area (recommended)
- record risk assessment
- EV1 form submitted to PTOL at least 28 days in advance
- **PC forms to parents/carers and returned (completed) to Group Leader**
- written information for parents/carers (see Appendices 10 and 11)
- meeting for parents/carers (if appropriate or necessary)
- briefing of all staff/helpers
- take PC forms on trip and have to hand at **all** times
- take prescribed (and, where appropriate, non-prescribed) medicines and appropriate forms/instructions on visit
- carry emergency contact details of all accompanying staff
- carry Emergency Action Card (Appendix 25) and have key contact telephone numbers entered into mobile phone(s)
- leave copies of PC forms with emergency contact **AND** work base (School or Community Learning and Development or Integration Team Office or Sports and Leisure Office)
- give all Base Contact Information (Appendix 24) to Base Contact Person
- emergency planning and procedures in place

Midlothian Council – Education and Children’s Services
Flowchart of Visits Approval



Midlothian Council - Education and Children's Services
Initial Approval Form
 (Sample for internal use within Establishments)

This form must be submitted to the Head of Establishment for approval before visit arrangements are made.

TYPE OF VISIT

	Tick
Curriculum related (within the school day)	<input type="checkbox"/>
Optional trip involving no overnight stay	<input type="checkbox"/>
Optional trip involving an overnight stay	<input type="checkbox"/>
Travel related to sports fixture or similar	<input type="checkbox"/>
Official visit abroad	<input type="checkbox"/>
Outdoor Activities and/or Remote Location	<input type="checkbox"/>

VISIT DETAILS

Name of Visit

Name of Party Leader

Destination

Brief description of visit including educational objectives

Date(s) and times of visit

Eligible year/age groups

Estimated numbers participating	Participants	Staff (Please name)	Other Adults (Please name)
<i>*Please note that where visits involve an overnight stay at least one reserve member of staff must be identified.</i>			

Costs

Will staff cover be required?

Approx total cost per participant
 Proposed total cost to be paid by Establishment

All staff accompanying this proposed visit have discussed cover implications with their line managers. I have checked the Establishment's calendar for potential clashes and have discussed cover implications with the appropriate member of the SMT

Signature of Group Leader _____ Date _____

Approval by Head of Establishment

I do/do not authorise the proposed visit subject to/for the following reasons

I authorise finance to subsidise this visit to the sum of _____

Signed Head of Establishment

Date

APPLICATION FOR APPROVAL FOR CATEGORY 3 OR 4 EDUCATIONAL VISITS

EV1

This form should be submitted to outdoorlearning@mgfl.net OR to the Principal Teacher of Outdoor Learning, Penicuik Town Hall, 33 High Street, Penicuik, EH26 8DS **not less than 28 days prior to the date of the proposed activity.**

NAME OF ESTABLISHMENT / GROUP

ADDRESS

TELEPHONE NO. **FAX. NO.**

Name of person to whom this form should be returned **EMAIL**

SECTION A (To be completed by ALL APPLICANTS)

Description of purpose of visit

Dates and estimated times of:

Departure	
Return	

Destination of Visit

Details of accommodation to be used (name, address, contact details)

Number of participants

Male		Female		Total	
------	--	--------	--	-------	--

Age range Class(es) (where appropriate)

Name of Group Leader	Male/Female	Competencies		
		Experience	Training	First Aid (incl. dates)

Names of other leaders	Male/Female	Competencies		
		Experience	Training	First Aid (incl. dates)

Form of Transport to be used

(please refer to the relevant Midlothian Policy Guidelines)

If using a hired vehicle please detail name, address and contact details of hirer(s). If using personal car H.E. must check that licence is valid, and business insurance is in place.

Have you visited the destination / area before?

If NO is an exploratory visit planned?

Has risk assessment been undertaken?

Have checks been made on external contractors?

Details of programme of activities

Previous experience of group

SECTION B (Only complete if Outdoor Adventure Activities are being undertaken)

NAME, ADDRESS AND CONTACT DETAILS OF PROVIDER

Does the provider hold an AALA Licence?

(Please note the PTOL will make checks on all new providers)

SECTION C (Only complete if visit is to a foreign country)

Country (ies) to be visited

Is group leader / other leader(s) conversant in the language of the country (ies) to be visited

SECTION D

I confirm that a risk assessment has been undertaken

Signed Head of Establishment Date

SECTION E

Recommended / Not Recommended / Comments (see overleaf and/or attached memos)

Signed Principal Teacher of Outdoor Learning Date

SECTION F

Signed Head of Establishment or Director of Education and Children's Services* Date

I have studied this Approval Form and am satisfied with all aspects, including the planning, organisation, competence of leaders and staffing of this visit. Approval is given.

* If the PTOL does NOT recommend the proposed visit and the Head of Establishment still supports the application final authorisation must come from the Director, Education & Children's Services Division.

PARENTAL AGREEMENT FOR EDUCATIONAL VISITS**PC Form**Establishment/Group: Name of pupil/student: Details of visit to: Date of Birth: Date(s) From: To: Class: Time(s) From: To: Home Address:

I agree to _____ (name) taking part in this visit and have read the information sheet. I agree to his / her participation in the activities described. I acknowledge the need for him / her to behave in a responsible manner.

Medical information about your child

Any condition requiring medical treatment, including medication?

 YES / NO

If yes, please give brief details

Any known allergy to medicine (e.g. penicillin) or other factors (e.g. animals)

Name, address and telephone number of your family doctor

Please give details of any special diets e.g. vegetarian/diabetic/no specific 'E' numbers etc.

Can your child swim 25 metres?

 YES / NO**(Being unable to swim will not necessarily prevent your child from taking part in a water-based activity)**

I will inform the Group Leader/Head of Establishment as soon as possible of any changes in the medical or other circumstances between now and the commencement of the visit.

Insurance Information

Midlothian Council provides public liability cover and travel cover for approved educational visits.

The planned visit will take place according the Midlothian Council's Off-Site Visits Policy. A copy of the policy is available for inspection from the Group Leader or on the Council website. The visit has been risk assessed and every effort will be made to minimise risk. Nonetheless, a totally risk free environment is unrealistic and in signing the parental consent form, you are asked to acknowledge that a degree of residual risk remains. It is not anticipated that risks will exceed those incurred in normal day to day living.

Declaration

I agree to my son/daughter receiving medication as instructed 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 limitation of the insurance cover provided.

OR

I give permission for my child to receive emergency medical treatment/anaesthetic as considered necessary by the medical authorities present, with the exception of the administration of blood or blood products. I accept full legal responsibility for this decision and release Midlothian Council and its staff from an liability for any consequences resulting from this decision.

Contact name and telephone numbers

Name Home Tel No

Work Tel No Mobile Tel No

Alternative contact name and telephone number (e.g. grandparent/neighbour)

Name Tel No

Relationship to pupil

Signed _____ (Parent/Carer) Date _____

Please return this form to _____ by Date _____

Midlothian Council - Education and Children's Services Information for Parents/Carers



Midlothian Council's safety policy requires that parents/carers should be informed, at an early date, with full and explicit information about visits. Employees designated as Group Leaders of a visit must ensure that a communication containing the information that is relevant to the planned visit is sent to parents in advance of the visit taking place. A sample check list of key information is listed below.

What information parents/carers receive will be guided by the duration and type of visit. In most cases the PI Form will suffice but additional information will have to be given for 'longer' visits e.g. a visit abroad

SAMPLE INFORMATION SHEET CHECK LIST

1. Name and designation of the person authorising the visit.
2. Name of establishment/base promoting the visit (School/Community Learning and Development Centre/TOP Services/Integration Team/Sport and Leisure etc.)
3. Name of external organisation contracted to provide all or part of the programme.
4. Names(s) and designation(s) of person(s) responsible for the planning and conduct of the activity.
Relevant qualification(s) and experience of leader(s) (where appropriate).
Name(s) of any other adult accompanying the group.
5. Detailed statement on proposed activity (ies) including location, duration and demand likely to be made on participants.
6. Preparatory training undertaken/completed
7. Details of proposed programme including:
Transport (type, pick-up and dispersal points and timings).
Accommodation (location, description, telephone number).
Meals/food arrangements.
Supervision.
8. Clothing to be worn or carried
9. Total cost and financial arrangements.
10. Codes of conduct/behaviour expected and sending home procedures if these are not met.
11. Guidance on spending money
12. Equipment to be provided.
13. Names, addresses and telephone numbers of Emergency Base Contact (where appropriate).
14. Procedures to be followed in an emergency by parents/carers, leaders or contact persons.

15. Statement of insurance cover provided for members of the group by the Council (where appropriate)

16. Safety Management and Acknowledgement of Risk: Sample statement:

“The planned visit will take place in accordance with Midlothian Council’s Off-Site Excursion Policy. A copy of the policy is available for inspection from the Group Leader or on the Council website. The visit has been risk assessed and every effort will be made to minimise risk. Nonetheless a totally risk free environment is unrealistic and in signing the parental consent form you are asked to acknowledge that a degree of residual risk remains. It is not anticipated that risks will exceed those incurred in normal day to day living.”

Parents/carers should be asked to acknowledge this, when giving their consent for their child to take part.

17. Any other relevant information.

NOTE: It is essential that the attention of parents/carers is directed to the need for retaining all relevant information, so that, in the event of an emergency, accurate information is readily available.

Parental Information for Educational Visit

PI Form

Details of educational visit **(to be retained by parent / carer)**

Venue		Activity(ies)	
-------	--	---------------	--

Date (s)		Departure /Return Time	
----------	--	------------------------	--

Details of residential provision (if applicable)	
Name of Centre / Hotel	
Address	
Postcode	
Contact Telephone No.	

Form of Transport		Name of Leader	
-------------------	--	----------------	--

Other Leaders	
---------------	--

Volunteers required to help with visit? YES / NO

Packed Lunch Required?	YES / NO	School uniform/dress code required?	YES / NO
------------------------	----------	-------------------------------------	----------

Cost of Visit

What needs to be brought for the visit (e.g. waterproof top, wellies)

Signed _____ Date _____

Head of Establishment _____

Any further information relating to the visit will be given out in due course.

Unscheduled delays may occur on visits. Should this happen, the Group Leader will notify the Emergency Base Contact person as soon as possible.

REQUEST FOR ESTABLISHMENT TO ADMINISTER MEDICATION

MED1

The Establishment will not give your child medicine unless you have completed and signed this form and the Head of Establishment has agreed that his/her staff can administer the medication.

1. DETAILS OF CHILD/YOUNG PERSON

Child's name: Date of birth:

Address:
.....
.....

School: Class:

Tel. No: Home Emergency

2. DETAILS OF MEDICATION

Condition or illness

Name/type of medication (as described on the container)

Prescribed by: please ✓

GP Name
Address

Hospital Name
Address.....

Other Name
Address

For how long will your child take this medication?

Full directions for use:

Dosage and method?

Times at which medicine(s) should be given:

Special precautions:

Side effects (if any):

Procedures to be taken in an emergency: (e.g. asthma – maximum number of doses to be administered for treatment of acute wheezing?)

.....
.....
.....

3. STAFF INDEMNITY

“Midlothian Council hereby indemnifies all authorised staff at the Establishment from and against claims for alleged negligent actions, costs, charges, losses, damages and expenses which they or any of them shall or may incur or sustain by reason of any alleged negligent act or omission by them in the administration of the medication to the Child, provided always that the alleged negligent act or omission was done in the course of their employment.”

4. PARENTAL RESPONSIBILITY

- (i) I understand that I must deliver the medicine(s) personally to you and to replace them wherever necessary and accept that this is a service which the Establishment is not obliged to undertake.
- (ii) I accept responsibility for advising you immediately of any changes of treatment prescribed by any doctor or hospital.
- (iii) I understand the terms of the Staff Indemnity.

Signature of parent/carer: Date

Date received by Establishment

Head of Establishment's Signature

ACTION TAKEN

MED2

REQUEST FOR MEDICATION TO BE SELF ADMINISTERED

This form must be completed by parents/carers of young persons under 16.

1. DETAILS OF CHILD

Child's name: Date of birth:

Address:
.....
.....

School: Class:

Tel. No: Home Emergency

2. DETAILS OF MEDICATION

Condition or illness

Name/type of medication (as described on the container)

Prescribed by: please ✓

GP Name
Address

Hospital Name
Address.....

Other Name
Address

For how long will your child take this medication?.....

Full directions for use:

Dosage and method?

Times at which medicine(s) should be given:

Special precautions:

Side effects (if any):

Times at which medicine(s) should be given:

Special precautions:

Side effects (if any):

Procedures to be taken in an emergency: (e.g. asthma – maximum number of doses to be administered for treatment of acute wheezing?)

.....
.....
.....

3. PARENTAL RESPONSIBILITY

- (i) I would like my daughter/son to keep her/his medication on her/him for use as necessary.
- (ii) I understand that I must deliver the medicine(s) personally to you and to replace them wherever necessary.

Delete (i) or (ii) as appropriate.

Signature of parent/carer: Date

Date received by Establishment.....

Head of Establishment's Signature

ACTION TAKEN

NON-PRESCRIBED MEDICATION

Name of child/young person	
School/Group	
Educational Visit to	
Dates	

Please mark with an **X** which medication your son/daughter **CANNOT** be given.

Type of non-prescribed medicine	Please indicate which medication CANNOT be given
Calpol or paracetamol for pain relief	
Sun cream for protection from the sun (Factor 10 – 50 UVA/UVB)	
After sun/Calamine lotion	
Insect repellent (not DEET based product)	
Calamine lotion or antihistamine cream to soothe insect bites etc.	
Piriton or similar for allergy, insect bite etc.	
Cold sore ointment	
Throat lozenges	
Travel sickness tablets	
Diarrhoea relief	
Eye drops	
Other(s) Please specify	

Signed		(Parent/carer)
Date		

Medication will be administered according to the directions on the label unless otherwise instructed by the parent/carer.

A record will be kept of all medication administered.

Wherever possible, practical and appropriate parents/carers will be contacted about proposed distribution of medication.

Midlothian Council - Education and Children's Services



Financial Records: Exemplar

VISIT BOOKING AND PAYMENT RECORD													
Educational Visit to:						Date:							
INCOME													
	Names	Contact	Total Fee Payable	Deposit Required	Date Paid	Balance due	Instalment 1	Date Paid	Instalment 2	Date Paid	Instalment 3	Date Paid	Total Paid
1													
2													
3													
4													
5													
6													
7													
8													
10													
11													
12													
												TOTAL FEES PAID	
EXPENDITURE													
	Item	Cost											
TOTAL OUTLAYS												£	
CLOSING BALANCE													

Financial Records: Exemplar

**ACCOUNTING RECORDS FOR
WATERSPORTS TRIP TO FRANCE 2008**

Date	Details	Dr (in)	Cr (out)	Balance
01 Feb. 08	Cost of Trip £340 x 38 students	£ 12,920.00		£ 12,920.00
20 June 07	1st Deposit		£ 1,292.00	£ 11,628.00
06 Oct. 07	2nd Deposit		£ 2,584.00	£ 9,044.00
12 Dec. 07	3rd Deposit		£ 2,584.00	£ 6,460.00
24 Apr. 08	Final Payment		£ 6,460.00	£ -
28 May 08	Spending Money from 38 students	£ 4,623.00		£ 4,623.00
12 June 08	Spending Money changed to Euros		£ 4,623.00	£ 6,164.00
17 June 08	Emergency Fund	£ 500.00		£ 6,664.00
17 June 08	Tuck Shop Loan	£ 100.00		£ 6,764.00
29 June 08	Tuck Shop Loan repaid		£ 100.00	£ 6,664.00
29 June 08	Emergency Fund repaid		£ 500.00	£ 6,164.00
		£ 18,143.00	£ 18,143.00	£ -

External Providers/Contractors

External Transport Providers should be checked by the Midlothian Travel Team

Checklist

Name of External Provider/Contractor	Address and Contact details
How long has your organisation been operating?	
Have risk assessments been undertaken for all activities?	YES/NO*
Do you have Safety Management systems and Standard Operating Procedures in place?	YES/NO*
If YES how often are they reviewed?	
Is work monitored /moderated by any external organisation(s)?	YES/NO*
If YES which?	
Is your organisation affiliated to any professional organisation(s)?	YES/NO*
If YES which?	
Can additional support needs of group members be accommodated? (some discussion may be necessary)	YES/NO*
Record of staff competencies (experience, training, qualifications etc.)	Please send records
Public Liability Insurance cover – an indemnity limit of a minimum of Five Million Pounds is required	Please send a copy of cover
Do you accept a Duty of Care* for young people?	YES/NO*
If YES please tick the declaration below	
I confirm that all staff who will have access to participants have been Disclosure checked to an enhanced level (please tick box) <input type="checkbox"/>	

Please add any other information which you deem important and/or necessary	
	Signed
	Position in Organisation
	Date

***Duty of care** is a legal obligation owed by anyone who takes responsibility for the safety of others. This applies equally to associated aspects of safe practice such as use of minibuses, fire and domestic safety, safety in built-up areas and provision of appropriate insurance. The duty of care owed to someone is heightened if the person is a youngster/young person or has physical or learning difficulties.

Once the External Provider/Contractor has completed and returned this form to you please send a copy to:

**Principal Teacher of Outdoor Learning
 Penicuik Town Hall
 33 High Street
 PENICUIK
 EH26 8HS**

Fax: 01968 664117

Email: outdoorlearning@mgfl.net

Qualifications Matrix

For all activities leader must hold a current and appropriate First Aid qualification

ACTIVITY	LEADER QUALIFICATION	TECHNICAL EXPERT	NOTES
Field Studies/Environmental Studies	Dependent on Venue	Summer ML	If activity takes place in a potentially hazardous or remote environment, the relevant qualifications for that location must be held.
Low Level Walking/Forest Walking/Field Studies	First Aid Qualification Basic competencies	Summer ML	Applies to anywhere more than 10 minutes but less than 30 minutes walking time away from an accessible road.
Summer Hillwalking	Summer ML	MIA & Winter ML	
Summer low level walks	BEL Level 2 Award (formerly BELA or BETA)	As above or Summer ML	The remit of the BEL specifically excludes steep slopes, hill terrain and remote locations.
Winter Climbing	MIC	MIC	
Winter Hillwalking	Winter ML	MIC	Winter is any time when there is snow or ice underfoot or when it is forecast.
Winter Hillwalking (Local)	Summer ML	MIC	'Local' relates to local hills such as Pentlands, Moorfoots, Lammermuirs below 600 metres. Summer ML can operate on these hills during the winter months provided summer conditions prevail underfoot.
Rock Climbing – Single Pitch or Indoor Climbing Walls	SPA or Lothian Rock 3	MIA	SPA specifically excludes tidal crags e.g. Aberdour.

ACTIVITY	LEADER QUALIFICATION	TECHNICAL EXPERT	NOTES
Rock Climbing – Multipitch or Introduction of Leading on Single Pitch	MIA	MIC	
Gorge Walking (Dry approach)	Summer ML and site specific training	MIA	
Gorge Walking (Wet approach)	Summer ML or BCU Level 3 Coach plus Swiftwater Rescue Technician Level 1 plus Site specific training SCRAW training also advised.	BCU Level 4 Coach or SRA L4 Plus Swiftwater Rescue Advanced Technician	
Orienteering	BOF Instructor	N/A	BEL or ML acceptable for safety. In very simple environments, First Aid qualification and BOF teacher/leader certificate would be a minimum.
River Rafting	SRA Trip Leader	SRA Level 4 (Trainer)	
Kayaking – Sheltered Water: Fresh or Salty	BCU Level 2 Coach (Instructor)	BCU Level 3 Kayak Coach (Inland or Sea)	Sheltered waters are largely enclosed areas of flat sheltered water, free of strong currents and with easy, safe landing areas. Wind conditions must be moderate or less and where the area forms part of a larger expanse of water, the wind must not be blowing off-shore. Examples of suitable areas are canals, small lochs, sheltered bays, harbours and pools of slow moving rivers.
Kayaking – White Water up to Grade II	BCU Level 3 Coach (SI) Inland	BCU Level 4 Coach	
Kayaking – White Water to Grade IV	BCU Level 3 Coach (SI) with 5 Star (Inland) Advanced	BCU Level 5 Coach	

ACTIVITY	LEADER QUALIFICATION	TECHNICAL EXPERT	NOTES
Open Canoeing – Sheltered Water	BCU Level 2 Coach Open Canoe	BCU Level 3 Coach Open Canoe	As above
Open Canoeing – White Water up to Grade II and Journeys on large lochs	BCU Level 3 Coach Open Canoe	BCU Level 3 Coach with 5 Star	
Open Canoeing – White Water Grade III or above	BCU Level 3 Coach (SI) Canadian with 5 star Canoe (Advanced Proficiency)	BCU Level 5 Coach	
Sea Kayaking	BCU Level 3 Coach (SI) with 5 Star	BCU Level 4 Coach Sea	Simple coastal journeys with easy landings and free of strong tide races and/or overfalls and not involving extended open water crossings.
Sea Kayaking – Advanced	BCU Level 4 Coach (SI) Sea and 5 Star Sea (Advanced Proficiency)	BCU Level 5 Sea Coach	This covers tidal races, difficult landings or strong winds and open crossings.
Surf Kayaking	BCU Level 3 Coach Surf	BCU Level 4 Surf Coach	
Alpine Skiing	SNSC Alpine SL (formerly SPL)	N/A	Skiing in recognised and patrolled ski areas.
Alpine Skiing off-piste or ski mountaineering UK	SNSC Mountain SL	SNSCMSL	Off-piste Winter ML and SL acceptable. Ski mountaineering abroad would need Guides Carnet.
Nordic Skiing	SNSC Nordic SL	SNSCMSL	This is for day journeys in forests, low lying countryside and recognised ski areas with ski patrols.
Nordic Skiing – Mountains	SNSC Mountain SL	SNSC, MSL	

ACTIVITY	LEADER QUALIFICATION	TECHNICAL EXPERT	NOTES
Horse Riding (trekking only)	BHS Stage 2 or Trekking and Riding Society of Scotland Ride Leaders Certificate	Appropriate on-foot qualifications & Riding Centre Manager	Normally riding will take place from recognised stables with staff who hold the relevant qualifications.
Cycling	Cycle Ride Leader	Mountain Bike Leader	Local accreditation for specified, simple, risk-assessed routes
Trail Cycling	Trail Cycle Leader	Mountain Bike Leader	Trail cycling includes routes which are no more than 30 minutes walk from a refuge and no more than 600m in height.
Mountain Biking	Mountain Bike Leader	Mountain Bike Leader	Mountain biking includes routes more than 30 minutes from a refuge, more than 600m in height and more than one day's duration.
Windsurfing	RYA Level 1 Windsurfing Instructor Powerboat Level 2 Instructor	Instructor Level 2 and Windsurfing Principal	Normally sailing will only take place from recognised sailing bases which will provide supervision for the activity.

A Short Guide to the Personal Protective Equipment at Work Regulations 1992

Employers have basic duties concerning the provision and use of personal protective equipment (PPE) at work and this document explains what you need to do to meet the requirements of the Personal Protective Equipment at Work Regulations 1992 (as amended).

What is PPE?

PPE is defined in the Regulations as 'all equipment (including clothing affording protection against the weather) which is intended to be worn or held by a person at work and which protects him against one or more risks to his health or safety', e.g. safety helmets, gloves, eye protection, high-visibility clothing, safety footwear and safety harnesses.

What do the Regulations require?

The main requirement of the PPE at Work Regulations 1992 is that personal protective equipment is to be supplied and used at work wherever there are risks to health and safety that cannot be adequately controlled in other ways.

The Regulations also require that PPE:

- is properly assessed before use to ensure it is suitable;
- is maintained and stored properly
- is provided with instructions on how to use it safely, and
- is used correctly by employees.

Training

Make sure anyone using PPE is aware of why it is needed, when it is to be used, repaired or replaced and its limitations.

Train and instruct people how to use it properly and make sure they are doing this.

Because PPE is the last resort after other methods of protection have been considered, it is important that users wear it all the time they are exposed to the risk. Never allow exemptions for those jobs which take 'just a few minutes'.

Check regularly that PPE is being used and investigate fully any reasons why it is not.

Safety signs can be useful reminders to wear PPE.

Maintenance

Make sure equipment is:

- well looked after and properly stored when it is not being used, e.g. in a dry, clean cupboard, or in the case of smaller items, such as eye protection, in a box or case;
- kept clean and in good repair – follow the manufacturer's maintenance schedule (including recommended replacement periods and shelf lives). Simple maintenance can be carried out by the trained wearer, but more intricate repairs should only be done by specialists.

Make sure suitable replacement PPE is always readily available.

CE Marking

Ensure any PPE you buy is 'CE' marked and complies with the requirements of the Personal Protective Equipment Regulations 2002. The CE marking signifies that the PPE satisfies certain basic safety requirements and in some cases will have been tested and certified by an independent body.

European Health Insurance Card [EHIC]

You can apply for a European Health Insurance Card (EHIC) online, by phone or by post.

You can apply for an EHIC for your spouse/partner and any children up to the age of 16 (or 19 if they are in full-time education) at the same time as applying for your own. If you are a foster parent or guardian (including boarding school teaching staff), you can apply on behalf of any children you are looking after. You must be over 16 to apply as a main applicant.

Regardless of how you apply, you will need to have the following information to hand for everyone you are applying for:

- name and date of birth
- NHS or national insurance (NI) number

In Scotland the NHS number is known as the Community Health Index (CHI)

- Applying online
The quickest and easiest way to apply for an EHIC is online. Your card will be delivered within seven days.
<http://www.dh.gov.uk/PolicyAndGuidance/HealthAdviceForTravellers/fs/en>
- Applying by phone
To apply by phone, call 0845 606 2030 and have the information listed above ready. When your application is completed, your card will be delivered within 10 days.
- Applying by post
To apply by post, pick up the EHIC form and pre-addressed envelope from the Post Office. Your card will be delivered within 21 days. For a nominal fee, the Post Office will check your completed application form and forward it for processing. This service is optional.

There is space for up to four dependent children on the application form. If you apply online or by telephone, you can apply on behalf of more children.

Some people can only apply by post:

- People who do not have British, other EU, EEA or Swiss nationality legally residing in the UK are entitled to a UK-issued EHIC but can only apply by post. You will need to send a photocopy of your proof of entitlement to reside in the UK (i.e. the visa stamp from your passport or your Home Office letter) as well as your completed application form.
- Other people who are planning to live, work or study in an European Economic Area (EEA) country or Switzerland may also have to apply by post. See the 'Other circumstances affecting eligibility' section for more information.

If you are applying by post and you lose the pre-addressed envelope, send your completed application form to:

EHIC Applications
PO Box 1115
Newcastle upon Tyne
NE99 1SW

Minibus Checklist for Overseas Visits

Each vehicle requires the following:

- Waybill and Model control document (a book of translations of the Waybill).
- British Insurance Certificate.
- Green card (not necessary for many EU countries).
- Registration Document.
- MOT certificate (if required).
- Up-to-date tax disc.
- Calibrated tachograph with tacho cards, if fitted.
- Nationality (GB) plates.
- Identification Plate – chassis number.
- Warning triangle.
- Fire extinguishers.
- Spare set of bulbs.
- First Aid Kit.
- Head lamp beam deflectors.
- Spare tyre.
- Spare key.
- Tool kit and relevant spares.
- Bail Bond – Spain only.

Note:

- A completed Waybill for the vehicle must be carried out on the vehicle at all times. Duplicates are to be left in the book.
- At French border points, drivers must present the Waybill and get it **stamped**.
- All listed passengers must be present at all border crossings.

Minibus Good Practice Guide

- ✓ All mirrors clean and correctly positioned (legal requirement)
- ✓ Mirror X 3, signal, manoeuvre before change of speed or direction
- ✓ Be aware of 'blind spots' in the minibus
- ✓ Fold in external mirrors where necessary when parking – park at least 10 metres from junctions
- ✓ **ALL** doors must be **unlocked** when carrying passengers
- ✓ Exits and gangways must be kept clear of obstructions at all times
- ✓ All passengers must have clear gangway to **2 exits**
- ✓ Minibuses may use bus lanes unless sign says 'local buses only'
- ✓ It is possible to overload some minibuses carrying passengers and their belongings – check the minibus laden weight or consider using a trailer
- ✓ Know where emergency equipment is located (fire extinguisher, first aid kit etc)
- ✓ Ensure that the seatbelts and child restraints are appropriate to height and weight of children being transported
- ✓ Avoid using front seats to carry children wherever possible
- ✓ Lothian Community Transport Service recommends that Personal Assistants (Escorts) are used when transporting children
- ✓ Plan route and check condition of minibus before you set off. Ensure someone knows where you are going
- ✓ Report any accidents as soon as possible and **within 24 hours** to the Police

Petrol (fuel)

Oil (liquids)

Water

Electrics (lights, indicators, horn)

Rubber (tyres, windscreen wipers)

Glass (windows headlamps, mirrors)

**Information for Base Contact Person
(Category 2 [if out-with 'normal' hours], Category 3 and 4 Visits)**

It is a vital link in the safety management chain that the Base Contact Person has sufficient information to enable him/her to respond promptly and appropriately in case of emergency or simply to changes of plan or significantly delayed return.

Below is a check list of information that should be passed to the Base Contact prior to departure:

Names of participants	
Name & contact details of parents/carers	
Names and contact details for emergency contact	
Details of itinerary: Locations, dates and expected timings	
Travel details including flight numbers and/or coach company details	
Contact details for other contracted providers	
Full accommodation details of where group are staying	
24 hr contact details for Group Leader and other delegated staff member(s)	
Copies of medical information	
Copies of parental consent forms (PCs)	
Copies of emergency contact details for all staff on visit	
Copy of risk assessment	

EMERGENCY ACTION CARD – GROUP LEADER

Contact *(Establishment Name)*
 Fax 01
 Email

CALLS FROM ABROAD +0044

USEFUL NUMBERS

(Head of Establishment)

School/Base: 01

Daytime: 01

Home: 01

Mobile 07

Education and Children’s
 Services Division:
 Daytime: 0131 271 3718
 (Director’s Office)

(Other Base Contact)

School/Base: 01

Home: 01

Mobile: 07

MIDCON: 0131 271 3084 or
 0131 271 3018
State “Educational Emergency”

WARNING AND ADVICE IN AN EMERGENCY**Priorities**

1. Safeguard the group
2. Attend to victims
3. Prevent uncontrolled pupil use of mobiles, etc
4. Contact Base or Education and Children’s Services Division or MIDCON outside school hours: refer all enquiries there
5. Keep a written/taped record of all the facts
6. Preserve vital evidence: photos may help
7. Help with official enquiries
8. Avoid confrontations
9. Do not admit liability to anyone
10. Do not comment to the media: refer enquiries to Head of Establishment or Communications Manager

Midlothian Council - Education and Children's Services

Useful Contacts

Director, Education and Children's Services
 Midlothian Council
 Fairfield House
 8 Lothian Road
 Dalkeith
 EH22 3ZG
 Tel: 0131 271 3718
www.midlothian.gov.uk

Head of Education
 Midlothian Council
 Fairfield House
 8 Lothian Road
 Dalkeith
 EH22 3ZG
 Tel: 0131 271 3719
www.midlothian.gov.uk

Head of Communities & Support Services
 Midlothian Council
 Fairfield House
 8 Lothian Road
 Dalkeith
 EH22 3ZG
 Tel: 0131 271 3721
www.midlothian.gov.uk

Active Schools and Outdoor Learning Team
 Midlothian Council
 Penicuik Town Hall
 33 High Street
 Penicuik
 EH26 8HS
 Tel: 01968 664041-8
www.midlothian.gov.uk

Travel Team
 Midlothian Council
 Dundas Buildings
 62A Polton Street
 Bonnyrigg
 EH19 3YD
 Tel: 0131 561 5299
www.midlothian.gov.uk

Insurance Officer
 Midlothian Council
 Midlothian House
 Buccleuch Street
 Dalkeith
 EH22 1DJ
 Tel: 0131 271 3123
www.midlothian.gov.uk

Vehicle Maintenance Services
 Midlothian Council
 80 High Street
 Bonnyrigg
 EH19 2AE
 Tel: 0131 660 3486
www.midlothian.gov.uk

Health and Safety Team
 Midlothian Council
 Midlothian House
 Buccleuch Street
 Dalkeith
 EH22 1DJ
 Tel: 0131 270 7500
www.midlothian.gov.uk

Midlothian Ranger Service
 Vogrie Country Park
 by Gorebridge
 EH23 4NU
 Tel: 01875 821990
www.midlothian.gov.uk

Pentland Hills Ranger Service
 Boghall Farm
 Edinburgh
 EH10 7DX
 Tel: 0131 445 3383
www.edinburgh.gov.uk

Access and Woodland Officer
Midlothian Council
Dundas Buildings
62A Polton Street
Bonnyrigg
EH19 3YD
Tel: 0131 561 5386
www.midlothian.gov.uk

School Travel Plan Co-ordinator
Fairfield House
8 Lothian Road
Dalkeith
EH22 3ZG
Tel: 0131 270 7500
www.midlothian.gov.uk

John Fairgrieve
Duke of Edinburgh Awards Officer
Community Learning Team
Penicuik High School
39A Carlops Road
Penicuik
EH26 9EP
Tel: 01968 664107
John.fairgrieve@midlothian.gov.uk

Scottish Government
Education Department
St Andrew's House
Regent Road
Edinburgh
EH1 3DG
Tel: 0131 556 8400
www.scotland.gov.uk

Department for Transport
Great Minster House
76 Marsham Street
London SW1P 4DR
Tel: 020 7944 8300
www.dft.gov.uk

The Foreign & Commonwealth Office's Travel
Advice Unit
Consular Directorate
Old Admiralty Building
London SW1A 2PA
Tel: 0870 6060290
(Mon-Fri 9.30 - 16.00 hours)
Travel advice notices and leaflets are
available on BBC2 Ceefax pages 470
onwards and on the internet at
www.fco.gov.uk

Health and Safety Executive
Health and Safety Enquiries and contact
numbers for Local HSE Offices available from:
HSE Infoline

Tel: 08701 545500
or write to:
HSE Information Centre
Caerphilly Business Park
Caerphilly CF83 3GG
www.hse.gov.uk

Home Office
Immigration and Nationality Directorate
Lunar House
40 Wellesley Road
Croydon CR9 2BY
Tel: 0870 606 7766
www.ind.homeoffice.gov.uk

Department of Trade and Industry
1 Victoria Street
London SW1H 0ET
Tel: 0207 2155000

The Educational Institute for Scotland
46 Moray Place
Edinburgh
EH3 6BH
Tel: 0131 225 6244
www.eis.org

Scottish Secondary Teachers Association
15 Dundas Street
Edinburgh
EH3 6QG
Tel: 0131 556 5919
www.ssta.org.uk

NASUWT
6 Waterloo Place
Edinburgh
EH1 3BG
Tel: 0131 523 1110
www.nasuwt.org.uk

Professional Association of Teachers
Scotland
1-3 Colme Street
Edinburgh
EH3 6AA
Tel: 0131 220 8241
www.pat.org.uk

Headteachers Association of Scotland
University of Strathclyde
Jordanhill Campus
Southbrae Drive
Glasgow
G13 1PP
Tel: 0141 9503298

Association of Headteachers in Scotland
University of Dundee
Gardyne Road Campus
Dundee
DD5 1NY
Tel: 01382 458802
www.ahts.org.uk

Catholic Headteachers Association of
Scotland
John Ogilvie High School
Farm Road
Hamilton
ML3 9LA

Association of British Travel Agents (ABTA)
68-71 Newman Street
London W1T 3AH
Tel: 0207 637 2444
www.abta.com

The British Activity Holiday Association
22 Green Lane
Hersham
Surrey, KT12 5HD.
Tel/Fax: 01932 252994
www.baha.org.uk

British Association of Advisers and Lecturers
in Physical Education (BAALPE)
University College
Henwick Grove
Worcester
WR2 6AJ
Tel: 01905 855584
www.baalpe.org

British Council
10 Spring Gardens
London
SW1A 2BN
Tel: 0161 9577755 (Information Centre)

British Safety Council
National Safety Centre
70 Chancellors Road
Hammersmith
London W6 9RS
Tel: 0208 741 1231
www.britishsafetycouncil.org

British Schools Exploring Society
1 Kensington Gore
London SW7 2AR
Tel: 0207 591 3141
www.bses-expeditions.org.uk

Confederation of Passenger Transport UK
Imperial House
15-19 Kingsway
London WC2B 6UN
Tel: 0207 240 3131
www.cpt-uk.org

Community Transport Association(CTA)
Highbank
Halton St
Hyde
Cheshire
SK14 2NY
Tel: 0161 367 8780
www.communitytransport.com

The Maritime & Coastguard Agency
MCA Infoline
Tutt Head
Mumbles
Swansea
Infoline Tel: 0870 6006505
www.mcga.gov.uk

Medical Advisory Service for Travellers
Abroad (MASTA)
Moorfield Road
Leeds LS19 7BN Tel: 0113 238 7575
Travellers Health Line: 0906 8224 100
www.masta.org

National Association of Field Studies Officers
CEES Stibbington Centre
Church Lane
Stibbington
Peterborough PE8 6LP
Tel: 01780 782 386
www.nafso.org.uk

Royal Life Saving Society UK
River House
High Street
Broom
Warwickshire B50 4HN
Tel: 01789 773 994
www.lifesavers.org.uk

The Royal Society for the Prevention of
Accidents (Scotland)
Slateford House
53 Lanark Road
Edinburgh
EH14 1TL
Tel: 0131 455 7457
Fax: 0131 443 9442
www.rospa.com

School and Group Travel Association
Katepwa House
Ashfield Park Avenue
Ross-on-Wye
Herefordshire HR9 5AX
Tel: 01989 567 690

School Journey Association
48 Cavendish Road
London SW12 0DG
Tel: 0208 675 6636

Scottish Parent Teacher Council
53 George Street
Edinburgh
EH2 2HT
Tel: 0870 706 5814
www.sptc.info/

sportscotland
Caledonia House
South Gyle
Edinburgh EH12 9DQ
Tel: 0131 317 7200
www.sportscotland.org.uk

VisitScotland
23 Ravelston Terrace
Edinburgh EH4 3EU
Tel: 0131 332 2433
www.visitscotland.com

Loch Lomond and The Trossachs National
Park
National Park Headquarters
The Old Station
Balloch Road
Balloch
G83 8BF
Tel: 01389 722600
Fax: 01389 722633
www.lochlomond-trossachs.org

Cairngorms National Park Authority
14 The Square
Grantown-on-Spey
PH26 3HG
Tel: 01479 873535
Fax: 01479 873527
www.cairngorms.co.uk

Snowdonia National Park Authority
Youth and School Liaison Officer
Education Service
Plas Tan y Bwlch Study Centre
Maentwrog
Blaenau Ffestiniog
Gwynedd
LL41 3YU
Tel: 01766 772600

Suzy Lamplugh Trust
PO Box 17818
London SW14 8WW
Tel: 0208 8760305
www.suzylamplugh.org

Scottish Youth Hostel Association
National Office
7 Glebe Crescent
Stirling
FK8 2JA
Tel: 01786 891400
www.syha.org.uk

Midlothian Council - Education and Children's Services

Further Guidance

The Scottish Government

Health & Safety on Educational Excursions (HASEE) –
www.scotland.gov.uk/library5/education/hsee-00.asp

Learning and Teaching

Learning and Teaching Scotland – Outdoor Learning – Curriculum for Excellence -
<http://www.ltscotland.org.uk/outdoorlearning/index.asp>

Learning Outside the Classroom - <http://www.lotc.org.uk/>

Teaching Space – Scottish Natural Heritage - <http://www.snh.org.uk/TeachingSpace/>

Scottish Outdoor Access Code - <http://www.outdooraccess-scotland.com/default.asp>

Education Guardian - <http://www.guardian.co.uk/education/school-trips>

Forest Education Initiative - <http://www.foresteducation.org/country.php?ctry=s>

Royal Highland Education Trust - <http://www.rhet.org.uk/>

Health Promoting Schools - <http://www.ltscotland.org.uk/healthpromotingschools/>

Scottish Pre-School Play Association - <http://www.sppa.org.uk/>

Health and Safety Executive

Health and Safety on School Visits – Key Points -
<http://www.hse.gov.uk/schooltrips/keypoints/index.htm>

Adventure Activities Licensing - <http://www.hse.gov.uk/aala/index.htm>

A Guide to Risk Management - <http://www.hse.gov.uk/risk/index.htm>

Avoiding ill health at open farms: Advice to farmers with teachers supplement - Agricultural Information Sheet no.23 (revised 2002) - <http://www.hse.gov.uk/pubns/ais23.pdf>

Five Steps to Risk Assessment - www.hse.gov.uk/pubns/indg163.pdf

Managing Health and Safety: Five Steps to Success - www.hse.gov.uk/pubns/indg275.pdf

Myth of the Month - <http://www.hse.gov.uk/myth/index.htm>

Managing Health and Safety in Swimming Pools revised edition 1999 (HSC 179 £10.50)

Reducing Risk, Protecting People 2001

RIDDOR is the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 - <http://www.hse.gov.uk/riddor/index.htm>

National Governing Bodies/Organisations

The Mountaineering Council of Scotland - <http://www.mcofs.org.uk/home.asp>

Canoe Scotland - <http://www.canoescotland.com/>

Cycling Scotland - <http://www.cyclingscotland.org/>

Scottish Cycling - http://www.britishcycling.org.uk/web/site/SCU/scuhome/sc_home.asp

Royal Yachting Association (Scotland) - <http://www.rvascotland.org.uk/Pages/default.aspx>

Snowsport Scotland - <http://www.snowsportscotland.org/>

Others

The Administration of Medicines in Schools - Scottish Government Education Department - www.scotland.gov.uk/library3/education/amis-00.asp

For guidance on Farm Visits, see Scottish Government website - www.scotland.gov.uk/library5/health/ecsip-00.asp

Work Experience: A Guide to Promoting Quality and Work Experience: Case Studies of Scottish Schools - [www.ltscotland.org.uk/edresources/publications.asp?cat= pub&education key+Enterprise%20in%20Education](http://www.ltscotland.org.uk/edresources/publications.asp?cat=pub&educationkey+Enterprise%20in%20Education)

The Protection of Young People in the Context of Educational Visits: Guidelines for Organisers 2002 – Available from City of Edinburgh Council Children and Families Dept, Publications Unit, Level 1, Waverley Court, 4 East Market St, Edinburgh, EH8 8BG

Health Advice to Travellers Anywhere in the World - Available free from most Post Offices, travel agents and local libraries or Free Phone 0800 555777

Safe Practice in Physical Education - The British Association of Advisers and Lecturers in Physical Education - www.baalpe.org/publications.htm

Get Safe for Summer - Amateur Swimming Association - www.asa-awards.co.uk

Safety on British Beaches - Joint publication by the Royal Life Saving Society and the Royal Society for the Prevention of Accidents (RoSPA) £13.49. Available from RoSPA

Safe Supervision for Teaching and Coaching Swimming - Amateur Swimming Association and others. 2nd edition 2001 Tel: 01509 618700

Group Safety at Water Margins - Central Council for Physical Recreation - www.ccpr.org.uk

Minibus Safety: A Code of Practice - RoSPA and others 2002 - www.rospace.com/pdfs/road/minibus.pdf

Safe and Responsible Expeditions and Guidelines for Youth Expeditions - Young Explorers' Trust, c/o RGS-IBG Expedition Advisory Centre. £5 inc. p & p or free from website - www.rgs.org/eacpubs

Quality, Safety and Sustainability - Field Study Centres: A Code of Practice - National Association of Field Studies Officers (NAFSO) - www.nafso.org.uk

The Waterways Code (leaflet) and *The Waterways Code for Boaters* (video) are available from British Waterways - hq@britishwaterways.co.uk - Tel: 01923 201120

The Suzy Lamplugh Trust has produced a range of guidance on personal safety, including booklets, videos and training courses - www.suzylamplugh.org

Address details for listed Government publications

The Stationery Office

Tel: 0870 606 5566

Fax: 0870 606 5588

www.tso.co.uk

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PO Box 1999

Sudbury

Suffolk CO10 6FS

Tel: 01787 881165

Fax: 01787 313995

www.hsebooks.com