

# Outdoor Education, Visits and Off-Site Activities Health and Safety Policy

Devon County Council and  
Torbay Council establishments

**MARCH 2014**



# Foreword

This policy document seeks to ensure that all young people continue to benefit from opportunities to take part in safe, well managed visits and off-site activities. The responsibilities on all of us are considerable, but so are the rewards for young people.

The comprehensive guidance detailed in this document is designed to support everyone who is involved in the planning, management and delivery of visits and off-site activities, incorporating outdoor learning in its widest sense, and to do so in ways which reflect current good practice and our duty of care.

The format is essentially the same as the edition of Outdoor Education, Visits and Off-Site Activities produced for Devon County Council and Torbay Council in 2012, with minor changes to ensure it remains up to date.

March 2014

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## Key Changes from 2012 Outdoor Education, Visits and Off-Site Activities Document

- Form SOE5 has been updated in line with other south-west local authorities. In particular, there is a additional question on insurance disclaimer forms.
- Generic risk assessments, which can be adapted by schools and establishments, are provided on [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) and on Evolve [www.devonvisits.org.uk](http://www.devonvisits.org.uk)
- Web addresses have been updated.
- Clarification of the status and role of the group leader has been included throughout the document. See in particular section 2.1 page 18, 2.2 page 20.
- Definition of remote supervision has been extended. Section 3.17 page 30
- Use of External Providers and the continuing Duty of Care held by the school. See section 2.1 page 19; **3.15 page 29**; Safeguarding section 3.3 page 35; **Section 4.4 page 56**;
- Update to walking, camping and climbing awards
- Update of references from CRB to DBS

**Please note that the first point of contact for support through Evolve and for health and safety in outdoor education is:**

**Devon Health, Safety & Wellbeing Service, Devon County Council, Great Moor House, Bittern Road, Sowton Industrial Estate, Exeter, EX2 7NL**

**Tel.:01392 382027 Fax: 01392 381857**

**Email: [healthandsafety@devon.gov.uk](mailto:healthandsafety@devon.gov.uk)**

**Through an agreement between Babcock LDP and the DCC Health and Safety Team, LDP will continue to provide specialist outdoor education advice and support to DCC, maintained schools and subscribing academies, through Evolve, EVC training and the LDP website.**

## Summary

Devon County Council and Torbay Council recognise the significant contribution educational visits and off-site activities make to the development of young people. This document details the procedures that establishments must follow to comply with the health and safety policy of each Council. It is intended to support you and help ensure that all visits are organised with due care and reference to the safety of all.

**The document is designed to meet the needs of maintained schools and other Council managed establishments in Devon and Torbay. In addition, by prior formal agreement and where applicable, academies, independent schools and other establishments are also able to use the same documentation and procedures to inform their practice.**

A web based visit notification and management system called **Evolve** helps to secure effective arrangements for communication and management within schools and with the relevant local authority, where necessary. Establishments have a log-in to the site via the head and the educational visits co-ordinator (EVC). Other members of staff should contact their head or EVC for access to the site. Evolve also contains a data base with search

facilities, a reports section and ready access to other guidance documentation, resources and training provision. Find Evolve at [www.devonvisits.org.uk](http://www.devonvisits.org.uk)

While certain tasks may be delegated to establishments the local authority, where it is the employer, retains ultimate responsibility.

All establishments should develop their own educational visits policy. A model policy is available at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) Click on the policies and guidance section. Supplementary information about this guidance will be added to the Devon LDP web site and cross referenced through Evolve.

The arrangement between Devon County Council and Torbay Council to provide advice and support for health and safety for education visits and off-site activities is summarised at:

[www.torbay.gov.uk/index/education/out-of-school-activities/educationalvisits.htm](http://www.torbay.gov.uk/index/education/out-of-school-activities/educationalvisits.htm)

Find more information at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) or contact:

**Devon Health, Safety & Wellbeing Service, Devon County Council, Great Moor House, Bittern Road, Sowton Industrial Estate, Exeter, EX2 7NL**

**Tel.:01392 382027 Out of Hours Emergency Pager Service : 07659 146024**

**Fax: 01392 381857**

**Email: [healthandsafety@devon.gov.uk](mailto:healthandsafety@devon.gov.uk)**

The forms at the back of this booklet are designed to help you plan and manage off-site activities. Evolve allows forms to be completed and stored on line.

Copyright on this booklet is free to Devon and Torbay establishments. Copyright is also free to organisations which have formally subscribed and registered their participation in the use of this document.

# Planning checklist for visits and off-site activities

This checklist provides a summary of the main points which should be considered by the visit leader when planning a visit off-site. The checklist may be used as an aide-memoire by the visit leader or may be a formal record for the head or governing body. It may therefore be used by the head to decide whether to give approval for a visit.

Completion of an Evolve visit form will help to take you through these steps.

The checklist is designed to help the head, EVC and the visit leader ensure:

- the health, safety and well being of young people and staff, including volunteers
- young people gain the maximum educational benefit from the visit or activity
- effective management, planning, organisation and leadership
- compliance with policies and statutory requirements.

**1. Visit leader** (see Section 2.1)

- Is there a clearly identified visit leader, sufficiently experienced and competent to assess the risks and manage the proposed visit or activity? Will the visit leader be present throughout the visit, or is the supervision delegated? If the latter, has section 4.41 been followed?

**2. Purpose** (see Section 1.1)

- Is there a clearly identified purpose for the whole programme and any of its constituent parts, appropriate to the age and ability of the group?

**3. Risk assessment** (see Section 2.4)

- Has the visit leader assessed the risks involved in all aspects of the visit or activity and recorded the significant findings, or made reference to a previous record, with amendments as necessary? See Form SOE6 and generic risk assessments at [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)
- Are the staff involved in the visit sufficiently able and experienced to re-assess risks on an on-going basis throughout the programme?

**4. Preliminary visit**

- Has the visit leader made a preliminary visit to the site or centre to be visited, to check arrangements? These include; travel time, access and permission, facilities and equipment, leisure or recreational facilities for residential stays, staff support, guides or programmes of work, potential health and safety issues, shelter, toilets, costs, accommodation, contingency arrangements, references from previous users.
- If no pre-visit has been carried out, has action been taken to



ensure the visit leader is aware of potential hazards and opportunities?

**5. Location**

- Is the proposed location of the visit suitable for the activity being done and appropriate for the group?

**6. Advice**

- Has advice been sought from someone with expertise or technical competence where there is uncertainty about safe practice? This may be the EVC, an external technical expert, or the adviser for outdoor education.

**7. Approval** (see Section 2.5)

- All visits must be approved by the head or the EVC acting on behalf of the head. Does the proposed activity involve:
  - adventurous activities (category B) or a visit abroad (category C)? If so, in addition to approval from the head the visit may also need to be endorsed by the adviser for outdoor education via Evolve.

**8. Venue and use of External Providers**

- Does the visit involve adventurous activities booked through a commercial, charitable or private provider? If so, see Section 4.4. You may need to forward a copy of Form SOE5 in Section 5 to the provider to confirm that they meet expected standards.

**9. Staff** (see Section 3 and Section 4)

- Are members of staff, including volunteers, suitably competent – experienced, qualified and able – to supervise the individuals and groups they are responsible for, in that environment?
- Are members of staff, instructors or volunteers leading adventurous activities suitably competent to do so?
- Do members of staff have sufficient knowledge of young people for who they are responsible?
- Have members of staff or adult volunteers been DBS checked, where necessary? (see Section 3.3)

**10. Staff to young people ratio** (see Section 3.1)

- Will the group have the acceptable staff to young people ratio necessary for the activities proposed?
- Do plans and staffing ratios reflect the needs of anyone with a disability or needing extra support?
- Does staffing include male and female supervision, where necessary?
- Does the staffing ratio reflect any possible conflict of interest for staff whose own children are on the trip?

**11. Parental and guardian consent**

(See Section 3.8 and Forms SOE3 and SOE3a )

- Have parents and guardians given their informed consent for the visit as a whole and for any adventurous activities which are planned?

**12. The programme**

- Do young people and staff have the appropriate clothing and equipment necessary for the activities proposed, allowing for a range of weather conditions?
- If not, will an external provider be offering appropriate equipment?
- Are the young people prepared for and physically capable of taking part in the proposed activity?
- Is the programme suitable for all of the participants?
- Is there an alternative programme (a Plan B) in the event of poor weather, or other necessary change and have the risks related to Plan B been considered?
- Does the programme reflect a responsible attitude towards the environment?

**13. Organisation** (see Section 3)

- Are staff aware of dietary and medical needs of young people and staff?
- Have suitable and sufficient arrangements been made for first aid? (see Section 3.2)

**14. Transport** (see Section 3.5)

- Is appropriate and legal transport available?
- Are there suitable and sufficient qualified and DBS checked drivers for any planned minibus journey?
- Will departure and return times be made known to staff, young people and parents?
- Is there a contingency plan in the event of a delay or early return?

**15. Insurance and finance** (see Section 3.4 and Section 3.6)

- Is there adequate and suitable insurance cover? (see Section 3.4)
- Have arrangements been made to finance the visit and manage the associated funds? (see Section 3.6)

**16. Briefing for young people**

Will the young people be properly briefed on the activities they will do during the visit? The briefing may need to include:

- appropriate clothing and equipment
- rendezvous procedures
- safety risks of jewellery

- groupings for study or supervision
- a system of recall and action in emergencies
- agreed codes of conduct and behaviour
- significant hazards, including water
- relevance to prior and future learning

**17. Briefing for staff**

- Will the visit leader also brief adults and voluntary helpers?  
The briefing may need to include:
  - anticipation of hazards and the nature of the programme
  - defining roles and responsibilities of staff
  - careful supervision to cover the whole time away
  - arrangements for any indirect supervision where applicable
  - standards of behaviour expected from young people
  - regular counting of participants
  - how much help to give to young people in their tasks
  - a list of names of people in sub groups
  - emergency procedures.

**18. Emergency procedures** (see Section 3.9)

- Has a named emergency contact been identified at home or at base in the event of an emergency, who has a contact list of the group members including staff and a programme of the group's activities? For out of work hours, two emergency contacts should be identified.
- Are the staff sufficiently aware of emergency and accident procedures and do they have access to relevant emergency and group home contact numbers?

**19. Preparation and communication**

- Is there adequate time and opportunity to prepare for the visit or activity?
- Have other staff and colleagues whose work may be affected been notified of planned arrangements?

**20. Follow up**

- Have arrangements been considered for appropriate follow up work and evaluation after the visit?
- Has a report been provided for the head or other colleagues, where appropriate, to share outcomes arising from the visit and learn from problems or incidents?
- Have other records been completed, for example those related to vehicles or equipment?
- Have financial records been completed?

# Section 1

## Introduction

'Every child and young person should have opportunities to experience the world outside the classroom and take part in residential programmes to stimulate, inspire and bring learning to life. This should be an integral part of their learning and development, complementing learning in the classroom.'

Changing Our Futures, Devon County Council, 2007

A copy of the document is available at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)

### 1.1 The value of outdoor education

Outdoor education helps young people to:

- acquire skills which promote well-being and healthy lifestyles into adulthood
- develop knowledge and understanding about risks to promote their own and others' safety
- enjoy and achieve as a result of opportunities to develop as successful and confident learners
- gain a heightened awareness of the local and global environment and our role within it
- gain and apply key skills including leadership, team working and decision making, so that they are better able to achieve economic wellbeing.

In November 2006 the DCSF launched a **Learning Outside the Classroom Manifesto** through which commitment by them and other bodies at that time has been emphasised:

'Every young person should experience the world beyond the classroom as an essential part of learning and personal development, whatever their age, ability or circumstances. Learning outside the classroom is about raising achievement through an organised, powerful approach to learning in which direct experience is of prime importance. This is not only about what we learn but importantly how and where we learn.'

### 1.2 Equal Opportunities

Outdoor education, visits and off-site activities should be available and accessible to all who wish to participate, irrespective of gender, religion, ethnic origin, social background, medical need or physical ability. All young people should be encouraged to participate in as wide a variety of visits and activities as possible.

Planning for visits and activities must take account of the Special Educational Needs (SEN) and Disability Act, 2001 and The Disability Discrimination Act 2005. Schools should seek to anticipate the needs of pupils who are disabled as well as the needs of specific pupils. Specifically, schools must not:

- treat a disabled pupil or prospective pupil less favourably than another for a reason related to their disability and without justification
- fail, without justification, to take reasonable steps to avoid placing disabled pupils at a substantial disadvantage in comparison with their non-disabled peers.

In essence disability legislation requires schools to:

- plan ahead to meet the needs of all disabled pupils
- identify potential barriers to inclusion
- work collaboratively with disabled pupils, their parents and others
- identify practical solutions through a problem solving approach
- ensure that staff have the necessary skills to respond effectively
- monitor the effects of adjustments on a pupil's progress.

Find more information about **The Disability Discrimination Act 2005** and implications for managing educational visits and off-site activities at:

[www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) See the section on supplementary guidance.

Find more information from the Dept. for Education:

<http://www.education.gov.uk/schools/leadership/governance/guidetothelaw/b0065507/gttl/vulnerable-children/disability-discrimination>

## 1.3 The legal framework

Responsibility for health and safety is shared between the parties involved in managing any programme of work or activity. The level of responsibility relates to the level of control. However, ultimate responsibility rests with the employer. In the case of schools, who the employer is varies:

- For community schools, community special schools, maintained nursery schools and pupil referral units the employer is the local authority.
- For foundation schools, foundation special schools and voluntary aided schools the employer is usually the governing body. This is also the case with Trust Schools.
- For academies, the governing body is usually the employer.
- For independent schools, the proprietor is the employer.

The local authority is the employer for statutory youth groups.

### 1.31 *The 1974 Health and Safety at Work Act*

*The 1974 Health and Safety at Work Act* requires employers to do all that is reasonably practicable to ensure the health, safety and well being at work of employees and non-employees, including young people, who are affected by their work. This includes off-site activities.

The 1974 Act and associated regulations including The Management of Health and Safety at Work Regulations 1999 require that employers:

- produce a health and safety policy linked to risk assessment
- have in place systems for reporting accidents and incidents
- produce and implement risk assessments
- develop measures to control those risks including training and providing information
- appoint people competent to carry out specific tasks

- develop emergency procedures
- monitor and review procedures and practice.

This policy document summarises the procedures which should be followed by council employees in managing outdoor education, visits and off-site activities.

Under the same legislation employees, including volunteers, should:

- take reasonable care of their own and others' health and safety
- co-operate with their employer over safety matters
- carry out activities in accordance with training and instruction
- inform the head, manager or visit leader of any serious risks.

### 1.32 Duty of Care

Both organisations and individuals who assume a responsibility for the supervision of young people take on a legal Duty of Care. This duty is continuous during any visit or off-site activity and cannot be delegated. The law does not expect perfection but simply reasonable care, in accordance with that expected of an averagely responsible fellow professional.

There is a "higher duty of care" on teachers and other professional staff because of the role they carry out and the greater knowledge they are assumed to have of young people and specialised activities. The level of judgement expected of staff is related to that individual's knowledge, experience and training.

Common law indicates that the age of the young person and the nature and location of the activity are factors in determining the degree of supervision required. Staff should consider the known patterns of behaviour of particular pupils or young people. Any action should be in line with developed and accepted practice.

## 1.4 The scope of the policy

This booklet applies to staff and volunteers working in all Devon County Council and Torbay Council establishments.

The policy also applies to non council establishments which are subject to council registration or inspection. These establishments are expected to work to equivalent standards to those outlined in this booklet.

**We recommend that, in schools where the governing body is the employer, this policy is formally adopted and the same procedures are followed. If such schools do not use the council's policy and procedures they should ensure that equally robust systems are in place.**

A model policy for managing outdoor education, visits and off-site activities at establishment level is available at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)

Click on *policies and guidance*.

This booklet applies to all aspects of outdoor education, visits and off-site activities. It includes activities which are overtly hazardous and those where the risk is small. It includes all elements of those programmes including the journey and any residential element.

Although the principal application of this Policy will be within Devon schools, this Policy applies across all services of the Authority.

This policy will also apply to organisations, including academies, which have formally contracted with the Learning and Development Partnership in their use of the booklet and associated advice, information and training. Those in charge of young people or adults outside the direct responsibility of the local authority, including non-statutory youth groups and independent schools may also find this guidance useful.

## 1.5 Work experience

This policy does not cover work experience for which separate arrangements apply. Please note that school journey insurance cover for off-site activities does not apply to work experience.

## 1.6 Terminology

In this policy terminology has been adopted to incorporate the variety of people the booklet is addressed to and the range of activities involved.

**Council** – This is a combined policy document so unless there is reference to one specific council in the text or the meaning needs additional emphasis, the term council relates to both Devon County Council and Torbay Council.

**Local authority (LA)** – This term applies to both Devon County Council and Torbay Council, unless there is specific reference to one local authority.

**Governors** – members of school and college governing bodies. It also includes members of management committees and other formally constituted groups which have delegated or devolved responsibility.

**Head** – the head teacher or principal of the establishment or the line manager the visit leader is responsible to and whose approval is normally needed for an activity to go ahead.

**Educational Visits Co-ordinator (EVC)** – a member of staff carrying out specified functions on behalf of the head, principal or manager in order to assist with the planning and managing of educational visits and off-site activities.

**Young people** – the participants, pupils or group members the activities are provided for. They will normally be under the age of 18. The word pupil is used where the context is appropriate.

**Parents** – includes guardians or carers where these terms are more appropriate.

**Visit leader** -the person who has overall responsibility to the Head for the whole group. A number of group leaders may be answerable to the visit leader.

**Group leader** – the person who is directly responsible for managing a group engaged in a particular activity, perhaps a teacher, youth worker or volunteer.

**External Provider / Contractor** – an organisation contracted by the school / setting to provide activities, accommodation, tours or expeditions for young people. Robust checks and clear contracts must be in place. Schools have a non-delegable duty of care and remain responsible for their pupils even when using an external provider. See Section 2 and Section 4.4

**Instructor or Coach** – the responsibility for supervision and the delivery of an activity may be delegated to a specialist instructor or coach, because of their specific competence in an activity. The group leader or visit leader has a responsibility to discuss any concerns they may have regarding safe practice with the instructor and, ultimately, to withdraw members of the group from that activity if they are not confident of the safety standards which are operating. The school continues to hold the duty of care, even when using an instructor or coach. Clear contracts and robust checks must be in place.

**Off-site activities** – This includes all aspects of outdoor learning, visits and residential experience which take place away from the school or normal working environment.

**School** – The school or establishment and which is typically responsible for the young people taking part in an activity and within which the visit leader works. This includes any other settings such as Children’s Homes, Fostering teams, Youth Offending Teams, Social Service settings.

**For Duke of Edinburgh’s Award purposes:**

- The **award officer** is the person designated by the operating authority to be responsible for all aspects of Award operation by and within the organisation.
- The **assessor** is an appropriately qualified, experienced or accredited individual, approved by the operating authority, who confirms whether participants have fulfilled the conditions and requirements of a particular section of the Award.
- The **leader** (or unit leader) is a person who co-ordinates, monitors and advises young people in their Award Group.
- The **supervisor** is responsible for supporting the participants in a particular section of the Award. In the expeditions section the supervisor is responsible to the operating authority for the safety and wellbeing of the young people during their practice and qualifying ventures. (See Section 4.6)

## 1.7 Guidance from the Department for Education

The Department for Education provides guidance on the health and safety of pupils on educational visits.

<http://www.education.gov.uk/schools/adminandfinance/healthandsafety>

## 1.8 Guidance from the Health and Safety Executive

The HSE provides guidance on the health and safety of pupils on educational visits.

<http://www.hse.gov.uk/services/education/>



# Section 2

## Planning and management

### 2.1 Roles and responsibilities

#### The local authority

The local authority will:

- make this policy document available via the web to all establishments working within the LA, including maintained schools, and to the Duke of Edinburgh's Award
- monitor and endorse proposals for specified types of visit
- provide training related to managing off-site activities
- provide access to information and advice
- establish points of contact in the event of an emergency
- maintain specified insurance cover for maintained schools
- monitor and review safety for off-site activities.

#### The governing body - schools and colleges

The governing body should agree a policy for managing off-site activities. This may be done by endorsing the use of this policy. A model policy for governing bodies to use is available at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)

The governing body policy should include reference to school-based or local procedures for:

- authorising off-site activities
- providing training and information
- managing any significant provision which is particular to the school such as a residential centre or minibus
- action in an emergency arising from visits and off-site activities
- reporting accidents and incidents
- monitoring and reviewing policy and practice.

It is recommended that:

- the head (or delegated senior member of staff such as the Educational Visits Co-ordinator) authorises all off-site visits and activities
- the head provides a regular report to the Governing Body summarising the range of proposed visits and off-site activities and those which have taken place.

#### The head

The head should ensure that planning and managing off-site activities complies with the policies of the LA and the school.. The head may delegate this function to a senior member of staff acting as the EVC or keep the function personally. However, responsibility in both cases rests with the head and with the governing body. The head should give particular attention to ensuring that:

- the visit leader and additional staff are sufficiently experienced and competent to assess the risks and manage the visit or activity for the specific group they are responsible for, and that suitable child protection measures are in place, including vetting at an appropriate level for any voluntary helpers.

- risks have been assessed, appropriately recorded and safety measures put in place.
- procedures for approving off-site activities are followed.

For additional reassurance the head may ask the visit leader to show that the planning checklist has been followed.

### **The educational visits co-ordinator**

A school's EVC may be the head or a senior member of school staff appointed by the head and acting on their behalf. Overall responsibility rests with the head. The EVC should be specifically competent and trained for the task. The EVC should have practical experience in leading and managing a range of visits similar to those typically run by the establishment. Where this is not the case the head must reasonably limit the extent to which the function of the EVC is delegated. The EVC will be the principal contact with the LA over planned visits.

The EVC should work within the functions delegated by the head together with visit leaders involved in visits and off-site activities and other staff to help ensure:

- educational visits follow the policies and procedures of the LA and the school
- the management of visits and off-site activities is informed by an appropriate risk assessment
- approval arrangements are satisfactory and based on safe practice and clear educational objectives
- staff have access to advice and information
- leaders and staff meet identified standards and are competent to lead and support particular visits and activities
- relevant training, induction and other Continuous Professional Development opportunities are provided
- procedures are in place to inform parents and for them to give consent
- emergency arrangements are in place for visits and off-site activities, including contingency plans or a "Plan B".
- there is a system to keep and review records of visits, accident and incident reports
- systems are monitored and reviewed. This may include accompanying visits on a sampling basis.
- External providers / contractors / coaches have a clear contract, and robust checks have been made.
- Visit evaluation is completed in line with establishment policy.

The EVC should seek to maintain opportunities for young people to engage in a wide range of safe, high quality visits and off-site activities through a clear and robust approach to managing health, safety and welfare.

### **The visit leader**

The visit leader has overall responsibility for the supervision and conduct of the visit or activity and should be approved by the head or EVC acting on the head's behalf. The visit leader must be an employed qualified teacher, youth worker or social worker. The visit leader remains responsible even when they are not present on the visit, or not present for parts of the visit. This would be a form of "remote supervision". See sections 3.17. In particular the visit leader should:

- get approval from the head or EVC before any off-site visit or activity takes place.

- follow policy guidelines and regulations of the LA and the governing body
- assess the risks involved and amend any previously recorded risk assessment as appropriate
- consider the planning checklist in this booklet to ensure all procedures are being followed
- inform parents about the visit and gain their consent where appropriate
- reassess risks while the visit or activity takes place and act on that assessment.
- Provide relevant information to other staff, including any external contractor, about their roles and duties, the nature of the visit, location, and participants.
- Ensure that all staff and any external provider have access to emergency contact and emergency procedure details.
- Agree a clear working relationship with any external providers, including clear hand over of supervision. See also section 4.41.

### **Additional members of staff and volunteers**

Members of staff, volunteers and parent helpers should:

- assist the visit leader to ensure the health, safety and wellbeing of all young people and adults on the visit, including any special needs or requirements of the participants.
- be clear about their roles and responsibilities while taking part in a visit or activity and carry out that role in an appropriate manner.
- Be clear about emergency contacts and details
- Be clear about the hand over arrangements with any external providers

### **External Providers or contractors, including tour operators and expedition providers.**

These are third parties contracted to provide an activity, tour, visit or expedition, and who are not employed members of school staff.

- The school retains the Duty of Care at all times when using an external provider. The direct supervision of pupils may be delegated to the provider.
- All external providers must have a clear contract with the school, and be subject to robust checks. At a minimum, every provider must complete the SOE5 form, UNLESS they already hold the Learning Outside the Classroom Quality Badge. See section 4.4 for more details.
- Schools using external providers must check that all licences, (including any Adventure Activity licence) and insurance policies are up to date at the time of the visit.

### **Young people**

While taking part in off-site activities young people also have responsibilities which they should be made aware of by the visit leader or other members of staff, for their educational development, their own health and safety and that of the group. Young people should be involved, at an appropriate level, in the planning and managing of visits and activities including risk assessment. Young people should:

- not take unnecessary risks
- follow instructions of the visit leader and other members of staff
- behave sensibly, keeping to any agreed code of conduct
- inform a member of staff of significant hazards.

## Parents

Parents have an important role in deciding whether any visit or off-site activity is suitable for their child. Parents should:

- inform the visit leader about any relevant significant medical, psychological or physical condition
- provide an emergency contact number
- sign the consent form.

## 2.2 Competence to lead

The single most important factor in ensuring the safety of participants involved in a visit or activity is the competence of the visit leader.

When assessing the competence of a member of staff to lead a visit the head or the EVC should consider these questions.

- What is the reason for the visit?
- Is the leader an employee of the LA?
- Does the leader have a sufficient understanding of their responsibilities?
- Does the leader have the necessary organising ability?
- Is the leader competent in risk assessment and risk management?
- Does the leader have suitable prior knowledge of the young people they will be responsible for?
- Does the leader have sufficient experience of leading similar visits?
- Does the leader have appropriate qualifications, is suitably up to date and fit to lead the programme?
- Where an external provider is used, has the visit leader agreed a clear contract, including for the supervision of the young people?
- Where the visit leader will not physically accompany the group, have appropriate measures been put in place to supervise the young people? This is a form of “remote supervision”. See sections 3.17 on remote supervision, and 4.4 on External Providers

## 2.3 Monitoring

The head and the EVC should ensure that there are suitable arrangements to monitor educational visits and off-site activities so that they have a sound picture of practice during those visits and activities. This may include:

- more detailed discussion with the visit leader and other staff about proposed plans on a sample basis
- identifying a senior member of staff who may accompany visits on a sample basis to observe some or all of the provision, to help identify areas of good practice and areas for improvement
- reviewing the outcome of visits with the visit leader to discuss outcomes and any incidents which may have occurred.
- External providers should also be monitored, especially those that provide programmes for pupils when there are no employed school staff present. In these cases, the monitoring should include the observation of the programme delivery on at least a sampling basis.

## 2.4 Risk assessment

**The risk assessment of off-site visits and activities is simply:**

- the careful identification of what could go wrong or cause harm during the visit
- making a judgement – assessing the risks – to see whether the planned precautions reduce the risk of significant harm to an acceptable level
- determining what else may need to be done if the risk has to be reduced further.

The risk assessment process forms the backbone of planning any educational visit. Risk assessment is a legal requirement. It is also a process that promotes good practice.

Every educational visit must be subjected to a risk assessment process. The complexity of the risk assessment, and the method of recording the risk assessment, will vary according to the nature of the visit. In every case where there is a significant risk, documentary evidence should exist to show that a proper assessment of the risks involved has been made and precautions identified to reduce the risks to an acceptable level.

A primary objective of most outdoor activities and educational visits is to enable young people to achieve realistic challenges and to give them the opportunity to take responsibility for themselves. Young people should be involved in the risk assessment and planning process. See [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)

For local, low risk (Category A) visits a generic risk assessment is sufficient, without the need for a specific written risk assessment for each separate visit. This generic assessment may be a stand-alone document or could be included in another school procedural document such as a school handbook or policy where agreed risk control arrangements for regularly occurring low risk visits are clearly described.

The above web site and the Devon Visit (Evolve) websites contain sample generic risk assessments. Schools may find these useful starting points to develop a bank of risk assessments to support their own outdoor education, visits and off-site activity programmes. In addition, the website and this policy document include a standard template (SOE6) which may be used to keep a record of a risk assessment, together with a series of prompts.

For Category B (adventurous activities) and Category C visits (abroad), each event or visit should have its own specific recorded risk assessment, signed and dated by the visit leader. Nevertheless, one assessment record could apply to a series of events, such as a series of visits undertaken over a term for example. Moreover, a specific risk assessment can be re-used for subsequent visits, so long as the visit leader checks that it is still sufficient and no additional control measures need to be added in light of key differences for example, the time of year, the particular pupils undertaking the activity. The assessment will still need to be signed and re-dated for the new visit.

Whatever the visit category, the risk assessment process should continue during the visit. This ongoing process of risk assessment is sometimes referred to as 'dynamic risk assessment'. This involves professional judgements by all those involved in the visit in response to changing circumstances during the visit. The ongoing risk assessment involves staff monitoring the control measures and adapting or confirming them as required. These ongoing decisions will determine the safety of the group and the success

of the activity. Needless to say, it is not expected that leaders write down this ongoing risk assessment.

#### **2.41 Risk assessment: using an external provider**

Visit leaders do not need to see the detailed risk assessment produced by an external provider if you are confident about the overall management of that provider. Holding the Learning Outside the Classroom (LoTC) Quality Badge and completion of Form SOE5 helps you to confirm standards are appropriate. See section 4.4. One significant exception to this concerns overseas expeditions, where it is recommended you look through the detailed risk assessment produced by the provider.

However, the visit leader should ensure that the areas of the visit that they remain responsible for are subject to a risk assessment. Typically, this will include travel, supervision alongside instructors, and outside activity sessions, including overnight. Any teacher lead activities, and the particular needs of individual pupils, should also be included. A generic risk assessment / standard school procedure may cover this, otherwise an event specific assessment should be produced.

## **2.5 Approval procedures**

All visit leaders undertaking off-site activities with young people as part of their work with the local authority should follow the system of approval outlined below.

- For any off-site activity the approval of the head, or EVC as the delegated member of staff, is required. The establishment must keep a record of these visits and details may be requested by the LA as part of its statutory supporting and monitoring role. We recommend that these details are held on Evolve.
- Plans for activities in Categories B and C must also be endorsed by the adviser for outdoor education via Evolve on behalf of the LA where the LA is the employer or where the governing body is the employer and formally adopts this policy. This requirement also applies to Academies and other establishments who subscribe to Babcock LDP for this service. This ensures that suitable monitoring may take place and complies with the LA's insurance procedures.
- For the Duke of Edinburgh's Award Scheme in Devon there is a separate system of endorsement for activities which take place as part of the scheme, based on the same activity guidelines and regulations - see Section 4.6: Notification of D of E events is through Evolve.
- All staff and volunteers who have regular or unsupervised access to young people must be DBS checked.

These arrangements also apply to the supervision of group members over the age of 18 where deemed appropriate by individual establishments.

There are three categories of activities and associated approval.

Category	Examples of programmes	Approval procedure
A	<p>Day visits not involving adventurous activities</p> <p>Residential visits not involving adventurous activities</p> <ul style="list-style-type: none"> <li><i>This includes; visits, journeys, sporting and physical education activities and environmental studies for which the element of risk is similar to that encountered in daily life. Examples include farm visits, forest schools, visits to sites of historic, commercial or cultural interest, most fieldwork, leisure centre visits, ice skating, local walks, journeys to the zoo or theatre.</i></li> </ul>	<ul style="list-style-type: none"> <li>Approved by the head or delegated to EVC</li> </ul>
A	Use of outdoor and residential centres managed by DCC, such as Haven Banks or LDP such as Pixies Holt and the Dartmoor Training Centre	<ul style="list-style-type: none"> <li>Approved by the head or delegated to EVC</li> </ul>
A	Physical education and activities provided as part of PE lessons.	<ul style="list-style-type: none"> <li>Approval by the head or EVC</li> </ul>
B	<p>Adventurous activities - residential or non-residential</p> <ul style="list-style-type: none"> <li><i>Outdoor and adventurous activities including those listed below</i></li> </ul>	<ul style="list-style-type: none"> <li>Approved by the head or delegated to EVC</li> </ul> <p><b>and</b></p> <ul style="list-style-type: none"> <li>Endorsed by the adviser for outdoor education on behalf of the LA via Evolve</li> </ul>
C	<p>Overseas and other provision</p> <ul style="list-style-type: none"> <li><i>All visits abroad.</i></li> <li><i>Activities in the air – except commercial flying</i></li> <li><i>Any other activity or programme where there is significant concern about safe practice.</i></li> </ul>	<ul style="list-style-type: none"> <li>Approved by the head or delegated to EVC</li> </ul> <p><b>and</b></p> <ul style="list-style-type: none"> <li>Endorsed by the adviser for outdoor education on behalf of the LA via Evolve</li> </ul>

**Where the governing body is the employer, the governing body must decide whether the council's policies and procedures will be followed or must ensure equally robust alternative arrangements are in place.**

## Category B

- Category B activities may take place in hazardous or remote environments and require specific skills, experience and safeguards in order to contain risk at an acceptable level. Approval within the school and endorsement by the local authority will normally only be given where activity leaders are appropriately qualified and experienced. In addition to technical competence, recognised by qualification, the head should be satisfied that the individual has adequate non-technical skills and judgement to supervise or manage the group in question.

### Category B activities include:

Camping more than 30 minutes away from shelter or habitation	Canoeing, kayaking, stand up paddle boards
Caving	Coastal and off-shore cruising
Cycling more than 30 minutes away from shelter or habitation (walking distance)	Power boating, rowing, sea fishing from a boat
Horse riding or pony trekking where a riding school or trekking centre is not used	Sailing, windsurfing and kite surfing
Mountain and moorland activities more than 30 minutes away from shelter or habitation	Bushcraft, woodland activities, Forest School and Earth Education.
Rock climbing, including abseiling, on natural crags or using climbing walls which are not on school sites	Snorkelling and sub aqua in the sea or open water
Gorge walking, coasteering or similar combined water and rock activities	Surfing
Snow sports in UK and abroad, including dry slopes	Water skiing, jet skiing
High level ropes courses	Swimming other than in a public pool
Paintball activities	Shooting and archery
Motor sports	Rafting and improvised raft building

See the information on adventurous activities in Section 4.5

## 2.6 Time scales for endorsement by the local authority

Where LA endorsement of plans is required, (for Category B and C activities) details should be provided via EVOLVE:

- at the planning stage for overseas expeditions, before a contract is agreed with any external company
- three months or more in advance for visits abroad
- two months or more in advance for residential visits which involve adventurous activities
- at least two weeks in advance for non-residential adventurous activities.



## 2.7 Evolve

Notification of school trips and visits is done through a web based system, EVOLVE. Evolve is software that supports visit planning, notification and approval within schools and establishments, and with LA / Babcock LDP. All Cat B and C visits **must** be notified through Evolve. Schools are also encouraged to notify all Category A visits (approved within the establishment) through Evolve, so that the establishment has all trips and visits in one place, using one common system. Where Evolve is NOT used for Category A visits, the establishment must ensure that an equally robust system is used, and records are kept.

Evolve enables schools more easily to:

- share information within the establishment
- share information with the LA
- learn from other schools' use of external providers
- build a record of visits and activities carried out each year
- reduce paperwork
- simplify and speed up approval and endorsement processes
- assist record keeping
- manage health and safety requirements in this area.

Training on Evolve takes place as part of EVC training. EVC training courses take place every year. Contact for dates of forthcoming courses.

Find more information at: [www.devonvisits.org.uk](http://www.devonvisits.org.uk).

**For assistance with the Evolve system from please contact the Devon Health and Safety Helpline on 01392 382027  
or via email: [healthandsafety@devon.gov.uk](mailto:healthandsafety@devon.gov.uk)**

# Section 3

## Organisation

### 3.1 Supervision

There are many variables which govern appropriate staffing ratios. The following ratios apply to supervising young people under the age of 18 and should be seen as minimum figures. They should not normally be exceeded except where examples are specified. The critical factors are to ensure there is an appropriate level of supervision, informed by risk assessment of the individual visit, taking account of the special needs of any individual young person. (Also see Section 2.5 - Approval procedures.)

#### **All visits:**

##### **Early Years – from 0 - 5 years old:**

For outings, the staffing ratio must be within that which is required in the school or setting and will typically need to be an improved ratio. For further information see Section 3.12 below and links to the Early Years Statutory Framework.

##### **5 - 8 years old:**

For all visits and activities a minimum ratio of 1 adult to 6 group members is recommended.. This will need to be further adapted for children in the foundation stage or early years, informed by the factors listed below.

##### **Over 8 years old**

###### **Category A:**

A minimum ratio of 1 adult to 15 group members is recommended

There may be occasions, particularly in the use of school transport, journeys between school sites or in the neighbourhood of the school, where the above ratio may reasonably be increased as decided by individual heads, based on an assessment of risk.

###### **Category B:**

Minimum ratios are specified for particular activities in Section 4. Experienced instructors may exceed the ratios laid down in light of their assessment of the risks in a specific situation. However, standard practice is as described.

For other non-specified activities guidance on ratios may be determined through risk assessment and notification via Evolve but will generally not exceed 1 adult to 10 group members.

###### **Category C:**

One adult to 10 group members is the recommended minimum staffing ratio for visits abroad, but with a minimum of two adults accompanying the group.

### **3.11 Improved staffing ratios**

An improvement in the basic ratios and staffing outlined above should be informed by risk assessment and may be needed depending on:

- the gender, age, attitude, disability, behaviour and competence of the group members
- the extent to which people with special health needs or learning difficulties are included in the group
- the nature of any planned specialist activities
- the experience and expertise of the adults
- the duration and nature of the journey
- the need to maintain a complete programme of supervision
- the type of accommodation
- the competence of the staff -inexperienced staff should be counted as group members.

For all except very small groups, each party should be accompanied by at least one additional adult who is considered responsible by the visit leader and the head. This is essential for all visits abroad where the party comprises young people under the age of 18. For any visit where the party splits into sub groups the visit leader will need to consider whether two adults need to accompany each group.

Where the children of staff members are also on the trip, consideration must be given to any possible conflict of interest. Ideally, children of staff should be of the same age and ability as the rest of the group, and able to join the programme as a full member. Where this is not the case, supervision of these children should be undertaken separately to the rest of the group, and the staff to participant ratio adjusted accordingly. This should be noted in the risk assessment for the visit.

### **3.12 Early Years (0-5 years)**

There is an expectation in the Early Years Foundation Stage that all children have daily access to the outdoors. Teachers should therefore ensure that provision enables access to the outdoor environment, including use of the wider context in the local community. These activities and experiences will need to be planned in the same way as those offered in the classroom.

In accordance with the statutory framework, staffing arrangements for outings and visits off-site must be organised to ensure safety and meet the needs of the children. For each outing providers must carry out a risk assessment which includes an assessment of adult to child ratios. This assessment must take into account the nature of the outing. Information can be found in the Framework, Appendix 2. In general, the ratio for outings will be at least equivalent to the statutory ratio which applies to the school or early years setting and in most cases will require an improvement in those ratios.

For further information see:

**The Early Years Foundation Stage Statutory Framework and Guidance at:**  
<http://www.education.gov.uk/childrenandyoungpeople/earlylearningandchildcare/delivery/education/a0068102/early-years-foundation-stage-eyfs>

### 3.13 Special needs

For special needs groups a minimum ratio of 1 adult to 6 group members is recommended. There are many circumstances where support for young people with learning difficulties or physical needs will require this ratio to be improved. Where there are more than three group members with special needs the party should be accompanied by at least one additional adult who is over the age of 18 and considered responsible by the visit leader and the head.

The individual education plan (IEP) for each young person who has special needs will help to determine the degree of additional support they need for off-site activities. Young people with special needs, like all young people, should be encouraged to participate in as rich a variety of outdoor education as possible (*see Section 1.2*).

Outdoor education for people with special needs should take place with a closely defined purpose in mind. The visit leader must have a knowledge of the physical, mental, sensory and behavioural needs of group members and of the implications of these for the activity. Parents should be consulted and kept informed.

When young people with special needs are working with external providers, for example at an outdoor centre:

- allow sufficient time for discussion and outlining procedures - activities may need to be explained one step at a time, making clear what is expected of participants
- the respective roles of the group leader and the instructor may need to be discussed prior to an activity
- external staff will need to be informed of the special needs of group members.
- a procedure with the instructor should be established for withdrawing any participant if needed
- close attention should be given to medical and dietary needs and any emergency medical procedure – a system of communication may need to be agreed between staff and participants
- refer to the guidelines for particular activities and recommended staffing ratios.

### 3.14 Support staff

Support staff play a vital role in off-site visits and activities. Such staff may include:

- teaching assistants and Higher Level Teaching assistants (HLTAs)
  - parent volunteers
  - a member of the governing body of the school
  - students
  - volunteers
  - an external adult such as a youth affairs officer
- 
- Teaching staff have prime responsibility for supervision on a visit. The visit leader must always be a qualified teacher or youth worker. This also means that the visit leader is responsible for the curriculum context the group are working in. The visit leader will typically have knowledge, and can take proper account, of the needs of all group members taking part in the visit. However, a group leader may be a member of the non-teaching support staff.
  - Involvement of support staff can help to meet recommended staffing ratios, provided the responsibilities placed on support staff are appropriate

- The extent of support staff involvement will depend on:
  - a risk assessment of the activity
  - the size and nature of the group
  - the location of the group in relation to the visit leader
  - the relationship of the support staff to the group and their knowledge of the group members
  - the competence of the support staff in managing young people and expertise in specific activities including any relevant prior experience, training or qualifications they may hold.
- The visit leader does not have to physically accompany all young people on a visit at all times. At the visit leader's discretion the party may be divided into groups, with a group leader who has temporary charge of a group.
- In some cases, the visit leader may not accompany the group at all. This is 'remote supervision' and should follow the guidance in section 3.17.
- Group leaders and other supervisors must be competent to exercise good on-going risk assessment and risk management. This should include an understanding of when to stop an activity where the educational benefits are outweighed by the risks, when to adopt a plan B, should conditions need it, and how to deal with an emergency.
- The visit leader must properly brief all group leaders and other accompanying staff. This should include how to make contact with the visit leader in an emergency.
- Support staff should not take on the duty of care for young people, or take responsibility for the overall planning and organisation of the programme. However, they should be involved in planning and organisation. The level of this involvement will depend on the qualifications, role and experience of the individual.
- For local, low-risk visits and activities involving one or more small groups of young people a teacher can remain in school but must be contactable by a group leader needing support and be free to respond to a request for assistance.
- Support staff must be DBS checked if they have regular or unsupervised contact with young people.

#### **When support staff may act as a group leader**

- Teaching assistants taking small groups of pupils to the library or local park.
- Teaching assistants working one to one with pupils with special needs.
- A teaching assistant supporting the programme during a residential visit.
- Parents providing transport to a local after school activity using their own vehicle.
- A qualified coach leading a specific outdoor activity.
- A member of staff from another agency working with individuals or small groups in alternative curriculum settings.
- A teaching assistant accompanying a group of pupils to a nearby further education college or sports centre.
- Staff at an outdoor centre leading a weekly non-residential programme.

### **3.15 Using external providers, including qualified coaches**

External providers, volunteer and paid coaches, specialist field workers or instructors may support schools in a variety of off-site visits and activities.

All external providers including qualified coaches must be subject to robust checks, and have a clear contract. Section 4.4 of this Guidance sets this out in detail. The form SOE5 should be used.

The Duty of Care of the pupils remains with the school. It is not and cannot be delegated to the external provider or coach.

The *supervision* of the pupils can be delegated to the provider, so long as the checks set out in Section 4.4 are completed.

Where an external provider takes pupils off site without a member of school staff present, specific additional checks are required. This would include:

- Rationale for the arrangement, including the choice of external provider. It should be clear why this programme and the arrangements are in the best interests of the pupils.
- A clear contract setting out the responsibilities for supervision delegated to the external provider
- A named visit leader, employed by the school, who retains overall responsibility for the programme and the pupils on the visit.
- Agreement for pastoral care of the pupils
- Clear arrangements for action to be taken in the event of any incident, accident and emergency
- Clear and specific consent from parents
- Evidence of the monitoring of the programme, which must include visits to off-site provision

Typically a coach has a specific level of competence in managing and delivering an activity and this should be established before the coach leads or supervises the activity. For higher risk activities, including adventure activities such as climbing or watersports, it is essential that the coach holds a recognised award in that activity.

A coach may act as a group leader and work at some distance from the teacher. The teacher has overall responsibility for the group, but may delegate responsibility for the specialist, technical instruction during the activity.

The visit leader should seek to evaluate the competence of the coach and their ability to work with the age, behaviour and ability of specific groups of young people. Where possible, this should be through direct observation and regular, systematic monitoring and review. The level of direct supervision by the teacher, as visit leader, may then vary according to the competence and level of responsibility given.

### **3.16 Residential visits**

Mixed parties engaged in visits and activities involving an overnight stay should be accompanied by at least one adult of each sex. In this case the responsible adult may be a parent or student over the age of 18, where they are acceptable to the visit leader and DBS checked where appropriate. For primary aged pupils it may be acceptable for female teachers only to accompany mixed parties provided the head and staff involved are satisfied that it is an appropriate arrangement and parents are informed.

Greater flexibility for staffing smaller mixed groups may be exercised where all group members are over 16 years of age. In these circumstances the arrangement should be agreed by the head and parents should be informed.

### **3.17 Remote supervision**

Young people must be supervised throughout all visits, even though at times they may be unaccompanied by a member of school staff.

**Direct supervision** is where a member of school staff is with a young person / group.

**Indirect supervision** is where young people are unaccompanied by a member of school staff, but where there is a member of school staff in the vicinity for example as might occur in a museum, shopping centre, or “down-time” at an activity centre.

**Remote supervision** is where young people are unaccompanied by a member of staff, and the supervising member of staff is not necessarily in the immediate vicinity, for example, as might occur on DofE expeditions, Ten Tors training, and 6<sup>th</sup> form unaccompanied study visits, or where an external provider takes a group off site without a member of school staff present.

The decision to allow indirect or remote supervision should be based on professional judgement, taking into account factors such as:

- Prior knowledge of the individuals, including their maturity and levels of responsibility.
- Venue and conditions
- Activity
- Preparatory training
- Competence of staff
- Emergency systems in place

Specific arrangements are required where an external provider has delegated supervision of pupils and no school staff are present. See section 4.4 for details.

Outdoor education encourages young people to gain confidence in their own abilities and to work with others. Small group and independent work which is not under the direct supervision of a member of staff can be very beneficial for this. However, greater care is needed in managing activities which can be onerous and demanding and must be based on risk assessment. This will need to take account of factors such as prior knowledge of the individuals (including their maturity and levels of responsibility), the venue, the environmental conditions, the activity taking place, preparatory training, the competence of the supervising staff and emergency systems in place. The issue of personal security for young people is also important, of course, and consideration should be given to the need for appropriate supervision.

Where a programme takes place in the local area involving no unusual activity or risk it may be appropriate for a group of older students to operate in small sub-groups under the supervision of a single leader, for example in fieldwork in the local town. In this situation:

- agree arrangements with the head or EVC
- young people should work in groups in a prescribed area within easy reach of a point of contact with the group leader
- young people should not be asked to work alone - groups of three or four are more likely to be appropriate
- parents should be informed about arrangements.

For adventurous activities, in order to reach the stage of acting independently, young people must have acquired the necessary techniques with sufficient experience, confidence, physical ability and judgement to apply those skills effectively. The training given must be sound and thorough, with careful judgement being necessary before the leader can withdraw. Even then withdrawal from direct supervision should be a gradual and progressive process.

A staged progression may develop from:

- accompanying groups to
- shadowing groups to
- checking at various times and venues to
- occasional contact via pre-arranged locations and methods

The leader remains responsible for the group when its members are operating at a distance. Also see Ten Tors Section 4.5 and Duke of Edinburgh's Award Section 4.6.

## 3.2 Health and First Aid

First aid should form part of the risk assessment for off-site activities. This will help to determine first aid staffing and equipment.

One of the supervisory staff undertaking off-site activities should be a competent first aider. As a minimum, there must be an appointed person in charge of first aid arrangements. An appointed person is someone identified to:

- take charge when someone is injured or falls ill, including calling an ambulance, if required
- look after the first aid equipment.

Competence may be recognised by prior knowledge and experience, or preferably, as a result of formal training which may include an assessment. The level of staff competence required will depend on many factors including:

- the nature of the programme and whether it is residential
- whether the programme includes adventurous activities
- the number in the party
- the extent to which outside first aid assistance is available, such as at many residential centres
- the environment and particularly whether it is abroad or remote
- the health and medical needs of individual group members.

Leaders should attend a course run by an approved training provider for First Aid at Work or for Emergency First Aid at Work. Courses currently include:

- Emergency First Aid at Work (1 day)
- First Aid at Work (3 days)
- First Aid at Work (2 days refresher)

In addition, under the Child Care Act 2006, a First Aider trained in Paediatric First Aid must be present for all outings involving children under 5 years of age. This legal requirement, which has the status of a regulation, came into force in September 2008.

The Dartmoor Centres provide First Aid and Emergency Care courses under the authority of Mountain Medicine, an HSE recognised provider. These courses are specifically geared towards the outdoor environment. Full details of these awards from

[www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training)

A valid first aid certificate is a pre-requisite for many outdoor leadership qualifications for example Mountain Leader Training England (MTE), Royal Yachting Association (RYA),



British Canoe Union (BCU) or South West Mountain and Moorland Leader Training Scheme (SWMMLTS).

Individual establishments may wish to arrange a first aid course tailored to their particular needs and are urged to contact one of the first aid organisations.

For further information about training contact: Devon County Council Training Administration Team at [hrtahelp@devon.gov.uk](mailto:hrtahelp@devon.gov.uk) . Further information about the requirements for First Aid within Devon County Council in general can be found in the HS0019 First Aid Guidance Note.

Group leaders supervising water based activities should be competent in water rescue and life saving techniques, including cardio-pulmonary resuscitation (CPR). To supervise certain activities, including open water swimming, you will need the Bronze Medallion of the Royal Life Saving Society (RLSS).

### **3.21 First aid kit**

For all activities and the associated journey an appropriate first aid kit should be available and its stocks regularly replenished. The visit leader and other staff should be aware of its contents and know how they should be used. All staff should know how to contact the emergency services in this country or abroad, if applicable.

There is no standard list of items to keep in a first aid kit. It depends on what you assess the needs are. The minimum equipment in a first aid kit in the work place should normally include:

- guidance card giving general first aid advice
- individually wrapped sterile adhesive dressings in assorted sizes
- moist cleansing wipes
- two sterile eye pads
- two large unmedicated wound dressings
- six medium unmedicated wound dressings
- four sterile triangular bandages
- six safety pins
- one pair of disposable gloves

You should not keep tablets or medicines in the first aid box. A more comprehensive first aid kit may be required if leading groups abroad, for example, and in remote environments.

### **3.22 Miscellaneous medical hazards**

Information about miscellaneous medical hazards will be circulated as necessary by each LA. Some illnesses are nationally very uncommon but may result from activities which take place out of doors.

Weil's Disease typically results from contact with certain types of polluted water and may cause flu-like symptoms. Leaders should be aware of the disease and how it may be prevented including covering cuts and abrasions and wearing footwear to avoid cutting

feet. If in doubt consult a doctor. See [www.bcu.org.uk](http://www.bcu.org.uk)

Leaders should know if members of their group are at particular risk of anaphylactic shock, (due to bee or wasp stings or in response to a food allergen) and how the casualty may be treated. An ambulance should be called.

Lyme Disease results from infected ticks. Symptoms include a circular rash appearing after a few days or up to several weeks after the point of infection sometimes accompanied by flu-like symptoms of aches, pains, nausea and fatigue. Avoid walking in long grass or wooded areas unless exposed parts of the body are covered up. Where illness or unusual symptoms occur, take medical advice and be alert to a possible link. Find more information at: [www.babcock-education.co.uk/ldp/outdoorededucation](http://www.babcock-education.co.uk/ldp/outdoorededucation)

Protection from sun exposure should be considered for all off-site activities. This may include head, neck, arm and leg coverings, high factor (SPF 15 or higher) sun screen, sunglasses and shade. Loose fitting, tightly woven clothing is suitable, as are wide brimmed hats which may need to cover the ears and back of the neck. Drinking plenty of water is important to avoid dehydration. Some people are more prone to the dangers of exposure to sunlight. Activities may need to be modified according to conditions, informed by a risk assessment.

- Find more information about sun protection at: [www.hse.gov.uk/skin/sunprotect.htm](http://www.hse.gov.uk/skin/sunprotect.htm)
- Find NHS advice at: [www.nhsdirect.nhs.uk](http://www.nhsdirect.nhs.uk)
- Find generic advice on health, safety and wellbeing at:

**Devon:** [www.devon.gov.uk/healthsafetyandwellbeing](http://www.devon.gov.uk/healthsafetyandwellbeing)

This site also provides access to the DCC OSHENS accident reporting arrangements.

**Torbay:**

[www.torbay.gov.uk/index/education/schools/schoolshealthandsafety.htm](http://www.torbay.gov.uk/index/education/schools/schoolshealthandsafety.htm)

**Dept for Education:**

<http://www.education.gov.uk/schools/adminandfinance/healthandsafety>

### 3.3 Safeguarding children

All Devon and Torbay council employees and other adults whose work involves regular or unsupervised access to young people under the age of 18 are screened in conjunction with the Disclosure and Barring Service (DBS). This is based on the enhanced disclosure.

It is also a requirement that volunteers, including those working on specific projects or providing services for the school, should be checked if they have regular or unsupervised contact with young people.

Heads of establishments who give approval for off-site activities will need to consider whether any accompanying adults, including volunteers and parents, have unsupervised access to children and whether they need to apply for a DBS check in line with statutory requirements. See [www.devonsafeguarding.org](http://www.devonsafeguarding.org)

External providers are not required by law to undertake DBS checks on their staff, as they are not a “specified establishment”. Schools using external providers should ensure that where their chosen provider does NOT DBS check staff, school staff accompany the pupils at all times.

A limited series of pre-checks can be done in one or two days, although, the DBS check takes significantly longer.

Devon and Torbay Councils require that every driver and recommends every adult engaged in providing transport on behalf of the council has an enhanced DBS check. This recommendation includes parents or volunteers even if they are not left alone on the vehicle with young people.

Get more information from:

**Devon:** The Records Disclosure Service, Room 228, Topsham Road, County Hall, EX2 4QU. **Phone: 01392 383266. Email: [disclose@devon.gov.uk](mailto:disclose@devon.gov.uk)**

[www.devonsafeguarding.org](http://www.devonsafeguarding.org) and also  
[http://www.devonsafeguarding.org/children/prac\\_disclosure\\_and\\_barring.html](http://www.devonsafeguarding.org/children/prac_disclosure_and_barring.html)

**Torbay:** Child Protection Unit  
**Email: [Csenquiries@torbay.gov.uk](mailto:Csenquiries@torbay.gov.uk) Tel 01803 208208**  
**<http://www.torbay.gov.uk/a-z?id=101>**

**DBS:** website at <https://www.gov.uk/government/organisations/disclosure-and-barring-service>

**Dept. for Education:**

<http://www.education.gov.uk/schools/leadership/statutoryguidance/g00213977/supervision-guidance>

### **3.4 Insurance**

Leaders must satisfy themselves that adequate insurance exists for people and property well before an educational visit or off-site activity takes place. The following outline of each council’s insurances, and other insurances which may be assumed to exist, may help leaders to decide what cover, if any, is desirable.

**NB. Academies, their staff and pupils, are not insured by Devon or Torbay Council. Therefore head teachers and other school staff concerned with the approval of visits and off-site activities will need to check whether adequate insurance is in place for the proposed visit.**

**Academy schools who buy back into Torbay Council Insurance services can contact the Authority on 01803 207174 for assistance.**

In addition the visit leader should consider what insurance is provided by other organisations they are involved with, such as a travel firm, landowner or residential centre. Evidence of adequate Public Liability Insurance (for a sum insured of not less than £5m) should be requested from any third party provider such as a residential or activity centre/provider.

Parents should be aware of the scope of insurance cover provided, particularly for residential programmes.

### **3.41 School journeys**

Insurance cover is automatically provided to schools and colleges for all approved school journeys, both in this country and abroad, without the need for prior notification.

The school journey policy provides an indemnity against specified risks associated with cancellation, limited personal accident cover, medical expenses, loss of personal effects and legal liability. Each and every member of a school journey party who is either a person involved in full-time or part-time education or a teacher or other adult not over (Devon CC) 65 years of age or (Torbay Council) 80 years of age is insured. The policy covers any trip or excursion not exceeding (Devon CC) 31 days or (Torbay Council unlimited) in duration (including exchange visits and work experience placements) approved by the council which involves travel outside the school boundaries.

The policy also includes limited winter sports cover (skiing, ski walks, the use of ski-bobs and toboggans, skating and snow boards but there is an expectation that these activities will all be undertaken to a standard appropriate to the person insured's experience and training as judged by qualified instructors.

For mountaineering, rock climbing, caving, diving and other hazardous activities there is a requirement by Devon CC and Torbay Council that the group leader or instructor in charge of the activity has reached an approved standard of competence in the activity.

There are limited exclusions applying to the individual Insurance policies arranged by Devon and Torbay Councils, the main ones being:

**Devon** - sailing outside inland and coastal waters, major expeditions, motorcycling and racing other than on foot, air travel other than as a passenger in a licensed passenger carrying aircraft and any person travelling against medical advice.

Trips or excursions where insurance is provided as a part of the package price are excluded.

**Torbay Council** – Any person travelling against medical advice and air travel other than as a passenger.

Please note that both Devon and Torbay school journey insurance arrangements do not cover normal on-site activities or activities carried out by non-education establishments with the exception being activities carried out by Torbay Council's Youth Services.

Furthermore Devon CC's school Journey Insurance will not apply to regular offsite sporting activities.

For more information about the cover currently provided, please refer to the links below.

You can get a claims form from and submit claims to:

**Devon:** The Insurance Section, Chief Executive's Directorate,  
Room G32, County Hall, Exeter EX2 4QD. Phone: 01392 382292

**Torbay:** The Insurance Manager, Commercial Services, Torbay Council, Castle Circus,  
Torquay, TQ1 3DR. Phone: 01803 207174

Completed claim forms must be submitted by the school to the Council, with receipts, and not by individual students or their parents. Claims should be notified as soon as possible, with full details provided within 30 days of the claim or 7 days in respect of riot or malicious damage. The police must be notified as soon as possible in the event of theft or malicious damage.

In the event of accident or sickness requiring urgent medical attention under this policy contact:-

**Devon CC:-**

Zurich Travel Assistance - Tel: (+44) (0) 1489 868 888.

Policy No - SJ-05AA02-0026 issued by Zurich Municipal

**Torbay Council:-**

Chubb Assistance - Tel: (+44) (0) 207 895 3364

Policy No - 64813297 issued by Chubb Insurance Company.

**These arrangements do not automatically apply to establishments which do not buy into to the corporate school journey insurance. Establishments or individuals falling outside this scheme may therefore choose to arrange their own travel insurance for school pupils and other members of the party.**

We recommend you get a European Health Insurance Card (EHIC) to receive necessary healthcare during a visit to a European Economic Area (EEA) country or Switzerland. The EHIC entitles you to reduced-cost, sometimes free, medical treatment that may be necessary during your stay.

Find more details and apply on-line at: [www.ehic.org.uk](http://www.ehic.org.uk)

### **3.42 Personal accident and liability**

Pupils attending Devon or Torbay schools and colleges are not insured for personal accident benefits while on education premises.

The LA is insured against its legal liability for any injury, loss or damage caused to pupils or students as a result of negligence on its part or that of its employees, servants or agents, including volunteer helpers, subject to these conditions:

a) Employees, volunteers and activity providers taking charge of hazardous activities such as: mountaineering, rock climbing, caving, winter sports, snorkelling and sub-aqua diving, canoeing, surfing and sailing must meet the minimum standards of competence and experience as defined in this booklet. If there is uncertainty about these standards contact the Health, Safety and Well-Being service in the first instance or submit plans via Evolve.

b) Council policies do not cover damage or injury arising from motor accidents in privately owned vehicles as every car user is required by law to insure their vehicle against third party risks, including liability to their passengers. All claims in these circumstances must be dealt with through the vehicle owner's insurance. People using their own vehicle should check that they have appropriate cover with their own insurers. In the case of collisions between vehicles, the claim will be against the insurance on the vehicle whose driver was to blame. Where school transport is used it is insured by the council providing the school has bought back into the corporate insurance.

If you are using a hired coach it would be sensible to check the insurance with the hire company.

c) Each Council has a limited, special personal accident insurance for teachers in addition to the cover from the school journey insurance. Benefits may in some circumstances become payable to the teacher whether or not there is a legal liability on the part of the council or its employees and their helpers. This is only if the injury is sustained when the teacher is engaged in an extra-curricular activity outside that which they are required to do under their contract of employment.

Benefits also exist under Superannuation Regulations and Conditions of Service.

**Devon:** Injuries sustained by Devon County Council employees should be reported on the OSHENS accident reporting website. For information see:

<http://staff.devon.gov.uk/cr/er/healthsafetywellbeing/healthsafety/accidentreporting.htm>

**Torbay:** For information see:

[www.torbay.gov.uk/index/education/schools/schoolshealthandsafety.htm](http://www.torbay.gov.uk/index/education/schools/schoolshealthandsafety.htm)

### **3.43 Additional insurance**

Individuals who feel that the cover from the council's insurers may be inadequate to meet the needs of their family are advised to get a Personal Accident Policy at their own expense. Non-employees are particularly recommended to consider this.

The council expects all employees, pupils and students to accept full responsibility for their personal possessions, including money, and to consider taking out insurance themselves to cover any risk.

### **3.44 Insurance: transport and travel**

Any vehicle insured by (owned by or leased) the council should only be used on official council business. This includes out of school activities if they are in the overall curriculum or form part of the day-to-day routine. The driver should check that their age and licence falls within the insurance companies constraints and meets legal requirements.

For Torbay Council – the driver will be required to undertake a driver assessment and licence checks, all of which will be carried out by Tor2 who provide fleet management services to the Council.

The vehicle and driver must be correctly licensed, including PCV or Section 19 where required, at all times or cover may be invalidated.

Young people are often taken on school activities or business in cars driven by teachers. Staff should check that their insurance covers the use of their vehicle on council business. Most insurance companies will provide this cover. The policy must also provide indemnity to the council. Staff should check that any payment or receipt of a mileage allowance will not make their policy void, since some companies might regard this as use for 'hire or reward'.

For limitations per incident under the school journey policy, in respect of any loss from an unattended locked vehicle provided it is in a locked garage – please refer direct to Council's Insurance department.

Find more information at:

**Devon:** [www.devon.gov.uk/eal/docs/may04/0419040.doc](http://www.devon.gov.uk/eal/docs/may04/0419040.doc)

or: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) Click on *Supplementary Guidance*.

**Torbay:** Insurance Manager, Phone: 01803 207174

or visit: [www.torbay.gov.uk/schools-finance-and-procurement](http://www.torbay.gov.uk/schools-finance-and-procurement) (under revision as at 20/1/2012).

## 3.5 Transport and travel

### 3.51 Managing groups when travelling

Initial planning, good discipline and appropriate supervision arrangements are essential. The level of supervision required in a vehicle should be considered as part of the overall risk assessment. To ensure adequate supervision a second adult may be needed, unless the journey is local, the group size is small or the young people are responsible.

The transport needs of young people with special educational needs or a medical condition should be assessed. This will help determine what type of supervision, what equipment and what type of vehicle is needed to transport the young person.

If a vehicle needs to stop in an emergency the occupants of the vehicle should remain together under the direct supervision of a responsible adult until assistance arrives. The group leader should normally evacuate the vehicle and move the group to a position behind the safety barrier on a motorway or well away from moving traffic.

#### **On Foot**

Pupils should walk in controlled groups. One member of staff should be at the front or in control of the front of the group, another at the back or aware of any individuals who are behind. The degree of control needed will depend on the nature of the group and location. The visit leader and other staff need to assess risks before the event and on a continuing basis and consider how risks will be managed.

Where possible, avoid walking on roads and use pavements. Where there is no pavement, walk on the right-hand side of the road, facing oncoming traffic. Large groups may need to keep on the left, with a look out at the front and rear of the group. When approaching dangerous corners on roads without a pavement, the whole party should stop. The leader should move forward until they can see that it is safe, and then the group can move

forward. If it becomes unsafe, the leader or assistant lead should use a verbal or visual signal to warn the whole party.

When walking on roads in darkness or semi-darkness, the leaders should wear light clothing or fluorescent markers, and should have a light for front and rear.

Particular care should be taken when groups need to cross a road: use recognised crossings where possible and escort the group from a safe zone to a safe zone. The leader should have sole control of any crossing, being advised by other staff members where necessary. Encourage young people to be considerate of other pedestrians.

### **By minibus or car**

Visit leaders and heads should be aware of the high level of accidents related to using minibuses and cars, and the driver's liability to prosecution in the event of breaking the law. A major responsibility also lies with the organiser of the journey. When journeys are planned, heads and visit leaders must be satisfied that drivers are aware of the constraints which affect any journey by road.

Some of the major ones are:

- passenger safety
- whether the driver is competent and trained to drive the proposed vehicle and holds the appropriate valid licence
- the experience and capacity of the driver to maintain concentration
- the type of journey; long distance or local
- traffic conditions
- weather conditions
- the journey time and distance, including the length of the driver's day
- emergency arrangements
- insurance cover
- supervision
- stopping points on longer journeys for toilets and refreshments
- suitability of the vehicle for the journey.

Where young people are carried in teachers' or parents' cars every effort should be made to ensure that precautions have been taken to minimise the risk of injury. This may need to include using child-proof locks on rear doors.

Before the journey basic safety items should be checked including; tyres, lights, and windscreen wipers. Vehicle log books and the Transport Safety Guidance Note HS0056 contain the full list of items a driver is expected to check before starting the journey. A similar check should be carried out by volunteers or parents on any car they may provide. These checks should complement regular school-based procedures and garage servicing. It is the driver who is responsible for a vehicle, its suitability and its condition during any off-site journey.

Staff and volunteers should not drive when taking medication, drugs or alcohol or undergoing treatment that might affect their ability or judgement.

On long journeys the visit leader should, as a minimum, operate within the Passenger Carrying Vehicles drivers' hours regulations. The maximum period of continuous driving should be 5.5 hours, after which a break of 30 minutes should be taken, or up to three



breaks totalling at least 45 minutes. On long journeys there should be more than one driver to avoid fatigue.

### **By coach**

On boarding any large vehicle, the same general procedure applies: one adult should board the vehicle and receive the students; another adult ensures orderly access from outside. Reverse the procedure for disembarking.

The visit leader should provide for travel sickness and consult with the driver to plan for toilet and refreshment stops.

Staff seating arrangements should reflect the need for adequate supervision and ability to respond in an emergency. On double-deckers, a supervising adult should be present on each deck. Discipline remains the responsibility of the visit leader and other supervising adults, never that of the driver.

The Devon County Council maintains an Approved Bus and Coach Operators List to enable schools to identify operators who are able to provide vehicles and drivers to a minimum standard at all times. This includes seatbelts on all seats and drivers who are DBS checked to the enhanced standard.

Find more information at:

**Devon:** Email: [envtcsqf@devon.gov.uk](mailto:envtcsqf@devon.gov.uk) or phone: 01392 382886

<http://staff.devon.gov.uk/approvedoperatorslist.htm>

### **By air**

Before travelling ensure you are familiar with advice and requirements from your travel provider and plan accordingly. In particular consider the needs of group members with special needs or significant medical conditions. In the airport identify an appropriate base and meeting place for the group. Keep luggage in sight at all times; do not leave it unattended. Remind group members to co-operate with safety and security procedures and not to carry goods on behalf of others.

### **By rail**

Where possible, reserve seats in advance so that the group can be kept together and supervised during the journey. Ask station officials about the stopping position of reserved coaches, so that students can be gathered in a place near the carriage.

Make it clear to students that unnecessary movement in corridors and gangways will not be allowed, and explain toilet or buffet car procedures. Prior discussion of possible dangers, and alert supervision by adult staff, should eliminate inappropriate behaviour that may lead to injury, accident or inconvenience.

### **By sea**

Difficulties have been experienced by ferry companies with school groups. Visit leaders are responsible at all times for their group on board ship and staff should supervise the group throughout the crossing. Procedures adopted by individual ferry companies should be followed. Visit leaders should explain the dangers of unruly behaviour and the inconvenience this would cause to other passengers. In the case of shorter Channel crossings this will normally mean staying with their group. For all crossings identify a known meeting point for all group members and consider in what circumstances group

members may be allowed on deck. Groups on a boat cruise in the UK should ensure the vessel is registered and inspected by the Maritime and Coastguard Agency.

### **By underground**

Plan in advance for travelling by underground; organise students into smaller groups, each attached to a particular adult nominated in advance. Set up a clear procedure to be followed by any student who gets left behind or separated because of crowded compartments or because they miss stops.

Buy tickets in advance to avoid delay and congestion around ticket machines and barriers. Students should use escalators in single file, with an adult at the front and back of the group to supervise students getting on and off the escalator. Students should be assembled well back from the edge of the platform until the train doors have opened. Try to avoid rush-hour travel on the underground from 7.30am to 9.30 am and 4.30pm to 6.30 pm.

### **3.52 Using parents' and volunteers' cars**

Where parents and volunteers' cars are used on school activities the head should notify parents and volunteers of their responsibility for the safety of pupils, to maintain adequate insurance cover and to ensure their vehicle is roadworthy and has a current MOT certificate.

The head or visit leader will need to consider the suitability of parents or volunteers to carry young people in their car and whether vetting is necessary. The current law means that if parents or volunteers transport children on a *regular* basis, then they **must** have an enhanced DBS check. However, both Devon and Torbay Councils recommend that ALL drivers and every adult engaged in providing transport on behalf of the Council has an enhanced DBS check. We advise that parents or volunteers are not put in a position where they are alone with a young person other than their own child.

A draft letter for schools and other establishments to send to parents and volunteers who use their cars to transport young people on activities is available. There is also a form for parents and volunteers to return to the school, indicating they have read and understood the requirements.

Visit: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) and click on *Supplementary Guidance*.

### **Seat belts and child restraints - including booster seats and booster cushions**

- Children under the age of 12 and under 1.35m in height must use the correct child restraint when travelling in a car. Exceptions include the rear seats of a taxi and for unplanned and unforeseen journeys.
- Every young person travelling in a car should wear a seat belt or appropriate child restraint. The correct child restraint should always be established by weight and should fit correctly. Vehicles without seat belts or appropriate restraints should not be used. The central lap belt in the back seat of a car should not be used to carry children who require a child restraint.
- Side facing seats should not be used as they only have lap belts and injuries are more likely to occur in an accident.
- Children who require a child restraint should not use the front seat of a car.

- Minibuses and coaches used to carry three or more young people aged 16 or under must be fitted with seat belts and a forward facing seat for each young person.
- Young people riding in the front passenger seats of minibuses must use a seat belt which is not a lap belt. It is the council's policy that no child under the age of 11 should use the front passenger seats of a minibus.
- Passengers in minibuses must be told of their responsibility to wear a seatbelt.

Find more information at: [www.devon.gov.uk/healthsafetyandwellbeing](http://www.devon.gov.uk/healthsafetyandwellbeing)

### 3.53 Licensing and additional requirements for vehicles

Passenger Carrying Vehicle (PCV) Licensing Requirements are a legal requirement for any minibus used for 'Hire and Reward'. This covers any payment for the trip.

The only exemptions are if:

- the organisation is non-profit making, and a Section 19 Permit (Small Bus Permit) has been issued to it
- a Section 22 (Community Bus Permit) has been issued to run a voluntary non-profit making bus service using unpaid volunteer drivers.

A Section 19 (Small Bus Permit) must be held before undertaking any trip where a payment is made. Torbay Schools can obtain permits from the Traffic Commissioner. Permits for DCC vehicles may be obtained from the Transport Co-ordination Centre. Any other applications will need to be dealt with by the Traffic Commissioner.

#### Driving licence categories

Category	Vehicle covered	Explanation
<b>D</b>	Passenger carrying vehicle (PCV) of any size	Vehicles able to carry more than 9 passengers (no upper limit)
<b>D1</b>	Passenger carrying vehicle (PCV) Minibuses	Vehicles able to carry 9 - 16 passengers including 'for hire and reward'
<b>D1 Restricted</b>	Minibuses restricted to non PCV use	Vehicles able to carry 9 - 16 passengers but only if it is not 'for hire and reward'
<b>B</b>	Cars	Including people carriers up to 8 passengers

If a Category B driving test was taken before 1 January 1997, Category D1 Restricted is also granted. If the driving test has been taken since 1 January 1997, Category D1 Restricted is not granted.

#### Devon

Any Devon County Council member of staff or volunteer driving any minibus on a school journey or similar programme must be a council approved minibus driver, through having satisfactorily completed the minibus test or obtaining a PCV driving licence prior to driving passengers in a minibus. Refresher training must also be done every four years.

## **Devon County Council**

Council vehicles can be used if all these conditions are met:

- the driver is approved through the Transport Co-ordination Service (TCS) either by:
  - passing the approved minibus driver test organised through Devon Drivers' Centre at Westpoint 01392 444773
  - or
  - holding a PCV licence and registering with TCS by sending a photocopy of the licence - PCV licence holders are not approved until registered with TCS
- the activity must be funded, approved or organised by an LA establishment
- the group, if outside DCC, is TCS approved - Community Hire Scheme.

## **Torbay Council**

Drivers of a Torbay Council owned minibus must have a D1 licence, have undertaken a Devon County Council minibus test and the in house course through Torbay Council, and a copy of the driving licence must be sent to the Tor2 Garage and be registered with them for insurance purposes. Requirements for school owned vehicles will be determined by individual schools in accordance with their insurance company requirements.

## **Vehicle loading on minibuses and other vehicles**

The driver is responsible for any load carried. There must be uninterrupted access to all doors; luggage and equipment must not block gangways or doors or access to them. Doors must be left unlocked when the vehicle is carrying passengers.

The balance of the vehicle must also be considered, particularly when roof racks or trailers are used. The manufacturer's maximum permitted weight must not be exceeded. This is commonly 100kg on a Ford Transit minibus and 90 kg on an LDV.

## **Towing**

Passengers should not be carried when towing a trailer if the emergency doors (the second doors in addition to the normal access door) are rear-facing, as in the event of an accident the trailer is likely to block the emergency doors. Any minibus carrying passengers while towing should have a separate emergency door fitted at the rear offside, if necessary in addition to rear facing doors.

Note that drivers must comply with driver licensing requirements for towing trailers. See INF 30 Towing Trailers in Great Britain available from the DVLA at: [www.dvla.gov.uk](http://www.dvla.gov.uk)

## **Taking a minibus abroad**

Minibuses suitable for carrying 10 or more people, including the driver, must be equipped with a calibrated tachograph for all journeys through EU countries, including Eire. Drivers travelling abroad need to be aware of EU regulations and regulations of other countries for drivers' hours, licences and other requirements.

When the vehicle is abroad it must have:

- copy of fully comprehensive insurance certificate
- a Waybill
- a Model Control Document
- an Own Account Certificate
- five star breakdown cover

- driving licences
- MOT certificate
- V5 Vehicle Registration Document
- Tachograph Calibration Certificate.

For Devon you can get most of these from the Transport Co-ordination Service phone: 01392 382783. Please make sure you give adequate notice. The Own Account Certificate will need to be completed before sending it for validation.

Section 19 (Small Bus Permits) are not valid abroad, and the driver must hold a PCV licence, Category D or D1 (unrestricted). Category D1 Restricted is not valid abroad.

Minibuses abroad must have these on board at all times:

- fire extinguisher
- first aid kit
- warning triangle
- spare set of bulbs
- high visibility jacket for the driver.

### **Training and additional information**

Get additional training in driving minibuses from Devon Drivers' Centre.

Visit: [www.devon.gov.uk/devondriverscentre](http://www.devon.gov.uk/devondriverscentre)

Phone: 01392 444773 or Email: [drivers@devon.gov.uk](mailto:drivers@devon.gov.uk)

For more information and guidance contact:

The Transport Co-ordination Service, Matford Offices, County Hall, Exeter, EX2 4QD.

[www.devon.gov.uk/school\\_care\\_transport](http://www.devon.gov.uk/school_care_transport)

Phone: 01392 382886

*Transport for Schools: A Guide for Headteachers and School Staff* is available at:

[www.devon.gov.uk/healthsafetyandwellbeing](http://www.devon.gov.uk/healthsafetyandwellbeing)

Torbay Children's Services Transport Team

[www.torbay.gov.uk/schooltravelsupport](http://www.torbay.gov.uk/schooltravelsupport)

Email: [transport.co-ordination@torbay.gov.uk](mailto:transport.co-ordination@torbay.gov.uk) or phone: 01803 207685

## **3.6 Finance**

The head should ensure that parents are given reasonable notice of the costs of educational and off-site activities. The head should establish secure procedures for managing associated income and expenditure including clear banking and accounting procedures.

### **3.61 Charges for school activities**

*The Education Act 1996* determined aspects of education for which charges may be made.

These key principles may be considered to apply for off-site activities:

- Education provided wholly or mainly during school hours should be provided without charge.

- Off-site activities can be financed through voluntary contributions, although this should not lead to parents who do not contribute being treated any differently. If insufficient parents contribute this may lead to such activities being cancelled.
- Charges can be made for the board and lodging element of any residential programme. For a residential activity taking place mainly during school time, or which meets the requirements of the syllabus for a public examination, or is to do with the National Curriculum or religious education, no charge may be made either for the education or for the cost of travel. This does not stop a voluntary contribution being sought.
- A charge, not exceeding the actual cost, may be made for board and lodging, except for young people whose parents are receiving Income Support, Income-based Jobseeker's Allowance, Child Tax Credit (where the parent is not entitled to Working Tax Credit and whose annual income does not exceed £15,575 –Financial Year 2008/9), support under part VI of the Immigration and Asylum Act 1999, an income related employment or support allowance or the guarantee element of State Pension Credit. The eligibility criteria are aligned with free school lunch eligibility.
- Programmes which take place wholly or mainly outside school hours, and are not part of statutory curriculum provision may be considered as optional extras for which charges can be made. The charge for a pupil should not exceed the actual cost of providing the activity divided equally by the number of pupils participating (it will not include a share of the cost of any remissions).
- Educational visits and off-site activities may also be paid for by special fund raising events, donations or sponsorship, subsidy from school or other funds or charitable grants.
- Each school should have a policy on charging for school activities. The council has issued guidance on these arrangements.

For more information see the Department for Education website:

<http://www.education.gov.uk/schools/adminandfinance/financialmanagement/goodpractice/b0011770/charging-school-activities/>

**Torbay:** Guidance on Charges and Remissions

[www.torbay.gov.uk/charges-and-remissions-policy](http://www.torbay.gov.uk/charges-and-remissions-policy)

### 3.62 VAT

HM Revenue & Customs (HMRC) accept that virtually all school trips are of an educational nature and VAT incurred on expenses can be recovered (see below for the exception) provided all the rules are correctly applied. These are complex and should be checked as part of your planning process.

Note where trips/tours are provided under the 'tour operator's margin scheme' (TOMS) the provider will not be permitted to provide a full VAT invoice so VAT will not be recoverable on such trips/tours. You should work out your costs gross of any irrecoverable VAT. Also, any non-UK VAT incurred on trips outside the UK is irrecoverable.

Get more advice from:

**Devon:** Contact the Tax Team on 01392 382410. Also see ED/4 of the VAT manual.

**Torbay:** Phone: 01803 207286 or visit: [www.torbay.gov.uk/schools-finance-and-procurement](http://www.torbay.gov.uk/schools-finance-and-procurement)

### 3.7 Retaining records

Records of consent forms, approval, risk assessment and associated programmes should be retained for all school trips and visits for one month after the trip and then may be shredded. (Retain for 12 months in the case of Torbay Council). Academies may have their own requirements.

The exception to this involves incidents where the school is aware that a significant injury has occurred to a pupil or a claim has been received. In these cases the information should be kept for 25 years from the date of birth of the child.

Reportable accidents within Devon County Council establishments should be logged on the OSHENS system: <http://www.devon.gov.uk/healthandsafetyservice.htm>

Trips and visits on Evolve are archived automatically and the records kept. Therefore, where an incident has taken place, we recommend attaching the additional information, including parental consent forms, to the Evolve visit form.

The establishment will need to retain all the visit information where the visit is **not** notified on Evolve. This will apply where an establishment chooses not to use Evolve for Category A visits.

### 3.8 Consent Forms, and Checklist of information to parents, guardians and carers

The list below gives the information which should be given in writing to parents /carers before getting their written consent.

For clarification, parental consent can be considered in three layers:

1. Local visits on foot, in school time, to non-hazardous venues (Category A), such as the local church or sports field, do not normally need written parental consent. It is recommended that head teachers inform parents of this principle at the beginning of their children's school career or in the handbook for parents. (An exception is with regard to nursery age children for whom parental consent is required.)
2. Other low risk (Category A) educational visits, involving transport, may be covered by one parental consent form. This may cover, for example, a school term or a school year as a whole. (See Form SOE3a)
3. Consent is required for every higher risk visit involving adventurous activities (Category B) and visits abroad (Category C). In addition, specific parental consent should be obtained for low risk (Category A) visits where a residential stay is included. A specific programme of events occurring over a period of time, such as a term, may only require one consent form. (See Form SOE3)

For all visits parents should be kept informed of arrangements and of any extra safety measures required.

1. Dates.
2. Objectives of visit or activity.
3. Times of departure and return, including location for meeting parents.
4. Method of travel including name of any travel company.
5. Accommodation with address and telephone number, including details of host families for exchange visits.
6. Emergency contact arrangements, at home and away, if all young people are not at one centre. Consider using a 'telephone tree' to make easy and rapid contact with a large group of parents, for things like changes to transport arrangements.
7. Name of visit leader and accompanying staff. Clear information where the visit leader is not attending the visit, for example where an external provider or coach is engaged.
8. Names and status (such as parent or member of the governing body) of other accompanying adults who will have some responsibility during the visit.
9. Details of activities planned. Any activity involving special hazards must be clearly specified.
10. Charges or voluntary contributions and what they cover.
11. Methods of payment and cancellation arrangements.
12. Insurance used for baggage, personal accident, cancellation and medical cover for the group members. Send a photocopy of the insurance schedule to all parents or state that a copy of the schedule can be obtained from the visit leader if needed.
13. Clothing, footwear and other items to be taken. Prohibited items may need to be highlighted.
14. Money to be taken.
15. Code of conduct and details about the standard of behaviour expected from the group during the visit, including, where appropriate, rules on general group discipline, smoking, sexual behaviour, illegal substances and alcoholic drinks.
16. Parents should complete a medical form for all residential visits and give their written consent for emergency medical treatment.

Parents should be invited to a planning meeting, especially where a residential experience is involved or for visits abroad. This provides the opportunity for everyone to be fully informed and to raise issues which may be difficult to address in writing. For young people over the age of 18 a parental consent form is not needed.

If a young person is in the care of the council their care plan should say who can consent to off-site activities. For Category A activities an agreement will normally be reached for consent for a range of activities during the time the child is receiving care. A consent form agreed with the client and, where appropriate, someone acting on their behalf, should be completed for all activities in Category B or C.

### **3.9 Emergency procedures**

Emergency procedures are an essential part of planning a visit or off-site activity. If an accident occurs the priorities are to:

- assess the situation
- safeguard the rest of the party
- attend to the casualties
- inform the emergency services by calling 999 or 112.



An emergency is difficult to define. It may be a fracture, food poisoning or a fatality, or an illness requiring immediate medical treatment. It may on the other hand be missing children who are soon found or a coach crash in which no serious injuries are sustained. The following notes are for guidance. These notes are for guidance and the procedures listed will not all apply to all emergencies.

1. Assess the nature and extent of the emergency.
2. Make sure all other group members are safe from danger and are looked after.
3. Give first aid and attend to any casualties.
4. Call the emergency services as needed. As a minimum you are likely to be asked:
  - your precise location
  - a description of the incident
  - the time of the incident
  - the number of casualties
  - the nature of any injuries
  - the total number in the party
  - your telephone numberIf the police are involved they will take any statements.  
An adult from the party should accompany any casualties to hospital.
5. Supervise and support the rest of the group and arrange for their return to base.
6. Inform young people whether they may use any mobile phones and in what circumstances.
7. Arrange for one adult to remain at the incident site to help or liaise with the emergency services.
8. Contact the off-site base to communicate with other staff in the party (outdoor centre, hotel, youth hostel etc.)
9. If the party is abroad, consider contacting the local British consulate or embassy to seek their support.
10. Contact the head, emergency contact point or designated senior member of staff with the information listed under point 4 above and:
  - names and telephone numbers, if necessary, of individuals involved
  - names of other members in the party
  - action taken so far
  - action to be taken and who will do it
  - telephone numbers for future communication.
11. For a serious incident, where the media may be involved, identify alternative phone numbers at home and off-site base as other lines may quickly become jammed.
12. The head or designated senior member of staff may need to contact the Director for Children's Services or the nominated officer in the Council's Emergency Plan, give details of the incident and:
  - Identify action required, which may include financial assistance.
  - Identify alternative and additional telephone lines
  - In cases of a major incident out of hours involving the emergency services, the police will make direct contact with the Emergency Planning Service Duty Officer who will then take appropriate action.
13. The head will arrange to contact parents and carers of those involved as soon as possible. For a serious incident the head should contact parents of all party members. It is also the responsibility of the head, or designated support staff, to act as a link between the group involved, the chair of governors, the council and parents.

14. The Council will normally liaise with the media\*. A designated person should act as the ongoing point of contact with the media and all involved should direct questions and requests to them. This person will need to liaise with the emergency services, perhaps on site. (\*This assumes that, should a school be involved, they have subscribed to the Press and PR Service.) The school website can provide a useful means by which general information is made available and updated.
15. Write down all relevant details while still fresh in the memory. Other group leaders may be asked to do the same. A record should be kept of names and addresses of any witnesses. Keep any equipment involved in its original condition. If possible do not disrupt the scene of the incident until a full investigation has been completed.
16. Restrict access to a telephone until you have informed the head and there has been enough time for the head to contact those directly involved.
17. Legal liability should not be discussed or admitted.
18. Refer requests from the media to the designated individual as identified above.
19. Contact insurers, particularly if medical assistance is needed.
20. Complete and forward all accident forms and reports.
21. For serious incidents consider further professional counselling support for those directly or indirectly involved.

A mobile phone is an essential item of equipment for a visit leader and may save valuable time in the event of an emergency. Staff members should know the mobile phone numbers of other key staff in the party. However, difficulties frequently arise with mobile phones due to reception, battery power or insufficient credit. Mobile phones should complement and not replace traditional safety and communication procedures. Keep details of these emergency procedures to hand and ensure that you can implement them. Where the emergency requires additional support or is of a serious nature contact:

**Devon:**

Corporate Contact Centre phone: 0845 155 1015 during office hours.

DCC Children's Services Business Support Team Co-ordinator phone: 01392 383369 during office hours.

Devon Health and Safety Service 24 hour emergency pager system: 07659 146024

Emergency Planning Team phone: 07699 734637 out of hours pager number but available 24 hours if the above number is unobtainable. You may then be transferred to a senior officer in DCC.

**Torbay:**

Phone: 01803 550405 (24 hours)

Academies should check who they can contact for support in the event of a major incident.

# Section 4

## Leadership for specific environments and activities

The way the visit leader and other members of staff manage an off-site visit or activity is generally the most important factor in determining the programme's success, in terms of educational outcomes and the health, safety and wellbeing of all group members. The visit leader must be competent to manage the programme; in other words they must bring suitable expertise and experience to the tasks at hand and carry out those tasks in a common sense manner. The visit leader will generally be supported by other staff and volunteers who bring experience and expertise to the roles they carry out. For many activities the required level of competence is recognised by a specific qualification, appropriate to that environment.

As part of the risk assessment process the visit leader and other staff need to consider the extent to which they may need to intervene to prevent access to dangerous situations – for example near traffic, near water or where a fall from height could occur.

The visit leader may hand over responsibility for managing a particular activity to someone else who is qualified in that activity. This is frequently the case when groups visit an adventure centre for example.

See [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) (Risk Assessment)

### 4.1 Education and training for staff and volunteers

Courses on managing or delivering outdoor activities are available through Babcock Learning and Development Partnership. Training opportunities are also available through a wide range of other providers, including national governing bodies. Reference is made to course providers for activities listed in each section. Babcock LDP also provides educational visits co-ordinator training.

Babcock LDP [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)  
[www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training) Phone: 01364 631500

Current course information is posted on Evolve in addition to the Babcock LDP web sites.

### 4.2 Educational visits

Educational visits typically comprise activities where the risks encountered are similar to those experienced in every day life. For the purposes of this document they generally fall in Category A (see Section 2.5).

The former Department for Education provided *A Handbook for Group Leaders*. This handbook is aimed at anyone who leads groups of young people on any kind of educational visit. It sets out good practice in supervision, ongoing risk assessment and

emergency procedures. This booklet remains a good source of advice and guidance, and is available for download on [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) and on Evolve.

A wide range of curriculum resource materials for learning outside the classroom can be found on the Learning Outside the Classroom web site at [www.lotc.org.uk](http://www.lotc.org.uk)

The recommended minimum staffing ratio for educational visits is 1 adult to 15 pupils. There will, however, be many occasions where a higher ratio is required, informed by risk assessment (see Section 3.1).

#### **4.21 Visits to urban, coastal and countryside locations**

These visits will be Category A visits, so long as they take place within 30 minutes of a road or habitation, and do not include any adventure activities, as listed in section 4.5. The visit leader should be familiar with the general area the group will be working in and should brief the group before the visit and on site. Comfort and safety factors will apply to this environment although the visit leader does not need a formal qualification.

An initial briefing to group members may emphasise hazardous locations such as busy junctions, road crossings, wasteland, canals and other water side locations or narrow pathways.

Where groups are not directly supervised refer to the section on remote supervision (Section 3.17). Clearly explain meeting points and choose a location the group is familiar with. Emphasise the importance of time-keeping.

The leader may need to alert group members to the potential risks from other members of the public, for example, in public lavatories or subways.

For all visits:

- have a recall procedure
- consider footwear and clothing likely for the best and worst conditions you may face, including spare clothing should circumstances require
- negotiate or plan your route bearing in mind rights of way and access and the Countryside Code
- beware of the unexpected towards the end of the day or journey as your supervision or the attention of group members may relax
- consider health and hygiene issues (also see Section 4.24 farm visits).

Find details on the Countryside Code

<http://www.naturalengland.org.uk/ourwork/enjoying/countrysidecode>

Activities or fieldwork in or adjacent to rivers, lakes or other water features require particular care. This is especially the case in times of flood or where banks are slippery.

The former Department for Education provided *Group Safety at Water Margins*. This guide is aimed at anyone who organises learning activities that take place near or in water, such as a walk along a river bank or seashore, collecting samples from ponds or streams, or paddling or walking in gentle, shallow water. This booklet remains a good source of advice

and guidance, and is available for download on [www.babcock-education.co.uk/ldp/outdoorededucation](http://www.babcock-education.co.uk/ldp/outdoorededucation) and on Evolve

Particularly during summer months blue-green algae has been found at a limited number of sites in Devon, causing mild or severe illness where people are in contact with contaminated water. The Environment Agency in the South West can give you up to date information on affected sites. Environment Agency, South West Region, Manley House, Kestrel Way, Exeter EX2 7LQ. Phone: 08708 506506.

#### **4.22 Walking in non-remote environments**

Most coastal and countryside activities fall within Category A (see Section 2.5). However, the visit leader will need to take note of additional hazards when supervising groups in such environments. Training and qualifications for staff leading a group may be advisable or essential.

No formal qualification is needed to lead groups in coastal and countryside environments unless the programme is a Duke of Edinburgh Award expedition. This also applies to mountain or moorland environments below 600 metres and in summer conditions where activities take place within approximately 30 minutes of a minibus, other transport or place of habitation. Other comfort and safety factors will, however, need to apply as appropriate, for clothing and equipment, manageable group size, adequate communications and control of the group, informed by risk assessment. For further details see Mountain and Moorland activities, section 4.5, below. The course Coastal and Countryside Leadership (SWMMLTS) or Lowland Leader Award (MTE) is recommended.

Find training opportunities at:

[www.babcock-education.co.uk/ldp/outdoorededucation](http://www.babcock-education.co.uk/ldp/outdoorededucation)  
[www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training)

**Phone: 01364 631500**

Current course information is posted on Evolve in addition to the Babcock LDP web sites.

As with all activities the visit leader's judgement will be paramount. The activity or journey should be matched to the participants in terms of terrain, aims, distance, equipment available, clothing, weather conditions (both current and forecast), degree of supervision and time available. Group leaders should count students at regular intervals.

The leader should set a pace which allows for the speed of the slowest member of the group. The leader controls the frequency and duration of rests and rest periods should be appropriate to the whole group. Group leaders should set an easy pace going uphill and control the speed of the group going downhill. In forested areas keep away from active machinery or felling. Be aware of the hazards in woodland caused by severe winds. In cold or windy weather, or after a hard climb, put on extra clothing, even if the rest period is brief.

### 4.23 Beach and coastal safety

The local beaches and coastal areas offer a wide range of opportunities for study and activities. However, whilst presenting many challenges and interests, areas where the land meets the sea present their own hazards.

A high level of vigilance and supervision is needed when close to any stretch of water, even shallow water. The sea needs extra care and attention. When planning activities in coastal areas bear in mind that:

- tides, swell, wind, currents, beach profile and sandbanks may present difficulties -exit routes must be checked well in advance and at all times during the activity
- swimming should only take place as part of a carefully supervised activity conducted by suitably qualified leaders, no matter how inviting the sea may seem. Pupils should swim in company and in sight of supervisory staff
- paddling may be permitted where there is no intention or likelihood of swimming or of individuals getting out of control, provided risks have been assessed and there is adequate supervision. Group leaders who are supervising water-based activities should be competent in water rescue and life saving techniques including cardio-pulmonary resuscitation (CPR). Paddling is always clothes on, less than knee deep, with staff stood on the seaward side of the pupils.
- beaches present their own problems, particularly when large numbers of the general public are present. Establish a base where members of the group must return if separated from the rest. Look out for warning notices and flags
- be aware of the possible presence of dangerous debris such as glass, syringes, sewage, barbed wire or marker flares
- digging in the sand, particularly in cliffs or dunes could cause cave-ins
- climbing on rocky beaches and cliffs should be discouraged. On the South West coast a lot of rock is loose and crumbly. Do not work or base groups under such sites or allow young people to knock down or throw stones
- weed covered rocks may make surfaces very slippery
- Stay on the path on cliff tops. If the route is unfamiliar to the leader a responsible adult should be at the front. Cliff tops are exposed areas and may experience rapid changes in weather conditions. Young people should be briefed about significant risks, including cliff edges and should be appropriately supervised. Clothing, route choice and group management should reflect this.
- be prepared to seek advice from the coastguard, the Met. Office or from the LA via notes on Evolve visit forms. Only undertake activities and projects which you have the necessary experience and competence to manage.

For more information read *Group Safety at Water Margins* - [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) and on Evolve.

Information on swimming, other than in public pools, in open water, rivers, lakes and the sea, is included in the Outdoor and Adventurous Activities section 4.5.

#### **4.24 Educational visits to farms or industrial sites**

Visits to working farms are a regular feature of education for young people from both rural and urban environments. Such visits are beneficial to young people, helping them to appreciate the origin of their food and learn about aspects of rural life.

The Countryside Educational Visits Accreditation Scheme (CEVAS) accredits farm staff who are working with school groups and endorses the farm premises as being appropriate for school visits. <http://www.face-online.org.uk/cevas-introduction>

The Learning Outside the Classroom (LoTC) Quality Badge is available to farms through the CEVAS scheme.

The farm should also confirm they hold an appropriate level of public liability insurance, currently £5 million.

#### **The risks**

Experience over recent years shows that visits to farms can carry a small risk to young people of acquiring infection, particularly gastroenteritis. Several micro-organisms are commonly present in livestock animals and may cause gastroenteritis in humans. They may be found in faecal droppings and elsewhere in the farm environment. Farm visits may result in a risk of transmitting infection directly because the substance eaten is infected or contaminated. In addition, children's fingers may become contaminated with animal faeces which is then transferred to their mouths when eating or simply sucking their fingers or thumbs. Pregnant women are advised to avoid visits to livestock farms, particularly during lambing.

#### **Health and safety precautions**

Farmers and visit organisers need to be aware that visitors may be more susceptible to infection from the farm environment and its products than are those who live in that environment. Prevention depends primarily on simple hygiene measures which, if followed, will help ensure the visit is well-managed and safe. Parents, teachers and young people should be made aware of these measures and they should be re-emphasised before and during the visit.

For the farmer:

- The hazards that farms can pose to personal safety should be stressed to young people and teachers on their arrival.
- A high standard of physical and general cleanliness is required in all areas to be visited by young people.
- Plenty of fresh bedding should be provided for stock to minimise the risk of contact with dung. Areas should be hosed where appropriate.
- Sick animals - especially those with scour (diarrhoea) - must be isolated well away from visitors.
- Adequate hand washing facilities must be provided for visitors, including soap, running water and disposable hand towels (not roller towels). Toilet facilities should also be available.
- A separate clean area must be set aside for eating if refreshments are taken on site.
- Children should not be allowed to taste animal feed or raw milk.

- Safe areas for observing farm activities, such as milking, should be available.
- Slurry pits, chemical stores, electric fences, machinery, stacks of hay or straw and grain stores all present potential dangers and should be clearly identified as hazardous. Visits must be planned with due consideration to such hazards.

For teachers, parents and volunteers:

- Try to carry out a pre-visit to identify specific hazards.
- Ask young people with cuts or abrasions to cover them with a plaster.
- Provide a briefing for young people at the farm to cover the points in these guidelines.
- Ask young people to keep their fingers out of their mouths and not to eat refreshments until they have washed their hands.
- Young people should not sample, taste or take away any animal feed stuff or raw milk or drink from farm taps.
- Children should be closely supervised if direct contact with animals is likely. If this happens they should be made to wash their hands afterwards. They should not be allowed to kiss or put their faces close to the animals.
- Children and adults with asthma or hay fever may experience difficulty at certain times of year.
- Be aware of moving machinery, such as tractors, and do not allow children to touch any machinery or tools unless directly supervised.

Particular care must be taken by expectant mothers if visiting farms during lambing season.

Although the guidelines have been written with farms in mind, the general principles should be followed when visiting similar establishments such as zoos and wildlife reserves.

### **4.3 Sponsored walks and large scale events**

There are particular hazards associated with large scale events and from undertaking sponsored walks on roads. Check with local police where necessary. Consider alternative routes or means of achieving the same objectives, such as the use of a non-road environment or different activity.

For large scale events planned on Dartmoor contact the Recreation Officer at Dartmoor National Park on 01626 832093 or email: [recreation@dartmoor-npa.gov.uk](mailto:recreation@dartmoor-npa.gov.uk) to discuss your plans.

For other large scale events you may need to notify plans via Evolve or contact the Devon Health, Safety & Wellbeing Service, in the first instance, for additional guidance.

### **4.4 Use of external providers**

**(This includes providers of accommodation, activities, tours, expeditions and ski trips in the UK and overseas, specialist coaches and instructors)**

Schools and other establishments make significant use of centres and other facilities managed outside the control of the LA. The range of use extends from farm visits to pony trekking centres to the employment of individual specialist staff on an 'as needed' basis to



the use of large commercial activity centres and ski tour companies.

Schools are reminded of their continuing Duty of Care when using external providers. See sections 1.32 and 2.1.

It is not feasible for the council to approve or inspect external providers on a regular and systematic basis. **The LA does NOT keep a list of “approved” providers.**

Visit leaders should establish whether a provider:

- meets the standards of the Adventure Activity Licensing Service, and holds a current licence, where applicable and
- complies with the provider standards expected by the council, see Form SOE5, section 4.41 below or
- holds an Learning Outside the Classroom (LoTC) Quality badge, or other nationally recognised accreditation, for example from the Schools Travel Forum, or Expedition Providers Association.

Where the LA has received a completed SOE5 form from a provider, the Evolve web site will be updated to reflect this. School / establishments who subsequently choose to use this provider will not need to obtain an additional SOE5. However, visit leaders **MUST** read and check the form, posted on Evolve, to ensure that any AALA licences are up to date at the time of the visit, and that the relevant sections of the SOE5 meet their group’s requirement.

Schools and visit leaders should be aware that it is not a legal requirement for external providers to DBS check their staff, as they are not “specified establishments”. The SOE5 asks providers to confirm if they DBS check their staff. School staff must remain with their groups at all times if the provider’s staff are not DBS checked.

The *Activity Centres (Young Persons' Safety) Act 1995* applies to many centres and in particular to centres in the UK which offer the adventurous activities listed below to young people under the age of 18.

- Caving - other than underground passages principally used as show places open to the public.
- Climbing - except on purpose designed walls or towers.
- Trekking - including walking, pony trekking and mountain biking in moor or mountain country which is remote, for example over 30 minutes walking time from road or refuge.
- Watersports - canoeing, rafting and sailing when carried out on the sea, tidal waters or large, non-placid inland waters.

To check whether a centre is licensed by the Adventure Activities Licensing Service visit [www.aals.org.uk](http://www.aals.org.uk) or phone 02920 755715.

To check whether a provider holds an LoTC quality badge, visit

[www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

Schools Travel Forum is at <http://www.schooltravelforum.com>

#### **4.41 Provider Questionnaire –SOE5 Form**

If visit leaders plan to use external providers in this country or abroad they should check that the provider meets the standards expected by the LA. Form SOE5 can be used to confirm the provider meets these standards. These points should be considered when referring to these standards.

- Form SOE5 is not required where a provider holds an LoTC Quality Badge.
- Form SOE5 should be sent to the provider when making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.
- The satisfactory completion of the form does not necessarily signify that the service on offer will be appropriate for the young people from your establishment. A pre-visit to the centre and references from previous users or both will help you to decide if the centre will provide the right service, taking into account the age, abilities and needs of your particular group. It is important to establish whether a course of activities and experiences can be negotiated and designed to give a proper learning progression throughout the programme for your group.
- In particular, the SOE5 form does not check the quality of the provision, nor the financial stability of the company. See section 4.43 regarding overseas tour operators.
- The school is recommended to contact the Devon Health, Safety & Wellbeing Service in the first instance, if the visit leader has doubts following a centre's failure to answer the questions satisfactorily.
- The SOE5 form should be attached to the Evolve visit form.
- There is no need to ask for additional risk assessment from a provider who completes the SOE5 form, or who holds the LOTC Badge.
- It is important to distinguish between the role of a visit or group leader (from the school) and that of an instructor (from the provider). See Section 1.6 on Terminology.
- The aims and purposes of the venture should be agreed between the visit leader and the provider.
- The group leader or other staff should, where possible, be available to support the instructor during the activity and at periods between activities, such as lunch breaks.
- A list of names must be provided by the visit leader to the provider where a residential stay is involved. This should include other relevant information such as medical and dietary needs. It is not necessary to share full parental consent and contact information with the provider.

#### **Additional checks where the provider has delegated responsibility for supervising young people, member of school staff NOT present.**

- There must be a named visit leader (school staff) who remains the key person responsible for the pupils on this programme. The responsibilities of the visit leader are set out in Section 2.1 and 2.2, 3.14 and 3.1. In addition, the visit leader will:
  - plan and organise the programme;
  - engage and negotiate with the external provider
  - seek informed consent from parents
  - ensure correct approval procedures for the programme are followed. This should normally be through Evolve.

- Ensure the external provider completes the SOE5
- Ensure the external provider is aware of and will follow school procedures for incidents, accidents and major emergencies.
- Ensure the external provider is able to meet the pastoral responsibilities for the pupils
- Ensure the external provider is aware of and follows any other school specific procedures
- Monitor the actual delivery of the programme, including visits to off site events.
- Keep evidence of all of the above

See [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) (Planning an Off-Site Visit: Forms)

#### **4.42 Residential visits**

These may involve any organised activity which incorporates one or more nights away from home. Residential visits could involve a visit to a centre, a youth hostel or an extended stay on a narrow boat. The supervision of any group overnight involves additional responsibilities for the visit leader and other staff. (See Section 3.16 for information on supervision during residential visits.)

Residential visits in the UK that do not include an adventure activity are Category A visits. The selection of a reputable tour operator is recommended, where appropriate. This should form part of the risk assessment. Establishments should ask operators to confirm their safety management procedures and say if they have been externally verified. The School Travel Forum was formed in 2002 and has developed a code of practice which its members must adhere to, see [www.schooltravelforum.com](http://www.schooltravelforum.com) or hold an LOTC Quality Badge.

Residential courses where young people live and work together provide valuable learning opportunities and an exciting environment, but demand an awareness of safety factors.

If you plan to use an external provider of accommodation read Section 4.4 and use form SOE5 to confirm standards of provision meet council expectations.

- Dormitories should normally be for a group's exclusive use. However, risk assessment may allow flexibility.
- The visit leader should consider whether security arrangements are adequate to stop unauthorised visitors.
- Young people should be able to contact members of staff in the event of an emergency overnight.
- Supervisory staff should ideally be accommodated in rooms adjoining or close to their group.
- Young people and staff should know the lay out of the accommodation, key personnel, fire precautions and exits and necessary regulations and routines.
- Access should be available to groups' rooms at all times by members of the accompanying staff.
- Where accommodation is in tents, the visit leader should satisfy themselves that adequate security arrangements are in place.

#### **Fire safety**

Fire safety must be considered by the visit leader in any residential centre. Local

procedures, particularly for raising the alarm, evacuation of the building and location of the assembly point must be understood by all group members. Where no local procedures exist the visit leader should formulate them on arrival. If the group is abroad make sure any fire precautions are understood.

A fire drill should be held on the day or evening of arrival. The fire alarm must be audible throughout the accommodation. The visit leader should be confident that all emergency exits can be used as such. Keys must be readily available for any doors which are locked. A responsible person should have responsibility for each dormitory group and have a torch available should emergency lighting not be provided.

#### **4.43 Visits abroad**

Visits abroad provide valuable and rewarding educational experiences. They include cultural and language study trips, exchange programmes, activity programmes such as ski courses and expeditions. All visits abroad require detailed planning and preparation, well in advance of the visit.

Groups should seek to use the services of a reputable tour operator experienced in group travel. Air travel organisers may be licensed through ATOL (Air Travel Organisers Licence) for all or part of a package. It is recommended that establishments use tour companies which are members of a Department of Trade approved bonding body; such as the Association of British Travel Agents (ABTA) or the Association of Independent Tour Operators (AITO). Ensure you have ready access to your insurance company telephone number.

It is also recommended that groups choose where possible a tour operator that holds the LoTC quality badge, and / or is registered with the Schools Travel Forum. Additional checks may also be required to confirm the financial stability of the company. The form SOE5 should be used if the operator does not have hold the LoTC badge. These checks should be completed BEFORE any booking is made or deposit paid.

Also see Section 3.5 Transport and travel.

The *Package Travel Regulations 1992* may apply. Where schools independently provide a package they should ensure they act within the regulations.

In addition to the Planning checklist at the beginning of this booklet, visit leaders planning visits abroad should:

- Ensure they meet the required time scales for notification of the visit as set out in section 2.6
- identify whether there are medical requirements imposed by the country being visited
- ensure all participants have a European Health Insurance Card (EHIC) for all visits to member countries of the European Union – this is available from Post Offices at [www.ehic.org.uk](http://www.ehic.org.uk) or by phoning 0845 606 2030.
- ensure all members of the party carry the address and telephone number of the hotel or hostel in case of separation
- identify an emergency contact for parents

- brief young people about any local hazards and emergency procedures, including the use of telephones
- discuss any local customs and cultural issues
- agree codes of conduct with young people
- check visa and passport requirements - photocopies of passports and other essential documents may prove useful. A collective passport can be used for groups of between 5-50 young people. Everyone on the collective passport must be a British National.
- Consider language ability as part of their risk assessment.

For details about collective passports and other passport enquiries visit: [www.ips.gov.uk](http://www.ips.gov.uk) or phone 0870 521 0410

For visits to third world countries, or where there is uncertainty about safe practice, read the latest advice from the Foreign and Commonwealth Travel Advice Unit at: [www.fco.gov.uk](http://www.fco.gov.uk) Click on Travel Advice by Country.

Consider a number of 'what if' scenarios as part of the risk management process. Ask and answer questions such as 'What would I do if... a young person got lost, was ill, was caught shoplifting and arrested or lost a passport or the group was stranded due to transport failure?'

A minimum staffing ratio of 1 adult to 10 group members is recommended for visits abroad. In normal circumstances each party should be accompanied by two adults, at least one of whom should be a member of employed school staff.

On visits abroad and exchange programmes schools should consider providing pupils with a brief statement in the language of the country they are visiting describing the context of the visit. This might also show the name and contact number for a member of staff who speaks the language. These details should be carried by pupils at all times.

#### **4.44 Exchange visits**

The success of a foreign exchange is largely dependent on good relationships and planning and communication with staff in the host school or youth group.

In particular visit leaders should:

- check the status of the exchange programme provider to ensure they are a legitimate organisation, with links to a professional or governmental body
- seek information about the exchange school and the accommodation and guardianship to be provided
- seek reassurances from the host school about procedures for checking the suitability of host families – particular care should be taken if external agencies are used to recruit host families
- consider whether the individuals undergoing the exchange are suitable and able to cope with the change in culture and separation from home
- ensure all group members have easy and accessible contact in the host country, preferably by telephone with a member of their own staff - mobile phones can be very useful for this
- make young people aware of the ground rules agreed between the visit leader and the host family
- ensure home stay exchanges are well-planned, with sensible pairing arrangements

- for reciprocal home stay exchanges in the UK liaise with the school's child protection officer to help ensure the suitability of hosting arrangements
- within the UK inform host families that DBS checks may be carried out on a sample basis and if anyone is not happy about this arrangement then they should not agree to take part. This provides an important deterrent effect and enables DBS checks to be carried out if necessary
- provide host families with details of medical or dietary needs
- make sound arrangements for collecting and returning members of the party
- brief young people regarding emergency arrangements and encourage contact with their staff in the case of anxiety or concern.

Additional information about good practice on exchange visits has been produced by the Outdoor Education Advisers Panel at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) in the section on overseas visits, and on the Evolve web site.

#### **4.45 Overseas expeditions**

Expeditions by schools to remote areas, and to developing countries, are becoming increasingly common. Such expeditions should be undertaken with great care to ensure that the objectives are clearly identified and reasonable, group members have appropriate prior experience to cope with the challenges of the programme, the expedition is led by appropriately competent leaders and emergency arrangements are suitably thorough. Leaders should consider value for money and the extent to which such an opportunity provides sound educational benefits. Parental consent must be based on a thorough explanation of the intended programme by the provider including travel and accommodation arrangements, all planned or possible activities and associated risks.

Plans to take part in overseas expeditions should be notified to the Adviser for Outdoor Education via Evolve at the planning stage, before a contract is agreed with any external company.

- Find detailed guidance on the Babcock LDP website at:
- [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) in the section on overseas visits.
- Further advice is available through the Young Explorers Trust at: [www.theyet.org](http://www.theyet.org)
- Groups are recommended to use an operator / provider that is a member of the Expedition providers Association (EPA) and / or holds an LoTC Quality Badge. See [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) and for the EPA visit [www.epa.uk.net/](http://www.epa.uk.net/)
- Geography Outdoors: the centre supporting field research, exploration and outdoor learning (formerly the Expedition Advisory Centre) provides information, training and advice to anyone involved in expeditions, field research or outdoor learning in the UK and overseas. See [www.rgs.org](http://www.rgs.org) This includes a training course, Overseas Expeditions and Fieldwork, run with LAs.

## 4.5 Outdoor and Adventurous Activities

This section relates to where teachers and other leaders (youth leaders, care workers etc) are leading an adventure activity themselves. The guidance may also be used by an external provider to ensure they are working to the standards expected by the LA. See form SOE5 and section 4.4.

Outdoor and adventurous activities may not necessarily require specific qualifications but will need teachers and other staff to exercise professional judgement. Almost all Category B activities will require a qualified leader. Staff should also know general requirements regarding what young people should be taught to ensure safe practice. This includes how to lift, carry, place and use equipment safely and how to warm up and recover from exercise.

Young people should be taught to take increasing responsibility for their own and others' safety. This may include particular hazards in school grounds, surfaces, school traffic, systems of recall and avoiding falls during specific activities.

In principle the guidance in this booklet follows that provided by individual National Governing Bodies (NGB) and the guidance and requirements of the Adventure Activity Licensing Regulations. Leaders of all activities should be working within the terms of reference of their national award. However, in some cases National Governing Bodies (NGB) guidance has been adapted to take account of the role of staff supervising activities, rather than carrying out a coaching role.

Leaders planning to undertake activities which are not listed below should comply with national governing body guidance, where it exists, and, where necessary, seek additional advice in the first instance from Devon Health, Safety & Wellbeing Service. Where activities are carried out as part of a programme of physical education leaders should see guidance provided by the Adviser for Physical Education on.

Generic risk assessments for most activities can be provided on: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) and the Devon visits web site (Evolve) on: [www.devonvisits.org.uk](http://www.devonvisits.org.uk).

### 4.51 Register of approved leaders for outdoor activities

Leaders of activities are required to upload their award onto Evolve and include that information in the Activity Leader Form (ALF) on the Evolve Visit Form. No other register of awards is kept by the LA. Green Cards and associated codes are no longer used.

### 4.52 General guidance for all water based activities

The local area provides rich opportunities in the natural environment for young people and adults to participate in a wide variety of water based activities. However, there are obvious hazards, so qualifications and codes of practice developed by the National Governing Bodies, including the Royal Yachting Association (RYA) and the British Canoe Union (BCU), provide important safeguards for sound and safe participation.

The greatest danger in any water sport is drowning and being immersed in cold water is a major contributing factor in drowning fatalities in this country. Exposure is also a very real hazard.

### **Additional controls and safety factors**

- A Personal Flotation Device (PFD) – such as a buoyancy aid or lifejacket must be worn at all times by group members and leaders. Surfing is an exception to this, see the specific surfing guidelines. The leader must know the appropriate buoyancy aid or life jacket to suit the specific activity, individual and location. All PFDs must comply with appropriate current standards, which are the EN390 series, or BS EN ISO 12402 series. National Governing Body web sites include details of current standards. The buoyancy aid must fit, be in good condition, and preferably tested checked periodically to ensure it remains fit for purpose.
- Helmets should be worn according to National Governing Body guidelines for the activity, and a local risk assessment.
- All boats and boards should be in good condition, have adequate buoyancy, be suitable for the activity and the right size for the participant. It is the responsibility of the leader to check all equipment before the activity.
- Clothing must be suitable for the conditions and spare clothing should be carried or readily available. Wet suits or dry suits may be appropriate in certain circumstances.
- Footwear should normally be worn for water based activities. Surfing may be an exception.
- First aid equipment and appropriate emergency equipment must be carried or be immediately to hand (in the safety boat) at all times.
- All leaders of water activities must have a current first aid award appropriate to their National Governing Body qualification and to the environment they are working in. (See Health and first aid 3.2)
- Weather and water conditions can make normally safe areas unsafe. Leaders should be aware that at all levels normal water and weather conditions are implied. The leader should also be aware of rips, currents, the particular effects of wind in that area, and relevant local bye laws.
- The leader is always responsible for the whole group.
- The leader should leave details of their activity with a responsible adult on shore, with instructions for action to take if the party is late.
- Leaders need to take common sense precautions for water quality. Using recognised sites will minimise risks. Cuts should be protected with plasters. It is good practice to shower after water based activities. Should illness or 'flu like' symptoms develop immediately or after a few days, participants should consult a doctor. Any incident of Weil's Disease should be reported.
- Individuals taking part in adventurous water based activities should normally be able to swim 50 metres in light clothing. Discretion may be exercised, in accordance with the instructor's training and experience, where special circumstances exist. Water confidence for the proposed activity may be more appropriate than the ability to swim 50 metres. In addition, trained instructors working in a controlled environment may safely introduce some non-swimmers to such activities.

### **Weather forecasts**

Leaders should obtain a recent forecast prior to the activity, and check for changing conditions during the activity. Off shore winds are a particular hazard.

- Both the BBC and Met Office web sites provide specialist mountain, moorland and marine forecasts. There are numerous other sites.
- See [www.metoffice.gov.uk](http://www.metoffice.gov.uk) for all weather information.



- The South West page has a specific Dartmoor and Exmoor National Park forecast, [http://www.metoffice.gov.uk/weather/uk/sw/sw\\_forecast\\_weather.html](http://www.metoffice.gov.uk/weather/uk/sw/sw_forecast_weather.html)
- The BBC site has a special marine section: [http://news.bbc.co.uk/weather/coast\\_and\\_sea/](http://news.bbc.co.uk/weather/coast_and_sea/)

## 4.53 Activities, leader competence and safety factors

Activities are listed as follows:

- Air activities (other than commercial flights)
- Boating – rowing, water-skiing, jet skiing, fishing from a boat
- Bushcraft, Woodland activities, Forest School, Earth Education etc.
- Camping
- Caving / Mine exploration
- Climbing, Abseiling, Use of Climbing Walls, Traversing Walls, Tyrolean Traverse
- Coasteering / coastal scrambling / sea level traversing
- Cycling
- Fishing
- Gorge / river Walking and scrambling
- High Level Ropes Courses, including use of Go Ape
- Horse Riding and Pony Trekking
- Mountain and Moorland (including Ten Tors)
- Motor sports
- Orienteering
- Paddlesports – Canoe, Kayak, Stand up Paddleboards
- Paintball
- Rafting – including improvised raft building
- Sailing, Windsurfing, kitesurfing
- Shooting and Archery
- Snowsports – including dry slopes
- Snorkel and Sub Aqua
- Surfing
- Swimming other than public pools

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### Air Activities

Included in this section are gliding, hang gliding, flying (except commercial flying), parachuting and other air based activities. These fall within Category C, which means that details must be notified via Evolve.

The council's insurers do not provide insurance cover for air borne activities. For these reasons the council will need visit leaders to ensure the provider of the activity has public liability insurance and that participants consider their own needs in terms of accident insurance.

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## **Boating – rowing, water-skiing, jet ski, fishing from a boat etc**

### **Rowing**

This activity should normally be undertaken with an established club or provider. Form SOE5 should be used to ensure that the provider meets the standards of the LA.

### **Water skiing and associated activities**

- Water skiing and similar activities, such as banana rides and wake boards, should only be offered to groups through registered operators, and **not** on private boats.
- The National Governing Body for water skiing is the British Water Ski Federation (BWSF): [www.britishwaterski.org](http://www.britishwaterski.org)
- The BWSF runs an approval system for water ski schools, and has an established Ski Boat Driver Award (SBDA).
- Banana rides or similar are often offered as an additional activity by sailing schools. The school should have in place minimum standards of competence for the driver, such as the SBDA or RYA level 2 certificate, backed up by additional training. Ski boats should always have a second person, or 'spotter' to watch the skier or riders and assist the driver.

### **Jet skiing (personal watercraft)**

- This activity should only be offered to groups through registered organisations, and **not** on private craft.

The National Governing Body for personal watercraft is the RYA. The RYA register and approve centres and schools and have an award system for instructors: [www.rya.org.uk](http://www.rya.org.uk)

### **Sea fishing from a boat**

When a private or hired boat is being used the leader or skipper must be qualified in safety and power boat handling or equivalent, and all members of the party must wear an appropriate personal flotation device (buoyancy aid or lifejacket). The boat must be fit for purpose and carry appropriate equipment. This could include; a life raft, radio, flares, first aid kit, additional anchors, water, shelter and spare clothing. The leader must have an established emergency action plan, and it may be advisable to notify the coastguard. The boat owner / skipper should complete the SOE5 form, and in particular hold appropriate Public Liability insurance.

For commercial boats, the skipper and the boat must both be licensed by the local authority, and must comply with the Maritime and Coastguard Agency relevant Code of Practice Certification. The skipper must hold a Commercial Endorsement. The skipper should brief the participants on behaviour and safety points. Form SOE5 can be used.

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## **Bushcraft, Woodland activities, Forest School, Earth Education etc.**

These programmes cover a wide range of venues and activities. They range from simple art based sessions in school grounds, for example, to fire lighting, shelter building and the use of tools in remote woodland.

The activities will be in Category A where they do not involve the use of fires or edged tools, AND take place in an accessible location, such as school grounds, or local woodland with access by vehicle. Activities will be Category B where fires and / or edged tools are used, OR the activity takes place in a relatively remote environment.

### Activity leader competence

Groups may buy into programmes run by external providers. Form SOE5 should be used to ensure that the provider meets the standards expected by the LA.

Where Devon or Torbay leaders run the activity, the leader competence should be determined on a case by case basis, according to the activity, venue, planned programme and type of group.

- Where the planned sessions does not include the use of edged tools (including but not limited to knives, axes, saws, bill hooks etc) or fires, and is in an accessible location, the leader may not require any specific additional award other than their qualification as a teacher or youth leader PLUS experience of the activity.
- The use of edged tools require the leader to have specific training and competence.
- The use of fires requires the leader to have experience and preferably additional training.
- Leaders are encouraged to undergo specific bushcraft / forest school training
- Sessions in remote locations (more than 30 minutes from a road or refuge) require the leader to have a walking / trekking award appropriate to the venue, for example, Summer Moorland Leader, Summer Camping Leader.
- Woodlands can present additional risks, particularly in windy conditions. Leaders should be confident in assessing these risks and choosing suitable locations.
- Where a programme is titled “Forest School” the leader running the programme should hold a Forest School leader award.

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## Camping

(Also see Mountain and Moorland Activities)

### Introduction

Camping is a particularly rich activity in the variety of positive educational experiences it offers. It does however require considerable organisation. It may involve large scale multi-day standing camps, single overnight remote backpacking expeditions, a bivouac or may be carried out in conjunction with other activities such as canoeing or cycling.

It is an activity which offers ready access to stimulating areas working in close co-operation with others with great freedom and flexibility. As such it requires purposeful planning for that freedom to be safely enjoyed by all.

### Activity leader competence: camping

Hazard level	Group instructor or leader
Coastal and countryside	Relevant experience

locations (Use of stoves managed by staff)	<b>NB. This is a Category A visit. All others below are Category B visits.</b>
Coastal and countryside locations (Use of stoves managed by group)	Coastal and Countryside Camping Endorsement or Summer Moorland Camping Leader (SWMMLTS) or Level 3 Award in Basic Expedition Leadership (Sports Leader UK) or Walking Group Leader Award (MTE) with camping endorsement * or Lowland Leader Award with Expedition module (MTE)*
Moorland terrain (summer)	Summer Moorland Camping Leader (SWMMLTS) or Walking Group Leader with moorland camping endorsement (MTE)* or Hill and Moorland Leader with Expedition module (MTE)*
Moorland terrain (winter)	Summer Moorland Camping Leader and Winter Day Walking (SWMMLTS) or Walking Group Leader with moorland camping endorsement (MTE)* or Hill and Moorland Leader with Expedition Module (MTE)*
Mountain terrain	Summer Mountain Leader Award

\* The camping endorsement referred to here can be either the MTE Expedition Module offered as an additional bolt on to the WGL /Hill & Moorland Leader, OR the SWMMLTS Camping Endorsement.

The MTE is introducing a series of new awards, and renaming others. From April 2014, the WGL will be renamed the Hill and Moorland Leader, and there will be a new lowland award, the Lowland Leader Award. Full details of these awards from [www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training) and [www.mountain-training.org](http://www.mountain-training.org)

### Recommended staffing ratios

- A minimum of 1:12 is recommended. Additional adults with appropriate experience may extend this ratio, subject to risk assessment by the leader.
- Mixed parties will generally be supervised by staff of both sexes. However, discretion may be exercised regarding the remote supervision of expeditions in which case the Head must give their specific approval.
- Large groups may need to be supervised in smaller units.

### Additional controls and safety factors

- The suitability and condition of equipment should be checked prior to departure and on return.
- Leaders should teach basic camp skills, such as use of stoves, prior to a camp.
- Access and permission arrangements need to be established.

- The site should be left in a condition as near as possible to that in which it was found.
- The use of candles should be discouraged. If they are to be used their safe use should be discussed.
- Group members may need to be shown how to plan menus and cook. A satisfactory diet is important for morale and safety.
- It is the leader's responsibility to ensure a good standard of hygiene. All group members should be aware of washing areas, toilet areas, water collection points and rubbish disposal and related environmental considerations.
- A set of camp rules should be considered which might include activities near tents, tidiness and noise. Hazards within the area of the camp should be identified.

### **Stoves and cooking**

- Stoves are potentially hazardous. Accidents have occurred from their mis-use, particularly when re-fuelling.
- Gas canisters should be changed well away from any flame and should not be changed in tents. If gas type stoves are used they should have a re-sealable valve outlet.
- The Trangia meths burner unit should be re-fuelled with a purpose designed container, such as the Trangia safety fuel bottle. Do not use the plastic containers in which the meths may have been sold. The use of a second, exchange burner unit will minimise risks for younger or inexperienced individuals. The Trangia burner must be extinguished and cool prior to refuelling.
- Discuss the design, use and siting of stoves and practice their use in daylight conditions, prior to the expedition if individuals have no previous experience.
- Each person should receive training in using stoves and have their competence assessed.
- Individuals should be taught how to deal with flare ups.
- Mark fuel containers. Store them in the shade in a cool area.
- Young people should not use stoves fuelled by petrol.
- Cooking should be done outside and away from tents.
- If experienced individuals are cooking in tent doorways a knife to cut the tent or second exit must be available.
- Standing camps will normally have separate kitchen tents.

### **Recommended stoves for light weight camping and expeditions are:**

- Trangia-type methylated spirit stoves, with care needed on refuelling and careful storage of fuel
- gas stoves with a re-sealable valve outlet using propane and butane gas mix.

### **Training opportunities and additional information**

- Mountain Leader Training England [www.mountain-training.org](http://www.mountain-training.org) *Hillwalking: The Official Handbook of the Mountain Leader and Walking Group Leader Schemes.*
- South West Mountain and Moorland Leader Training Scheme Syllabus [www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training)
- Sports Leaders UK – they administer the Level 3 Award in Basic Expedition Leadership (BEL) [www.sportsleaders.org](http://www.sportsleaders.org)

# Caving and Mine exploration

## Introduction

Caving is the exploration of natural and sometimes mined underground systems and a primary motive should be the desire to learn about such places. Devon has a variety of cave systems particularly centred around the limestone of the Buckfastleigh area. The caves of the Mendip Hills provide a nearby extension to these opportunities, for those qualified to lead groups in this area. Groups must abide by current access agreements.

Groups may buy into programmes run by external providers. Form SOE5 should be used to ensure that the provider meets the standards expected by the LA.

## Activity leader competence: caving

All leaders of caving activities MUST hold the appropriate NGB award for the cave concerned. The award must be added to the Evolve system, and attached to the Activity Leader Form (ALF) for the Visit.

## Training opportunities and additional information

- The National Governing Body for caving is the British Caving Association.  
<http://british-caving.org.uk/>
- *The Local Cave and Mine Leader Award Assessment Handbook* provides detailed background to the scheme and is available from the BCA website.

## Recommended staffing ratios

- For caves with no technical difficulty and no wet sections one qualified instructor who holds a minimum of the LCMLA Level 1 may lead groups of up to 12 students. A second responsible adult, who has previous experience of the cave, should accompany the group.
- For more technical caves the number in the party should not exceed a ratio of 1 qualified leader to 6 students. Each party should have an assistant or second member of staff.
- The minimum party size should be four. Group size should be small both for mobility underground and so that each person is able to be an integral member of the group.

## Additional controls and safety factors

- The leader should have previous experience of the caves that groups are taken in to and associated access and accident procedures.
- Mines present particular hazards which require more detailed background information prior to any visit, in terms of false floors, stacked waste rock, unsafe timbering, deep water and structural instability. The possibility of poisonous gases and discarded materials should also be considered. Radon hazards in mines in the West Country are particularly significant. Visits to mines must be considered in the light of currently available radon readings.
- The leader should be familiar with current information related to radon hazards in mines or caves which are used.
- Leaders should set examples and impress upon their parties the need for conservation in caves. The principle of minimum impact, when to avoid caves, care of stalagmites, removal of any litter and care for the local flora and fauna should form part of an all round education in cave conservation.

- Each caver should have adequate warm clothing with protective outer garment, a helmet conforming to British Standard with 'Y' chin strap and lamp bracket, an efficient head lamp and suitable footwear such as wellingtons or stout boots without hook lacings.
- Group equipment should include emergency food, spare lighting, a first aid kit, knife and whistle. A group shelter sufficient for all members of the group should be carried, or individual bivi-bags. Additional equipment should be considered as appropriate to the trip including life-lines when there is danger of a fall.
- The group leader should be sensitive to the physical and psychological condition of all group members and have an established system of communication within the group.
- Information about the proposed trip should be left with a responsible adult who will be clear about emergency procedures in the event of the group not returning. An indication of the groups' presence in the cave should be left at the cave entrance.
- Preparation may need to include surface training and should include a briefing and equipment checks.
- A weather forecast should be obtained for any cave in which there is any danger of flooding.
- The group leader should identify any medical conditions within the group prior to the activity.

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## Climbing, Abseiling, Use of Climbing Walls, etc

### Introduction

This activity covers rock climbing, abseiling, the use of climbing and traversing walls, and tyrolean traverses.

### Activity leader competence: climbing

Hazard level	Group instructor or leader
Climbing walls - local and academy based climbing walls	Devon County Council Climbing Wall Supervisor Or CWA (MTE)
Climbing walls - commercial or privately run	Devon County Council Climbing Wall Supervisor Or CWA (MTE) Or CWLA [Leading Module of CWA ](MTE), depending on local requirements
Single pitch crags less than 30 minutes from road or refuge - non-tidal	Single Pitch Award (MTE)
Single pitch crags less than 30 minutes from road or refuge - tidal	Single Pitch Award (SPA) and risk assessment for the site regarding tides
Multi-pitch climbing	SPA and local assessment or Mountain Instructor's Award (MIA)
Single or multi-pitch	Summer Mountain Leader and SPA and local

climbing more than 30 minutes from road or refuge	assessment or MIA
Tyrolean traverses  These can be improvised, or semi permanent. They can be between trees, over rivers and across gorges	Appropriate life saving and rescue skills <b>and</b> Single Pitch Award <b>and</b> relevant prior experience and training in use of a Tyrolean

## Rock Climbing and Abseiling

### Recommended staffing ratio for use of natural crags

- This will depend on the level and purpose of the session and the experience of the participants.
- An introductory session will be difficult to manage if the ratio exceeds 1:8.
- On multi-pitch climbs 1:2 is a minimum recommended ratio.

### Additional controls and safety factors for natural crags

- Rock climbing with young people should be introduced in easy stages, allowing for an early appreciation of basic skills and procedures.
- Where appropriate, beginners should experience the effects of holding another climber on a rope and of being held themselves.
- A safety rope should be used when abseiling.
- Approved protective helmets should be worn.
- The use of equipment should be monitored each session and throughout the year.
- There should be a systematic approach to checking and maintaining equipment, informed by manufacturers' guidance. Records should be kept of important safety checks, and any equipment showing undue signs of wear should be discarded.
- All climbing equipment should carry the CE standard.

### Climbing walls

Recreational climbing on walls has become an activity in its own right. Climbing walls also complement opportunities to climb on natural crags and boulders and offer new opportunities for teaching and practice. They may incorporate artificial structures adapted for climbing

### Additional controls and safety factors on climbing walls

- Other than low walls only used for traversing, climbing walls should only be used under the supervision of an individual with the appropriate qualification, : Devon Climbing Wall Supervisor or CWA or SPA depending on the complexity of the wall and local conditions of use.
- Instructors should follow recognised practice and conform to conditions of use at individual climbing walls, including use of helmets and other equipment where recommended.



- There should be a progressive programme of training, allowing students to develop and master the skills of belaying in low risk situations, before they take greater responsibility for other students when peer or team belaying on the wall.
- As a guide, we recommend that for teaching, one supervisor should oversee no more than five active ropes, working on a ratio of one appropriately qualified member of staff per 15 pupils. This could be a maximum of 5 lines with 3 persons per line. However, this must be informed by local risk assessment. A qualified member of staff supervising the group must be able to intervene quickly and effectively if they need to. Young people with less experience in peer belaying will need closer supervision.
- Belay methods need to be appropriate to the group's level of experience. For most students a second belayer 'tailing' the rope (holding the rope and acting as an alert back up to the belayer) is essential.
- Equipment should be of the same standard as for other forms of climbing.
- On Council property the design of artificial walls must be approved. The Head of the establishment should ensure that any wall fixtures, particularly anchor points, are inspected regularly and the inspections recorded. A prominent notice should be displayed to the effect of, '**Do not use this wall without permission**'.

### Inspection/Testing requirements for Artificial Climbing Structures (ACS)

The inspection/testing requirements for Artificial Climbing Structures (ACS) that are detailed in the BSEN12572 standards changed in 2007. Since then the new standards identify 3 levels of inspection and it is recommended that a system of inspections is undertaken on the following basis:

- **Routine Visual:** by teachers or climbing wall supervisor's each time the wall is used (usually daily, not documented). If any defects are apparent this may result in not using that part of the wall until the defect is rectified. A verbal or written report should be made to the manager of the wall or the Head of Physical Education;
- **Operational** (every 1-3 months dependent on usage by wall managers - documented) noting any defects, loose holds or potential weak points within belay fixtures;
- **Annual Formal Inspection ("structural")** inspection (documented by an independent competent person conversant with test methods described in 12572). A site visit should be undertaken by a competent inspector to assess the integrity of belay and other permanent fixtures, including the integrity of the wall. This should be carried out at least once every year or when any concerns are apparent or when significant amendments to the wall are proposed.

Whilst the frequency of the main formal inspection depends upon the manufacturer's recommendations, all the manufacturers (including all members of the Climbing Wall Manufacturer's Association -CWMA ) require that a formal ('structural') inspection is carried out **annually**. The CWMA ([www.cwma.co.uk](http://www.cwma.co.uk)) can be contacted by schools to arrange competent inspectors to carry out annual formal inspections or alternatively arrangements can be made through the firms listed further below. It is worth noting that for newer climbing walls there may already be an inspection arrangement in place with the firm responsible for design and construction.

### Community use of climbing walls

- Participants should be informed about the risks of climbing and should confirm that they are aware of, and consent to, those risks.
- Suitable arrangements must be in place to supervise community use of the climbing wall where young people under the age of 18 take part.

### **Traversing walls**

Traversing walls encourage balance, co-ordination and movement in curriculum time or as part of lunch-time and break time activities. Using some or all of the holds young people may set themselves challenges appropriate to their own ability. As the name implies, traversing walls are designed to allow movement along, rather than up, the wall. A traversing wall does not need specialist climbing equipment or specially qualified supervisors; it provides 'low level' climbing.

- Follow manufacturer's guidance for fitting holds. Extra holes may be drilled and sleeves fitted, to allow swapping and movement of holds.
- Provide holds of different colours, sizes, shapes and locations.
- Risk assess the location of the wall:
  - consider the surface at the foot of the wall and ensure there are no obstacles such as drains or kerb edges which young people are likely to step down onto awkwardly
  - consider the location in terms of any immediately adjacent activities
  - a protective surface should generally be considered where the highest footholds are more than 600mm off the ground - protective surfacing is not a legal requirement but should be considered as part of your risk assessment for the wall and its use
  - consider ease of supervision and observation for things like lunchtime use.
- Check the holds on a regular basis to see if any have become loose, and tighten where necessary. Ask group members to report any loose holds.
- Young people should be informed about good practice (and may be able to draw up their own code of practice) including:
  - give people on the wall time and space to move on
  - don't stand immediately behind or directly below someone who is on the wall
  - be considerate towards other people on the wall
  - use sensible footwear.

### **Tyrolean Traverses**

These can be improvised or fixed. They can be between trees, over rivers and across gorges.

The leader / instructor should hold the Single Pitch Award, and have experience and prior training in use of a Tyrolean. Where the traverse crosses water, the leader should also have appropriate life saving and rescue skills.

### **Additional controls and safety factors for Tyrolean traverses**

- Ensure belay points are sound.
- Protect trees used for belays.
- Protect the rope and slings when used round rocks to minimise the cutting potential when pulled into cracks as the rope is tensioned.
- Always use two ropes to set up the Tyrolean, rather than relying on one rope.
- Where the traverse is low, use two static ropes, as if one shears a second dynamic rope will simply dump the person on the ground or in the water with the stretch.

- Avoid using jamming devices in tensioning ropes as these can damage the sheath or tear through the rope.
- As part of the site risk assessment check to see that take off and landing points are appropriate so that banks or cliff edges are not hit on take off and arrival.
- Ensure that clipping on and off can happen without over-reaching by the person on the traverse or staff.
- Ensure good group supervision at cliff edges or water margins.
- Have a throw line available for use near deep or fast flowing water in case any party member falls in.
- Appropriate briefing should be given to group members.

### **Training opportunities and additional information**

- Find more information about training and assessment opportunities at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)
- For information, advice and guidance regarding the use of climbing walls (Devon) please contact the LDP Physical Education Team 01392 287240 [ray.hennessy@devon.gov.uk](mailto:ray.hennessy@devon.gov.uk)
- The MTE provides site specific *Climbing Wall Guidance Notes* which have informed the development of the local scheme.
- The Adventure Activities Licensing Service has guidance on peer and team belaying at: <http://webcommunities.hse.gov.uk/connect.ti/adventureactivitiesnetwork/view?objectid=493093>
- Guidance on selecting, using and caring for equipment is in the British mountaineering Council (BMC) pamphlets on equipment at: [www.thebmc.co.uk](http://www.thebmc.co.uk)
- The leader should have a clear understanding of environmental and access issues in general and those relating to using individual areas. Guide books, the BMC pamphlet *Tread Lightly* and the Countryside Code provide background information. See [www.thebmc.co.uk](http://www.thebmc.co.uk)
- See BMC club guidance notes for information on community use of climbing walls and other club based information: [www.thebmc.co.uk](http://www.thebmc.co.uk)

## **Coasteering, Coastal scrambling, Adventure Swimming etc**

### **Coasteering**

Coasteering is an Adventure Activity (Category B) and involves traversing along a stretch of intertidal zone, often as part of an organised group activity. Participants travel across rocks and through water, using a variety of techniques including climbing, swimming and jumping into water. Coasteering guides and participants wear appropriate clothing and equipment while undertaking coasteering activities.

It should be noted that coasteering can be offered under other names, such as Adventure Swimming, Coastal Exploration, Sea Level Traversing etc. Leaders should check carefully what the activity includes when using an external provider.

The National Water Safety Forum's Beach Advisory Group – Working Group for Coasteering Safety (members include: RNLI, RoSPA, MCA, RLSS UK, SLSGB, AALS, AAIC, coasteering providers, governing bodies and associations) has formed the

National Coasteering Charter (NCC). The NCC represents the coasteering “industry” and has published Best Practice Guidelines plus information on competency for Coasteering Guides. These documents are available on [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) and on Evolve. Much of the content is based on AALS’s safety checklist for combined water/rock activities – C/Int34v10. [www.aals.org.uk](http://www.aals.org.uk)

Groups undertaking coasteering and similar activities may use an external provider, ensuring that the provider holds an AALA licence, AND completes the SOE5 or holds an LoTC quality badge.

Where the activity will be lead by a Devon or Torbay leader, the following will apply:

- The leader must hold a “certificate of competence” issued for the site to be used by an appropriate technical advisor. This must be added to Evolve, and to the visit form ALF.
- The technical advisor must be agreed with the LA
- The activity should be run in line with the NCC guidance.
- Clothing and equipment should be carefully considered. A buoyancy aid should be worn if there is a likelihood of being in the water and wet suits may be required.
- Helmets should be worn.
- The group leader needs to be aware of local conditions, including tides and currents.
- Access and exit points need to be considered. Emergency procedures should include alternative exits and escape routes.
- The group leader should carry out a visit to the site, to assess risks and consider the suitability of the site before using it with group members.
- There should be clearly identified cut off points, for temperature, and tide height, beyond which the activity does not take place.
- Leaders should exercise caution before allowing participants to jump into the water. It may be appropriate for the leader to test the jump and the exit point.
- Leaders should be aware of the effects of cold water, and that someone may panic, and ensure appropriate safeguards are in place.
- See also section 4.52 “Water Based Activities”

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## Cycling

### Introduction

The local area has an extensive road network and a wide range of off-road cycle routes and bridleways. Cycling provides great opportunities for independent journeying. An awareness of traffic hazards on all roads and how to avoid such hazards must, however, be a priority. Environmental damage and erosion is a major concern, particularly on Dartmoor and should be kept to a minimum. Respect should always be shown to other users of the countryside.

Where cycling takes place on public roads, or on non technical cycle trails, such as the Tarka Trail, Granite Way, or the “Discovery” routes at Haldon Forest, the activity will be Category A. Technical trails, and trails in remote country, will be Category B.

### **Activity leader competence: cycling**

There are a number of national awards for cycling, and leaders are strongly encouraged to obtain an appropriate national award. Where a leader does not hold an award, they must be able to demonstrate appropriate, recent and relevant experience in cycling in the environment to be used.

A remote country walking award may also be required, if the cycling is to take place more than 30 minutes walk from a road or habitation. In this case, the award must be added to the Evolve system, and attached to the Activity Leader Form (ALF) for the Visit.

Leaders should hold a current first aid certificate.

### **Training opportunities and additional information**

- Devon County Council provides one day cycle instructor courses through the Road Safety and Travel Awareness Team.  
[www.devon.gov.uk/cyclists](http://www.devon.gov.uk/cyclists)
- Devon Outdoor Learning provides trail leader awards.  
[www.devon.ldp.org/outdoorlearning](http://www.devon.ldp.org/outdoorlearning)
- BSCA British Schools Cycling Association [www.britishcycling.org.uk](http://www.britishcycling.org.uk)
- OTC Off Road Training consultancy [www.otc.org.uk](http://www.otc.org.uk)
- MIAS: Mountain-bike Instructors Award Scheme  
[www.mountainbikeinstruction.co.uk](http://www.mountainbikeinstruction.co.uk)
- BOB British Off-road Biking [www.britishoffroadbiking.co.uk](http://www.britishoffroadbiking.co.uk)
- Details of current awards in cycling leadership can be found on the Adventure Activities Licensing Service web site [www.aals.org.uk](http://www.aals.org.uk)

### **Recommended minimum staffing ratios**

- 1:10. This may need to be improved, informed by risk assessment and with particular regard to terrain, hazards, group age and experience.
- Large groups may need to be split.
- There should be an assistant leader if group members have limited previous experience of riding in groups or on roads.

### **Additional controls and safety factors**

- Cycling on roads presents additional risks. The danger from traffic is an increasing problem, even on quiet country lanes. Leaders are encouraged to use dedicated cycle ways wherever possible and may consider transporting bikes to cycle way venues, or hiring on site.
- Reflective materials on clothes or cycles greatly increase the visibility other road users have of cyclists, and are strongly recommended.
- Helmets should be worn when cycling on and off road.
- Groups should practice in a safe area to ensure they can control their bikes properly.
- Leaders should ensure group members understand correct behaviour and are aware of dangers en-route.
- Uncontrolled descents and blind corners present particular hazards on even the most minor roads.
- Cyclists should be proficient and have appropriate knowledge of the Highway Code.
- Access may need to be negotiated when cycling off roads. Cyclists have a right of way along public bridleways but not along public paths.
- Cycle in single file on roads.

- Particular care should be taken on unstable or wet surfaces.
  - Leaders should have experience of both cycling and basic cycle maintenance.
  - Cycles should be checked for roadworthiness, particularly brakes, tyres and lights.
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## Fishing

**Sea fishing from a boat is detailed in the section “Boating” above.**

Leaders should exercise supervision appropriate to the expertise and self-reliance of the participants and with regard to prevailing conditions. They should brief group members about potential hazards such as crumbling rocks, tides, shingle, unexpected large waves, slippery rocks, casting dangers and the dangers of being washed into the sea, bearing in mind a safety margin.

The booklet “Group Safety at Water Margins” is recommended reading, and can be found on [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)

### **Activity leader competence: fishing**

All leaders should be competent to assess the risks of the proposed activity, based on the factors listed below. All leaders should have relevant fishing experience and be proficient in first aid, life-saving and rescue as appropriate. Recognised fishing areas should normally be used.

### **Staffing ratio**

- A minimum ratio of 1:10 is recommended inland.
- A minimum ratio of 1:6 is recommended on the coast.
- Many circumstances will require an improved staffing ratio, informed by risk assessment.

### **Additional controls and safety factors**

- Group leaders are encouraged to undertake a training course recognised by the Angling Development Board, such as Level 1: Certificate to Assist in the Coaching of Angling or Level 2: Certificate to Coach Angling.
- Personal clothing and equipment should be appropriate to the environment and weather conditions.
- Wet rocks are slippery and potentially dangerous. Attention should be paid to adequate footwear, for example boots with studded soles. Rubber-soled footwear is potentially dangerous.
- A lifejacket or buoyancy aid should be worn when fishing from rocks.
- A rescue rope or line throwing buoy should be available when fishing from rocks and the leader should be competent to use it.
- Leaders should consult tide tables, if applicable, and be familiar with prevailing conditions.

- Leaders should have local knowledge of the water and access arrangements and be aware of seasonal limitations.
- Elementary weather signs such as wind strength, wind directions, cloud and formations should be monitored as the weather affects tidal conditions.
- Leaders should be proficient in life-saving and resuscitation and aware of the causes and treatment of hypothermia.
- There should be a competent first aider present, who has the ability to instruct others in how to remove fish-hooks from flesh. If this happens an anti-tetanus injection may be needed.
- Wading in fast or unfamiliar waters can be dangerous. Only wade when the bottom can be seen and risks have been carefully assessed.
- The leader should carry a whistle for recalling group members.
- Group leaders should brief participants about appropriate environmental considerations and conservation practices, including a 'catch and return' policy. Anglers should be aware of other people when using hooks and weights.
- Leave details of your programme with an emergency contact who can act if you are overdue.

### Training opportunities and additional information

- Details of the coach licensing scheme of the Angling Development Board which includes; The National Federation of Anglers, The National Federation of Sea Anglers and the Salmon and Trout Association can be found at: [www.fishcoach.org](http://www.fishcoach.org)  
The qualifications can be taken part-time or full-time at schools, colleges, universities or sports clubs.
- The National Federation of Sea Anglers: [www.nfsa.org.uk](http://www.nfsa.org.uk)
- The National Federation of Anglers: [www.nfirect.com](http://www.nfirect.com)

Information about commercial boats can be found on the RYA web site:

[www.rya.org.uk](http://www.rya.org.uk) or the Maritime and Coastguard Agency web site: [www.mcga.gov.uk](http://www.mcga.gov.uk)

## Gorge Walking

Gorge Walking is a combined water and rock activity where hazards associated with a rock environment may at times combine, or alternate with, those of a water environment.. It should be noted, that other names can be used for the activities, such as canyoning, ghyll walks, river walks, adventure swimming, river running, and activities at water margins. Leaders should be aware of the specific content of a programme or proposed activity, and use the table below, together with a specific risk assessment, to guide their planning and level of required leader competence.

Gorge walking - non-technical within the South West	Appropriate life saving and rescue skills <b>and</b> Summer Moorland Leader Award or equivalent
Gorge walking - technical gorges, involving the skills and techniques of a climber, and the use of climbing	Appropriate life saving and rescue skills <b>and</b> Single Pitch Award <b>and</b> Summer Moorland Leader Award or

equipment	equivalent for sites more than 30 minutes from a road or refuge
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Groups undertaking gorge walking and similar activities may use an external provider, ensuring that the provider holds an AALA licence, AND completes the SOE5 or holds an LoTC quality badge.

Where the activity will be lead by a Devon or Torbay leader, the following will apply:

- The leader must be able to demonstrate their competence for the site used based on an assessment of the risks involved at the site. This may be a combination of awards as noted above, or they may hold a “certificate of competence” issued for the site to be used by an appropriate technical advisor. This must be added to Evolve, and to the visit form ALF.
- The technical advisor must be agreed with the LA
- The activity should be run in line with the AALS guidance.
- Clothing and equipment should be carefully considered. A buoyancy aid should be worn if there is a likelihood of being in the water and wet suits may be required.
- Helmets should be worn.
- The group leader needs to be aware of local conditions, including dam releases, river levels and currents.
- Access and exit points need to be considered. Emergency procedures should include alternative exits and escape routes.
- The group leader should carry out a visit to the site, to assess risks and consider the suitability of the site before using it with group members.
- There should be clearly identified cut off points, for temperature, and water levels, beyond which the activity does not take place.
- Leaders should exercise caution before allowing participants to jump into the water. It may be appropriate for the leader to test the jump and the exit point.
- Leaders should be aware of the effects of cold water, and that someone may panic, and ensure appropriate safeguards are in place.
- See also section 4.7 “Water based Activities”

### **Training opportunities and additional information**

There is no specific National Governing Body for this type of activity. Most of these activities will need a combination of skills and awards.

Get more and guidance from:

- The British Mountaineering Council: [www.thebmc.co.uk](http://www.thebmc.co.uk)
- The Adventure Activities Licensing Service: IGN 6.06 “Combined Water Rock Activities, a Safety Checklist” [www.hse.gov.uk/aala/guidance/index.htm](http://www.hse.gov.uk/aala/guidance/index.htm)
- Life saving organisations: [www.lifesavers.org.uk](http://www.lifesavers.org.uk)



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## High Level Ropes courses

### *Introduction*

Ropes courses are an established activity which are by their nature a fun and challenging activity for young people, and which can form a very valuable part of an outdoor education programme. There are an increasing number of these courses in the South West which are being used by a range of Devon County Council and Torbay Council groups.

The European Ropes Course Association (ERCA) have recently developed and published the “ERCA Training Syllabus for all Permanent Ropes Courses 2009”

This document sets out how those involved with ropes courses can comply with EN15567:2007.

Competence of staff (instructors) to run the activities is clearly important to ensuring both the success of the activity and also its safety. Until recently the majority of instructors have been trained in-house, by the installer of the course, or the operator of the course. The view of the Adventure Activities Licensing Service has been that the most appropriate technical advisors for training and assessing the competence of instructors will have appropriate experience of ropes courses and hold one of the following NGB awards – Mountain Instructor Award (MIA), Mountain Instructor Certificate (MIC), a British Mountain Guide (BMG) Carnet or the Cave Instructor Certificate (CIC), or be an ERCA Trainer.

Most groups will use an external provider to supervise / instruct a ropes course session. Form SOE5, or an LoTC Quality badge, should be used to confirm the provider meets the standards of the LA. See section 4.4.

Where the activity is lead by a Devon or Torbay leader, the following will apply:

- The leader must be able to demonstrate their competence for the site used based on an assessment of the risks involved at the site. This will include a “certificate of competence” issued for the site to be used by an appropriate technical advisor. This must be added to Evolve, and to the visit form ALF.
- The technical advisor must be agreed with the LA, following AALS / ERCA guidelines.
- The activity should be run in line with the AALS and / or ERCA guidance. For more information, visit [www.erca.cc](http://www.erca.cc) or [www.aals.org.uk](http://www.aals.org.uk)

### **Use of the Go Ape facility at Haldon Forest, Exeter**

Please refer to detailed guidance on the use of Go Ape by schools and other establishments at [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) . Go to Supplementary Guidance.

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## Horse riding and pony trekking

### Activity leader competence: horse riding and pony trekking

Hazard level	Group instructor or leader
Riding school	Establishment is recognised by the British Horse Society (BHS)
Trekking - countryside or moorland fringe	Established trekking centre with local authority licence and staff with relevant experience
Trekking – more than 30 minutes walk from road or refuge	Establishment is licensed with the Adventure Activity Licensing Service

Visit leaders planning to use riding or trekking centres should ensure that the centre has a current licence issued by the local authority which requires a building inspection, veterinary inspection and evidence of insurance.

### Additional controls and safety factors

#### Riding

- Recognition by the Association of British Riding Schools (ABRS) or BHS provides a guide to the standards to be expected of riding schools when instruction is being considered. In addition, a number of centres have particular experience and qualifications connected to work with special needs groups.
- For all groups, suitable clothing must be worn including well-fitting headgear to current BSI standard and footwear with low, hard heels.
- The numbers of riders per escort must not exceed safe limits; six is reasonable.

#### Pony trekking

- This activity allows access to a great deal of hilly and scenic terrain. It may involve some time in the saddle and preliminary riding instruction is advisable.
- Weather conditions and terrain may make protective clothing necessary.
- Small groups are desirable for pony trekking. They should be accompanied by two adults who are experienced in instructing, leading and assisting treks, have an elementary knowledge of first aid and local knowledge of riding routes.

### Training opportunities and additional information:

Approval by one of the following organisations ensures the establishment has been inspected and found to meet certain minimum standards:

- the Association of British Riding Schools <http://www.abrs-info.org/>
- British Horse Society: [www.bhs.org.uk](http://www.bhs.org.uk)
- Ponies Association (UK): [www.poniesuk.org](http://www.poniesuk.org)
- Riding for the Disabled Association: [www.riding-for-disabled.org.uk](http://www.riding-for-disabled.org.uk)

*The BHS Stage II provides an indication of minimum competence but is not a requirement for an escort.*

## Mountain and moorland activities

(Also see Coastal and countryside activities Section 4.22)

**Activity leader competence: walking** (also see camping)

Hazard level	Group instructor or leader
Coastal and countryside areas	Relevant experience or Coastal and Countryside Course (SWMMLTS) or Level 3 Award in Basic Expedition Leadership (BEL) (Sports Leader UK) or Lowland Leader Award (MTE)
Moorland fringe less than 30 minutes walk from road or refuge	Relevant experience or as above
Moorland in summer conditions more than 30 minutes from road or refuge	Summer Moorland Walking Leader (SWMMLTS) or Walking Group Leader (MTE) or Hill and Moorland Leader (MTE)
Moorland in summer conditions more than 30 minutes from road - including camping on the open moor	Summer Moorland Camping Leader (SWMMLTS) or Walking Group Leader with moorland camping endorsement (MTE) or Hill and Moorland Leader with Expedition Module (MTE)
Moorland in winter conditions	Winter Moorland Walking Leader (SWMMLTS) or Walking Group Leader (MTE) or Hill and Moorland Leader (MTE)
Mountain terrain in summer conditions- including scrambling	Mountain Leader Award - summer
Mountain terrain in winter conditions	Mountain Leader Award - winter
Mountain terrain abroad	Mountain Leader Award or International Mountain Leader Award

• The MTE is introducing a series of new awards, and renaming others. From April 2014, the WGL will be renamed the Hill and Moorland Leader, and there will be a new lowland award, the Lowland Leader Award. Full details of these awards from [www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training) and [www.mountain-training.org](http://www.mountain-training.org) Existing awards remain valid.

Summer moorland conditions are typically fair weather days, but may have cold winds, rain and low temperatures which have not been forecast and can be a hazard, so the leader and the party should be prepared for this. Winter moorland conditions exist when there is snow and or ice under foot or forecast irrespective of the time of the year, and also includes a combination of rain, cold winds and low temperatures.

All moorland leaders must have done a minimum of sixteen hours formal first aid training in the last three years with an HSE approved provider.

### **Recommended staffing ratios**

- One qualified leader to 15 group members is recommended as a minimum.
- It is preferable to have two adults accompanying a group.
- In a mountain environment an improved ratio is required, based on risk assessment.
- Large parties are difficult to manage.
- The minimum recommended group size is four.

### **Additional controls and safety factors**

- The responsibilities and leadership skills needed for a group on the moors or in the mountains call for a broad base of knowledge and experience. This is particularly the case where there are severe weather conditions, navigational difficulties or where an unexpected incident occurs.
- The leader needs to be aware of symptoms of hypothermia and hyperthermia and how they may be prevented or dealt with.
- The leader should be familiar with accident procedures, individual and group equipment needs and the hazards involved in crossing swollen streams or rivers.
- The speed of the group should be governed by the slowest member.
- The minimum equipment the leader will generally need is; waterproofs, map and compass, whistle, torch, survival bag, first aid kit, hat and gloves, spare clothing and emergency rations and a mobile phone. Many of these should also be carried by group members, depending on the group and the route being taken.
- The mountain and moorland environment in winter conditions should not be underestimated. Fitness and stamina is needed as well as sound judgement and navigational ability.
- The leader should get a local weather forecast before departure.
- The leader should leave details of the route the group intends to take at base or with a responsible adult, together with instructions of the action to take if the party is late.
- The leader needs to be aware of access and conservation issues in the area they are visiting.

## **Ten Tors**

The required minimum level of approval for staff managing Ten Tors training is the Summer Moorland Camping Leader Award. However, staff leading Ten Tors groups in wintry conditions will need:

- Summer Moorland Camping Leader Award *plus* the Winter Moorland Walking Leader Award *or*
- Hill and Moorland Award plus expedition module, *or*
- Walking Group Leader Award (including remote camping) *or*
- Summer Mountain Leader Award.

Team Managers should refer to “Ten Tors: Management and Supervision”, October 2013, available on the Babcock LDP and Evolve websites.

Particular attention should be paid to how prepared groups are which will be supervised remotely, even in reasonable weather conditions (see Section 3.17: Remote supervision).

Managers must attend the Ten Tors briefing as required by the organisers. All members of staff should be aware of current good practice in terms of leadership, hypothermia and hyperthermia, water hazards, access, clothing and equipment. Managers should be aware of information about Ten Tors requirements for managers, available at <http://events.exeter.ac.uk/tentors/>

### **Training opportunities and additional information**

- Mountain Training England (MTE): [www.mountain-training.org](http://www.mountain-training.org)
- The MTE has produced a booklet providing best practice in the remote supervision of groups: [www.mountain-training.org](http://www.mountain-training.org)
- *Hillwalking: The Official Handbook of the Mountain Leader and Walking Group Leader Schemes* from MLTUK.
- The South West Mountain and Moorland Leader Training Scheme covers the moorland areas of the South West and the Brecon Beacons, excluding exposed ridges, gullies and steep ground. The South West Mountain and Moorland Leader Training Scheme Syllabus is at: [www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training)
- Devon Outdoor Learning provides training and assessment programmes for the South West Scheme and Walking Group Leaders' Award. (SWMMLTS) [www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training)
- Sports Leaders UK administers the Level 3 Award in Basic Expedition Leadership (BEL) [www.sportsleaders.org](http://www.sportsleaders.org)
- Dartmoor National Park: [www.dartmoor-npa.gov.uk/](http://www.dartmoor-npa.gov.uk/)
- Exmoor National Park: [www.exmoor-nationalpark.gov.uk](http://www.exmoor-nationalpark.gov.uk)
- Met Office: [www.metoffice.gov.uk](http://www.metoffice.gov.uk)
- Met Office Weathercall Devon and Cornwall: 09014 722054

## **Motor Sports**

Motor sports should be only offered to groups at established venues, where the operator can show compliance with HSE requirements, and carries full public liability insurance. Form SOE5 should always be used to ensure the provider meets the standards required by the LA.

Providers may ask visit leaders or participants to sign an indemnity form. These forms are NOT acceptable. Any such waiver or disclaimer must be struck off the forms. Further advice about insurance can be sought from the DCC Insurance section: David Doble, County Insurance Officer on 01392 382292 or Torbay Insurance on 01803 207174.

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## **Orienteering**

### **Introduction**

Orienteering is a sport which blends navigational and physical skills. It is not especially hazardous, but it is an all year round activity and accidents may occur in places where medical attention is not immediately available. In the nature of orienteering young people will typically be supervised on a remote basis and this should be considered in the risk assessment. Group leaders taking parties to organised events should have had first hand

experience of the sport.

### **Activity leader competence: orienteering**

Leaders should have relevant experience, and are encouraged to hold a British Orienteering Federation award.

### **Training and coaching opportunities and additional information**

- British Orienteering Federation: [www.britishorienteering.org.uk](http://www.britishorienteering.org.uk)
- Find details of local club events at: [www.devonorienteering.co.uk/](http://www.devonorienteering.co.uk/)
- Find details of local permanent orienteering courses at: [www.orienteeringindevon.org.uk](http://www.orienteeringindevon.org.uk)
- Find coaching details at: [www.britishorienteering.org.uk/developing/award-scheme.php](http://www.britishorienteering.org.uk/developing/award-scheme.php)

### **Recommended staffing ratios**

- An organised British Orienteering event, where additional supervision is on hand, will need different support to that which is needed to manage a training session with no outside assistance.
- For training and teaching sessions a minimum ratio of 1:15 is recommended. For most groups this ratio will need to be improved depending on the complexity of the terrain, the experience and age of the group and the extent of boundary collecting features.
- At an organised event a minimum ratio of 1:15 is recommended for participating groups - allowing adequate preparation for competitors the group leader is responsible for.
- Experienced parents and other adult helpers may help with supervision.

### **Additional controls and safety factors**

- Full leg and arm cover should be worn.
- Clothing should give adequate protection against cold, wind and rain, especially in exposed locations.
- A whistle should be carried and individuals instructed in its use and misuse.
- Orienteering skills should be taught in clear and easy stages, with adequate opportunity for individuals to get to know the map. Courses should encourage a sense of success not failure and should involve safety strategies for novices to limit the effects of navigational errors.
- Out of bounds areas should be clearly defined and reference made to any particular local hazards.
- Leaders should stress the importance of reporting to the finish and of handing in control cards for all competitors, whether they complete a course or retire.
- A time limit may need to be set which individuals must return to base by, allowing a margin of time if an initial search is needed.
- Instructions should be given to novices about what to do if they become lost.
- For activities, perhaps using permanent courses, for novices or young participants it is appropriate for young people to work in pairs or threes.
- Competitive orienteering generally involves individuals travelling alone through the woodland, countryside or, less commonly, urban event area. The visit leader should be aware of the slight risk of interference from the public.

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## **Paddlesports, including Canoeing and kayaking, Stand up Paddleboards**

### **Activity leader competence: canoeing and kayaking**

The BCU has recently revised the Coaching Scheme. New awards have different limitations and terms of reference. See [www.bcu.org.uk](http://www.bcu.org.uk) for latest details.

BCU / UKCC Awards are specific to type of water, either inland, sea or surf and to type of boat -either kayak or canoe. Leaders are expected to operate within the terms of reference of their awards.

Groups often use an established external provider for this activity. Form SOE5 OR the LoTC Badge OR BCU Approved Centre status should be used to ensure the provider meets the standards required by the LA.

Where a leader from Devon or Torbay leads the activity, the following will apply:

- The leader must hold an appropriate BCU or UKCC award, and work within the terms of reference of that award.
- The leader must have up to date first aid, and be currently registered with the BCU
- The activity must be notified via Evolve, with the leaders current award added to the system.

Ratios:

- The BCU ratios represent normal practice for teaching purposes. Circumstances may dictate that lower limits should apply.
- An appropriate technical adviser may allow these ratios to be exceeded.
- The use of suitably qualified assistants can permit larger groups, although over large groups should be avoided.
- Remote locations will need more stringent procedures.

### **Additional controls and safety factors**

- All participants should wear a personal flotation device (PFD) suited to their ability and the location. The PFD should be properly fitting, and tested to ensure it remains fit for purpose
- Helmets may be worn according to BCU guidelines and a local specific risk assessment.

### **Training opportunities and additional information**

- The National Governing Body for all paddlesport activity is the British Canoe Union: [www.bcu.org.uk](http://www.bcu.org.uk)
- Haven Banks Outdoor Education Centre is a recognised Devon County Council BCU centre in Exeter and provides a range of training courses: [www.haven-banks.co.uk](http://www.haven-banks.co.uk) or phone: 01392 434668

### **Stand Up Paddleboards**

This is a relatively new activity, involving the use of large, stable boards, similar to windsurf or surf boards, propelled by one long paddle.

There is a national organisation providing instructor courses – the British Stand Up paddleboard Association, at [www.bsupa.org.uk](http://www.bsupa.org.uk)

This activity falls within the scope of the Adventure Activity Regulations. Groups should use form SOE5, or the LoTC badge, to ensure the provider meets the requirements of the LA.

### **Activity Leader competence**

Where the activity is lead by Devon or Torbay staff, the following will apply:

- Leaders should hold a BSUPA award OR another appropriate watersports instructor award, (for example a BCU or RYA instructor award) plus craft specific training
- Risk assessment must take into account the venue, particularly with regard to emergency procedures and rescue

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## **Paintballing**

A number of schools, colleges and youth groups take part in paintballing, particularly as a recreational activity. The following guidance is offered to head teachers, managers and prospective visit leaders.

- Be clear about your objectives for each particular group which may participate. There is limited merit in helping to ensure an activity is safe if no clear and appropriate rationale for the programme has previously been established.
- Use providers who can demonstrate they are accredited by a recognised national organisation which has expertise in this area and sets minimum standards to which its members conform. Two such organisations are:

The UKPBA (UK Paintball Association) [www.ukpba.org](http://www.ukpba.org) has an accreditation scheme for sites, and

The UKPSF (UK Paintball Sports Federation) [www.ukpsf.com](http://www.ukpsf.com) has an accreditation scheme that includes site inspection.

- The Provider must ALWAYS complete the form SOE5 and return it to the visit leader before a booking is made. This will check relevant safety policies and insurance levels. A copy is available from [www.babcock-education.co.uk/ldp/outdoorededucation](http://www.babcock-education.co.uk/ldp/outdoorededucation)
- The minimum age accepted by different providers varies considerably. It is clearly important to comply with the age restrictions, and consider offering alternative activities to younger pupils.
- Participants should receive a clear briefing from the provider regarding safety procedures.



- Protective clothing and equipment should be provided, to protect areas of the head, neck and body including eyes, ears, face, throat and hands. Chest protection should be available to and worn by girls.
- The group leader should be confident that participants will abide by the rules and work within the safety briefing prior to starting any game.
- Parents and participants should be aware that bruising can result from pellets fired during a game. This should be made known on the information sheet which is distributed to parents and prospective participants. Signed parental consent should always be obtained for Paintball activities, including the acknowledgement of the level of risk from bruising etc.
- Providers may ask visit leaders or participants to sign an indemnity form. These forms are NOT acceptable. Any such waiver or disclaimer must be struck off the forms. Further advice about insurance can be sought from the DCC Insurance section: David Doble, County Insurance Officer on 01392 382292 or Torbay Insurance on 01803 207174.

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## **Rafting, including improvised raft building**

Raft building can be a worthwhile, realistic team exercise for groups of any age. Rafts can be made from barrels and planks, windsurf boards, open canoes strapped together, and a variety of other materials. There is no National Governing Body for this activity.

### **Activity leader competence: improvised raft building**

Raft building activities are often run at an established water sports centre. The form SOE5 OR the LoTC Badge should be used to ensure the provider meets the requirements of the LA. The activity should be notified as an Adventure activity via Evolve.

Where a leader from Devon or Torbay leads the activity, the following will apply:

- The leader must have appropriate life saving skills
- The leader should hold an appropriate water sports instructor award – such as BCU, RYA, BSA instructor, and have specific training and experience of raft building at that venue.

OR

- Hold a “certificate of competence” from an appropriate technical advisor.
- The technical advisor must be agreed with the LA

AND

- The activity should be notified via Evolve, with the leader’s award added to the system.

### **Additional controls and safety factors**

- PFDs, life jackets or buoyancy aids, should be worn by participants on or near the water.
- Helmets should be considered during the building process and when launching.

- Appropriate clothing and footwear should be worn. Hand protection might be considered, for example to avoid splinters, or when pulling on ropes during building.
- Instructors should carry, or have immediate access to, a knife.
- A throw line or other reaching device should be to hand.
- A first aid kit should be available.

Consideration should be given to wind and weather, particularly off shore winds and low water temperatures.

### **Safety boats**

Safety cover should be provided on the basis of a local, specific risk assessment. The principle should be that all the participants can be recovered within a maximum of three minutes, and returned to the shore before the effects of cold become significant. Powered safety boats should be helmed by a qualified driver, who has a minimum of RYA Level 2 with specific training on raft rescue. It may be appropriate in some circumstances, for example on very sheltered water, for safety cover to be provided from a canoe, windsurf board, non-powered boat, or even by the instructor wading. The instructor and safety crew should be practiced in recovering all the rafters from a collapsed raft.

Further information and guidance is available from [www.aals.org.uk](http://www.aals.org.uk)

## **Sailing, windsurfing, kite surfing**

Almost all sailing activity takes place at an established sailing centre or club. The form SOE5, or the LoTC Badge, or RYA Recognition should be used to ensure the provider is working to the standards expected by the LA.

Where sailing activities are lead by Devon or Torbay staff, the following will apply:

- The leader must hold an appropriate RYA award, and work within the terms of reference of that award.
- The leader should hold an appropriate first aid award
- The session should be conducted in line with RYA guidance for instructor to student ratios, safety boats, etc
- The leader must ensure the visit is notified via Evolve, and the leader's awards added to the system.

### **Additional controls and safety factors for dinghy sailing:**

- At all levels a safety boat should be on hand, staffed by qualified crew. The minimum qualification is RYA Level 2 National Powerboat Certificate, preferably RYA Safety Boat Award. In either case, the safety boat crew must be experienced and competent to rescue the type of dinghy being used.
- Emergency arrangements should allow for the recovery and immediate start of resuscitation within three minutes of immersion.
- Leaders are expected to operate within the terms of reference of their RYA Award at all times, although not necessarily under the supervision of an RYA recognised teaching establishment..

### **Additional controls and safety factors for yachts**

- Day Skipper and Yachtmaster Awards are proficiency awards and do not necessarily encompass leadership skills. Visit leaders will need to satisfy themselves that the activity will be led by staff who are sufficiently experienced in managing young people or adults.
- Accident-free sailing depends, in part, on having a boat that is sound, well-equipped and suitable for the activity it is being used for.
- The crew should have enough experience and knowledge to operate in the prevailing conditions.
- Yachts have to comply with Maritime and Coastguard Agency regulations, according to their size and the area of operation. All vessels need either to be operating through an RYA registered school, or hold a Small Commercial Vessel Certificate from the MCA [www.mcga.gov.uk](http://www.mcga.gov.uk)

### **Additional controls and safety factors for windsurfing**

- At all levels a safety boat should be on hand, staffed by qualified crew. The minimum qualification is the RYA Level 2 National Powerboat Certificate, preferably the RYA Safety Boat Award. The safety boat crew must be experienced and competent to rescue windsurfers. On sheltered water sites it may be acceptable for the leader to provide rescue cover from a canoe, or their own board. The leader should exercise careful judgement in deciding what rescue cover to provide, taking into account the wind and weather, location and the ability of the group. Emergency arrangements should allow for the recovery and immediate start of resuscitation within three minutes of immersion.
- The leader must show knowledge and understanding of the RYA method of teaching.
- Recall signals must be clear and known by all.
- The sailing area must be clearly defined.
- The leader must know the harbour, estuary or river throughout all stages of the tide.

## **Power boat and safety boat handling**

Power boats can range from small safety craft operated on inland waters, to large off shore cruising boats. The competence of the skipper / driver, and the emergency equipment carried will depend on the type of vessel and its operating area.

The RYA are the national governing body for this activity with small craft and yachts, and the LA expects all operators to comply with its guidance. Ski boats are subject to different NGB Guidance, see section on Boating - water skiing.

Boat operating commercially will need to comply with Maritime and Coastguard Agency (MCA) Regulations. Groups using commercial boat operators, for fishing, cruising, pleasure trips and study trips should ensure that the boat is Registered with the MCA and carries appropriate public liability insurance. Form SOE5 can be used to check this.

### **Activity leader competence**

The minimum award to operate a safety boat is the RYA Level 2 certificate. In most circumstances, a higher award will be appropriate.

#### **Additional controls and safety factors**

- Leaders are expected to operate within the terms of reference of their RYA Award at all times.
- The boat being used must be suitable for purpose and appropriately equipped, including emergency kit, kill cord, first aid and a communication system.
- The number of boats or boards to a safety boat is normally a maximum of 6:1.

#### **Training opportunities and additional information:**

- The National Governing Body for these activities is the RYA: [www.rya.org.uk](http://www.rya.org.uk)
- Leader should be aware of, and comply with, the requirements of the Maritime and Coastguard Agency (MCA) for Small Commercial Vessels. Details are available from the RYA: [www.rya.org.uk](http://www.rya.org.uk) or the MCA: [www.mcga.gov.uk](http://www.mcga.gov.uk)
- The MCA regulations come into force for any commercial activity on the sea, even when using a privately owned boat. Water skiing, banana rides, fishing, and recreational excursions may all fall within the remit of the MCA regulations.

#### **Kite surfing**

Kite surfing is a relatively new activity that is infrequently offered to young people, due to the likelihood of injury. Groups are encouraged to use an established kite surfing provider that is approved by the British Kite surfing Association.

Where a Devon or Torbay leader takes charge of the activity, the following will apply:

- The leader must hold an appropriate kite surfing instructor award
- Venues chosen must be suitable for the young people
- Equipment used must be suitable for young people
- Parents / guardians must be aware of the risk of injury
- The activity must be notified via Evolve, with the leader's award added to the system.

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## **Shooting and Archery**

Groups are recommended to use established external providers for this activity. Form SOE5 should be used to ensure the provider complies with the requirements of the LA.

#### **Additional considerations**

- These activities require an appropriate firing range, properly protecting both users and passers by.
- For archery, the leader must have training linked to the national governing body, the Grand National Archers Society (GNAS); and the activity must be run in line with GNAS guidance.
- For shooting, the National Small Bore Rifle Association provides guidance for leaders and firing ranges.
- Participants must be provided with protective equipment where appropriate, including wrist guards, ear defenders etc.

Further information can be obtained from [www.archerygb.org](http://www.archerygb.org), the trading name of GNAS. The National Smallbore Rifle Association is at [www.nsra.co.uk/](http://www.nsra.co.uk/)

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## Snowsports, including skiing, snowboarding and tobogganing

### Introduction

Visit leaders should be aware of the educational opportunities presented by a snow sport course in this country or abroad and how they may be realised. The residential element of a course creates significant additional responsibilities which need preparation, planning and adequate supervision.

### Activity leader competence: skiing and snowboarding

The Visit leader should hold the Snowsport Course Organiser Award. This must be added to Evolve.

### Supervision of snow sports

Ski teaching or instruction should be lead by instructors who hold a local ski school award OR an appropriate award issued by the British Association of Ski Instructors (BASI), SnowSport England / Scotland, British Mountain Guide Association or other national awarding body.

- The National Governing Body is Snowsport England. Get details of courses at: [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk)
- BASI is at [www.basi.org.uk/](http://www.basi.org.uk/)
- Visit leaders should have access to a copy of the handbook *Going Skiing* from Snowsport England.
- Find information on ski injuries and research at: [www.ski-injury.com](http://www.ski-injury.com)

In order to ensure proper supervision of the young people, and to maximise the skiing time, visit leaders should normally arrange for a **minimum** of four hours ski school tuition (two sessions) per day.

Members of staff who hold the Alpine Ski Course Leader award or equivalent or higher award, may directly supervise their own groups. They must be able to exercise adequate supervision of their group and have knowledge of the skiing area being used. Ski tuition is outside the remit of the ASCL.

A member of staff who holds the ASCL or higher award may deploy other competent staff to supervise groups, usually for a short time between or after ski school, within the following limitations:

Each member of staff who supervises a group must:

- Have previous experience of school skiing
- Be fit and competent to supervise
- Be in sight of their group at all times, and under the indirect supervision of the qualified leader
- Use slopes and lifts that the group and supervising adults have used with ski school and that they are comfortable with, generally staying on the easier slopes.

- Have clearly defined limits, including slopes and lifts, time and meeting points, emergency arrangements, contact with the qualified leader.
- All follow the International code of conduct.

### **Recommended staffing ratios**

- A ratio of one responsible adult or instructor to ten party members is recommended for organising the course. However, some ski schools may reasonably work to a higher ratio in lessons such as a minimum of 1:15.

### **Additional controls and safety factors**

- Helmets should be worn by all skiers and snowboarders at all times, and comply with BS/EN 1077/1996 and be correctly fitting and fastened.
- Visit leaders must ensure that all skiers in their group are aware that to reduce the likelihood of injury when skiing, snowboarding or tobogganing they should ski under control and comply with the International Code of Conduct. Skiing recklessly, or at high speed, can lead to serious injury even if a helmet is used.
- Young people should not be allowed to ski alone or outside marked skiing areas and trails.
- Supervised skiing practice and other snow activities should be carefully monitored.
- Clear instructions should be given to party members about runs, tows and chairlifts and their use, check-in and return times and rendezvous points. Reference should be made to local and general safety precautions and accident procedures. A piste map for party members will help.
- Snow sports are physically demanding and need endurance, strength and mobility. Preparation is essential and a programme of pre-ski exercises and fitness training should be undertaken before any trip.
- Artificial ski slope practice is invaluable as a part of this preparation, and planned visits under the direction of a qualified instructor are recommended.
- The visit leader should be confident of the instruction given to individuals under tuition. Discussion with the travel company representative or their equivalent may overcome unexpected difficulties.
- Instruction should be given in the safe carrying and handling of equipment.
- The group should be properly clothed and equipped for snow, wind and low temperatures.
- Equipment should be of an acceptable standard and appropriate to each individual. Skis must be fitted with adjustable release bindings and ski brakes. The basic principle of the ski binding mechanism should be explained to party members when fitting, enabling them to identify and report faults. Bindings must be adjusted to suit the weight and physical condition of each skier and should only be altered by appropriately skilled technicians. Party members should check with instructors or staff if there are problems with equipment.
- The use of knee protection, wrist guards, and helmets is recommended for snow boarding.

A parents' evening should be held during the planning period. A brochure produced by the visit leader for a specific course is recommended to prepare students and inform parents. Important issues are:

- clothing

- agreed standards of behaviour and policies regarding smoking, alcohol, punctuality, care of rooms, responsibilities to others in the resort, the hotel and on the slopes.

### **Non-skiing activities**

Appropriate safety considerations need to be given to non-skiing activities in the event of no snow or for recreation. Where activities are provided by a third party, for example, tobogganing, the visit leader should check the safe operation of the activity beforehand. This may include watching the activity taking place, or taking references from other schools that have used the operator. If activities such as tobogganing are provided directly by the school staff, then safe operational procedures should be in place, based on an assessment of the risks involved.

Consideration should be given to:

- choosing a slope with a safe run off at the bottom
- starting young people in small groups from low down the slope initially
- arranging a safe return walking area to the side of the run
- use of gloves, helmets, and other protective equipment as appropriate
- discouraging racing or reckless riding.

Visit leaders planning cross-country skiing or ski mountaineering should ensure plans are notified at an early stage via Evolve.

### **Dry Slope Skiing**

The use of artificial slopes to train for ski courses is encouraged. A minimum staff to student ratio of 1:12 is recommended. Local guidelines and regulations for the use of the slope should be observed. Gloves or mitts should be worn. Loose clothing which may get caught in the tow should not be worn. Where appropriate, the safety procedures stated for skiing should be adhered to.

To instruct skiing on an artificial slope, leaders must hold a minimum of an Artificial Ski Slope Instructor's Certificate or Club Instructor's Award.

Most slopes provide instruction to groups. The form SOE5 can be used to ensure the provider meets the requirements of the LA.

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## **Snorkelling and sub-aqua**

### **Snorkelling**

Snorkelling is often the gateway to the more complex sub-aqua diving activities for young people. However, snorkelling is a challenging activity in its own right.

- The activity is best taught in either a swimming pool or shallow, sheltered open water by teachers who have gained the appropriate award of the British Sub Aqua Club (BSAC) or the Professional Association of Dive Instructors (PADI). In open water leaders must also hold the RLSS Bronze Award or its equivalent.
- Students must be made aware of the need to clear their ears and to avoid exhaustion and hyper ventilation, and the correct use of snorkel equipment.
- Open water snorkelling should take place under the organisation of qualified leaders and instructors with due regard to experience, conditions and safety cover.

## Sub-aqua diving

Diving is a specialised activity which, in the UK, relies on thorough training and a high degree of specialised equipment.

The British Sub-Aqua Club (BSAC) provides guidance on the minimum age at which young people may dive and train, and within what limits, including Junior Diving Members aged between 12 and 14. The Professional Association of Dive Instructors (PADI) sets the lower age limit at 10 years old, and offers a 'Bubblemaker' activity for younger divers.

### Additional controls and safety factors

- All diving activities should take place with a recognised training facility, either a BSAC branch or school, or a PADI dive school or centre.
- Initial training should be carried out in a swimming pool using a BSAC or PADI training programme with appropriately qualified staff, such as a BSAC Instructor or Dive Leader.
- Open water diving should be carried out under the overall organisation and control of an instructor with a minimum of BSAC Club Instructor qualification or PADI equivalent.
- The ratio of instructor to student in the water should be according to the relevant BSAC or PADI guidelines.
- Open water diving needs to be carried out with due regard to careful progression of the pupil's experience and the prevailing conditions and depth.

### Training opportunities and additional information

- The National Governing Body for this activity is the British Sub Aqua Club (BSAC) [www.bsac.com](http://www.bsac.com)
  - BSAC also qualifies leaders as snorkelling instructors and has a dedicated snorkelling section: [www.bsacsnorkelling.co.uk](http://www.bsacsnorkelling.co.uk)
  - The Professional Association of Diving Instructors (PADI) is a worldwide organisation that offers training courses and supervised diving to an acceptable standard: [www.padi.com](http://www.padi.com)
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## Surfing

### Activity leader competence: surfing - using Malibu boards or body boards

Most surfing activities take place at established surf schools. Groups should ensure they choose a BSA / Surfing GB approved school. Form SOE5 should also be used.

Where a Devon or Torbay leader takes charge of the activity, the following will apply:

- Body boards – leader must hold **MINIMUM** RLSS Bronze Medallion, and the activity **MUST** take place on a lifeguarded beach. \*\*
- Malibu boards – the leader must normally hold the BSA / Surfing GB Level 1 coach award, AND work on a life guarded beach.



\*\*For young people in residential care, however, groups of one to three people taking part in occasional family type body board surfing activities may be supervised by staff **without** this award provided the following conditions are met:

- The manager of the establishment should ensure a risk assessment is completed for each proposed surfing trip.
- Surfing must only take place on beaches where a lifeguard is present and on duty, with surfing taking place in the area designated by the two red and yellow flags.
- The accompanying member of staff should be a competent swimmer and have experience of body board surfing.

The member of staff will retain a supervisory role from the water's edge, or accompany the group in the water, taking into account the risk assessment. The whereabouts of the nearest telephone contact point should be known in case of emergency.

### **Recommended staffing ratios**

- The British Surfing Association (BSA) and Surfing GB recommend a ratio of no more than 10 surfers to one Level 1 instructor. For body boards, where the leader is qualified at RLSS Bronze Medallion only, the ratio is 1:8. The use of a competent assistant may increase this number to 1:10 at the discretion of the leader.

### **Additional controls and safety factors**

- Surfers should be made aware of, and follow, the Surfing GB Code of Conduct.
- The leader must be fully aware of the prevailing local conditions: surf, tide, wind and weather and be fully confident of rescuing any member of the group.
- The leader must consult the lifeguard patrol wherever possible and follow their advice.
- The leader must be in control of the whole group, including those out of the water.
- All surfboards should be in good condition and have ankle straps; body boards should have wrist straps. It is recommended that soft skinned Malibu boards are used by beginners.
- Members of the group should wear wetsuits and swimming costumes or other clothing appropriate to the water temperature and weather conditions.
- An area of operation must be designated, and the leader must know the commonly used signals of distress and recall.
- All members of the group must be competent swimmers in the light of the conditions.
- When beginners are being introduced to the activity, consideration must be given to pairing a participant with a shore based observer.

### **Training opportunities and additional information**

- The National Governing Body for surfing is Surfing GB, on [www.surfinggb.com](http://www.surfinggb.com) replacing the British Surf Association.
- The Surfing GB runs an accreditation system for surf schools, which provides the basis for staff wishing to instruct or teach surfing.
- Holders of the BSA Awards will need to ensure they transfer their awards to the new scheme.
- Surf coaches also need to hold a life saving award acceptable to the BSA.

## Swimming other than in public pools

Outdoor swimming is an enjoyable but potentially hazardous activity. It may involve swimming in the sea, a lake or river. The use of recognised bathing areas will reduce potential hazards. See also the section on Beach and Coastal Safety. The details below apply to activities in the UK and abroad.

### Leadership qualifications

- **Life guard patrolled beaches.** The visit or group leader from the school must hold a minimum of the RLSS Bronze Medallion or equivalent. The group must follow the advice of the lifeguards and stay within the supervised area. Note that the role of the life guard complements, rather than replaces, the role of this qualified member of staff, unless specific agreement has been reached with the lifeguard that they are able to supervise your group.
- **Beaches with no lifeguard present.** The leader must hold a minimum of the RLSS Bronze medallion award or equivalent. Only known safe swimming beaches should be used. Leaders must take into account the limitations of their own experience and competence. They must ensure that the prevailing conditions are suitable both for themselves to act as the life guard, and for the ability of the group.
- **Lakes, rivers and canals.** Swimming in these environments presents particular risks in terms of depth, temperature and access which must be carefully assessed beforehand. Gain local information about any dangers. The leader must hold a minimum of the RLSS Bronze Medallion or equivalent and be capable of a rescue from the deepest part of the swimming area.

In all cases the leader must be aware of the limitations of their own experience and competence. Where splash about swimming takes place, for example at the end of a canoeing or sailing session, the lifesaving and supervision should be provided by the canoeing or sailing instructors, provided that the swimmers wear a buoyancy aid.

### Recommended minimum staffing ratios - 1:10

A competent assistant is required for all but the most manageable groups, particularly where there is no lifeguard present. A competent member of staff must be land-based observing the group at all times. Leaders should consider the merits of a buddy system, limiting the number of swimmers in the water at any one time, and keeping swimmers within their depth.

### Safety factors

Leaders should be aware of the effects of sudden immersion in cold water. The leader should make an assessment of the risks posed by the prevailing conditions: for example, surf and tide, the weather, currents, wind, undertows, cold, weeds, polluted water and the stability of the sea or river bed. Leaders should also get local information where possible.

Lakes, rivers and canals will generally be colder than the sea. An area of operation should be designated, and the leader should know the commonly used signals of distress and recall. A signal system should be adopted.

For example:

- to gain attention is one blast of the whistle
- to clear the swimming area is two blasts of the whistle.

The leader should have appropriate rescue equipment to hand such as a throw line, a buoyant rescue device or something for a struggling swimmer to hold onto.

The leader should be in control of the whole group, including those out of the water. All members of the group should be competent swimmers in the light of the conditions and the degree of supervision; it is worth noting that young people who drown are often strong swimmers. Do not allow anyone to swim within 30 minutes of eating. In a private or hotel pool, where there is no lifeguard on duty a supervisor must hold the RLSS Bronze Medallion or equivalent.

For supervision of swimming in private pools, the following applies:

Maximum water depth less than 1.3 metres, supervision by adult with up to date resuscitation award, which may be part of a first aid certificate.

Water depth greater than 1.3 metres, supervision by adult holding a life saving award such as the RLSS Bronze.

In all cases, the leaders should be fully aware of the emergency procedures for the site.

For swimming activities in pools and open water also see *Safe Practice in Swimming Activities* from Babcock LDP, <http://www.babcock-education.co.uk/ldp/pe> or email [steve.kibble@babcock-international.com](mailto:steve.kibble@babcock-international.com)

### **Open water swimming: children's homes**

Recommended practice is as outlined above and requires that staff hold the RLSS Bronze Medallion or equivalent qualification. For young people in residential care, groups of one to three people taking part in occasional family-type swimming activities may be supervised by staff without this award provided that:

- the manager of the establishment ensures a risk assessment is completed for each proposed swimming location
- preference is given to the use of beaches where a lifeguard is present and on duty, with swimming taking place in the area designated by the two red and yellow flags
- where there is no lifeguard on duty the beach is considered to be a safe beach by the local district council
- similar checks are made when using other sites regularly used by the public for open water swimming
- the member of staff designates an area for swimming and retains a supervisory role from the water's edge, taking into account the risk assessment. The whereabouts of the nearest telephone contact point should be known in case of emergency.

Find training opportunities and more information at: Royal Life Saving Society  
<http://rlssonline.com>

*Group Safety at Water Margins* can be found at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)

## 4.6 Duke of Edinburgh's Award (DofE)

Devon County Council is the operating authority for the Duke of Edinburgh's Award for the maintained sector in Devon. DofE notifications must be made in accordance with the table below. Academies and other establishments who have bought back into Devon LDP **and** Devon DofE should also follow this guidance, including the notification procedure.

Schools and Academies who have their own DofE licence (DLC), but who subscribe to Devon / Babcock LDP Guidance, should also use Evolve as set out in the following table. This will ensure the activity complies with guidance, and the Evolve data will provide the required records for the DofE audits.

These guidelines have been drawn up for anyone managing potentially hazardous expeditions or explorations, practices or training under Award scheme arrangements.

### Expedition Notification via Evolve - Summary of requirements

Venue	Nature of venture	Minimum Trainer or Supervisor Qualifications	Notification and Evolve "Visit Type"	Notice period	Risk Assessment (Specific)
<b>Normal Country &amp; Coast</b>	Accompanied day walks	Coastal and Countryside Leader or Level 3 Award in Basic Expedition Leadership (BELA) or Lowland Leader Award (MTE)	Evolve "None of Above" or local arrangement	By local arrangement	Carried out by DofE Group Leader and attached to Evolve Visit Form
<b>Normal Country &amp; Coast</b>	Accompanied overnight camps **	Coastal and Countryside Leader or Level 3 Award in Basic Expedition Leadership (BELA) or Lowland Leader Award (MTE) **	Evolve "None of Above" or local arrangement	By local arrangement	Carried out by DofE Group Leader and attached to Evolve Visit Form
<b>Normal Country &amp; Coast</b>	Unaccompanied practice and qualifying expeditions **	Coastal and Countryside Leadership or Level 3 Award in Basic Expedition Leadership (BELA) or Lowland Leader Award (MTE) with expedition module **	Evolve "adventure – establishment staff" AND D of E primary purpose	7 days	Carried out by DofE Group Leader and attached to Evolve Visit Form
<b>Normal Country &amp; Coast</b>	Non-foot ventures	As listed in Outdoor Education, Visits and Off-Site Activities	Evolve "adventure – establishment staff" AND D of E primary purpose	7 days	Carried out by DofE Group Leader and attached to Evolve Visit Form
<b>Wild Country</b>	Accompanied day walks	Summer Moorland Walking Leader (If outside the South-West: Walking Group Leader / Hill and Moorland Leader	Evolve "adventure – establishment staff" Green Form to Wild Country Network if more	2 weeks 4 weeks if more than 35 participants	Carried out by DofE Group Leader and attached to Evolve Visit Form

		Award or Summer Mountain Leader dependant on terrain)	than 35 participants		
<b>Wild Country</b>	Accompanied overnight camps	Summer Moorland Camping Leader (Gold Award Trainers, Supervisors should also hold the Winter Moorland Walking Leader Award) (If outside the South-West: Walking Group Leader Award/ Hill and Moorland Leader or Summer Mountain Leader dependant on terrain) **	Evolve “adventure – establishment staff” Green Form to Wild Country Network if more than 35 participants	2 weeks 4 weeks if more than 35 participants	Carried out by DofE Group Leader and attached to Evolve Visit Form

<b>Wild Country</b>	Unaccompanied practice and qualifying expeditions	Summer Moorland Camping Leader (Gold Award Trainers, Supervisors should also hold the Winter Moorland Walking Leader Award) (If outside the South-West: WGL/ Hill and Moorland Leader Award or Summer ML dependant on terrain)	Evolve “adventure – establishment staff” AND D of E primary purpose Green form to Wild Country Network and attached to Evolve Form	6 weeks if assessor is required 4 weeks for practice journeys or if own assessor	Carried out by DofE Group Leader and attached to Evolve Visit Form
<b>Wild Country</b>	Non-foot ventures	As listed in Outdoor Education, Visits and Off-Site Activities	Evolve “adventure – establishment staff” AND D of E primary purpose Green form to Wild Country Network and attached to Evolve Form	6 weeks if assessor is required 4 weeks for practice journeys or if own assessor	Carried out by DofE Group Leader and attached to Evolve Visit Form
<b>Overseas</b>	Expedition	Dependent on programme Minimum of Mountain Leader if in mountainous areas.	Evolve “adventure – establishment staff” AND D of E primary purpose Blue form attached to Evolve Form	At the planning stage. Minimum of 12 weeks prior to venture.	Carried out by DofE Group Leader and attached to Evolve Visit Form

The MTE is introducing a series of new awards, and renaming others. From April 2014, the WGL will be renamed the Hill and Moorland Leader, and there will be a new lowland award, the Lowland Leader Award. Full details of these awards from [www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training) and [www.mountain-training.org](http://www.mountain-training.org)

All existing awards remain valid.

\*\* Camping endorsements should be held by all leaders EXCEPT where the leader is in “normal” country, and will be supervising the use of stoves themselves. Whenever the young people are using stoves, the leader MUST hold a camping endorsement. Camping endorsements are offered by the MTE as part of WGL or the new Hill and Moorland Leader Award, or by the SWMMLTS scheme. See pages 64 to 66 of this Guidance.

Wild country is defined as areas of land suitable for Gold expeditions as listed on the DofE web site. All other areas of land are “normal” country. Some areas on the fringes of Dartmoor may be “normal” country, even though they are within the National Park. A map showing these areas is available from the Devon DofE office and via <http://www.dofe.org/en/content/cms/leaders/expedition-areas/dartmoor/>

Note: Local Unit is school, youth service unit, voluntary organisation

- Notification and Approval of all remote country walks and expeditions is now done through the Evolve system, in common with other Category B and C visits and activities carried out by Devon and Torbay schools, settings and youth service establishments.
- The South West Mountain and Moorland Leader Training Scheme covers the moorland areas of the South West and the Brecon Beacons, excluding exposed ridges, gullies and steep ground. The South West Mountain and Moorland Leader Training Scheme Syllabus is at: [www.dartmoorcentres.co.uk/training](http://www.dartmoorcentres.co.uk/training) The Dartmoor Centres provide training courses for the SWMMLTS awards.
- The Walking Group Leader Award (WGL) renamed the Hill and Moorland Leader (MLE) gives approval to lead day walks on moorland anywhere in the UK in summer or winter, plus approval to supervise camping at non remote camp sites where the use of stoves is supervised by the leaders. (NB. If the WGL/ Hill and Moorland Leader assessor has included camping as an additional endorsement to the leader’s award, they are also approved to supervise camping at remote sites.)
- For Unaccompanied practice and qualifying ventures, Evolve forms should have Duke of Edinburgh selected as the Primary Purpose of the visit. This triggers the form to be sent automatically via Evolve through to the local DoE office. For all other ventures, the primary purpose of the visit should NOT be Duke of Edinburgh.
- For Expeditions in Wild Country it is the responsibility of the DofE Group Leader to forward a copy of the Green Form to the Wild Country Network.
- Copies of the Green Form may be obtained from <http://www.dofe.org/en/content/cms/leaders/expedition-areas/> from where additional information on the Award may also be obtained.
- **Devon:** Penny Douds, The DofE Devon Office, The Yard Youth centre, Fore Street, Moretonhampstead, TQ13 8LL 01647 440983 email: [penny.douds@devon.gov.uk](mailto:penny.douds@devon.gov.uk)

- Assessors must be on the Regional Approved Assessor list, or the Wild Country Network list, and have a current ID and reference number.

### **Water borne activities (DofE)**

Instructors, supervisors or assessors should have the required level of qualification described in the specific activity sections on water based activities.

For gold water borne expeditions, the green notification form should be sent at least six weeks before the activity.

### **Winter expeditions**

All ventures in the closed season, 1 November to 31 March inclusive, must be approved and particular care needs to be taken. If the winter venture goes into designated Wild Country areas, the Wild Country Network must also give their approval for that group to use that particular area.

### **Other hazardous activities**

For all other hazardous activities which take place under the Skill, Service and Physical Recreation Section of the Award Scheme leaders should follow the guidelines in the appropriate section in this booklet or refer to:

- **Devon:** Penny Douds, The DofE Devon Office, The Yard Youth centre, Fore Street, Moretonhampstead, TQ13 8LL 01647 440983 email: [penny.douds@devon.gov.uk](mailto:penny.douds@devon.gov.uk)





**Names of staff**

**Visit leader:**

**Other staff:**

**Volunteers:**

**Emergency contacts** (provide two if the activity is out of hours)

**1. Name:**

**2. Name:**

**Phone:**

**Phone:**

- I will ensure parental consent and medical forms are obtained indicating that all parents have received details and given their approval for their child to participate.
- I confirm that the visit will be arranged in accordance with *Outdoor Education, Visits and Off-Site Activities (2014)*
- A copy of the risk assessment for this educational visit (Form SOE6) is attached.

**Signature:**

**Date:**

**Visit Leader**

**Approved by:**

**Signature:**

**Date:**

**Head, manager or educational visits co-ordinator**

## Form SOE3: Parental consent for off-site activities

### Dear parent or guardian

You have already received details about our forthcoming visit or activity. Please complete and return this form giving your consent for your child to take part in this activity.

**School, college or establishment**

**Visit or activity**

**Dates and times**

**Name of child**

**Date of birth**

**Special details** - any information about your child's health which may need special attention, but does not prevent them from taking part should be noted below. (For example; any allergies, any medication needed and the dosage, travel sickness, diabetes, asthma or epilepsy?)

**Has your child had any relevant recent illness?**

**Does your child have any specific dietary requirements?**

**Do you have any additional comments?**

**Swimming ability** (for water based activities)

Is your child able to swim 50 metres? YES / NO

Is your child water confident for the proposed activity? YES / NO

1. I would like my child to take part in this visit or activity and having read the information provided agree to him/her taking part in the activities described.
2. I consent to any emergency medical treatment required by my child during the course of the visit.
3. I confirm that my child is in good health and I consider him/her fit to participate.

**Signature of  
parent or guardian**

**Date**

**Name of parent or guardian**

**Address**

**Telephone number**

**Home:**

**Work:**

**Name of family doctor**

**Approximate date of last tetanus injection:**

## Form SOE3a: Parental consent for local off-site activities (Annual consent form).

**Dear parent or guardian,**

This is a consent form to cover off-site trips and visits that your child may be undertaking during the school year. These visits may include short journeys on foot or in vehicles and some may continue beyond the school day. Details of each visit will be sent to you in advance. None of these visits includes any adventurous activity, or involves an overnight stay. A separate specific consent form will be sent out for visits involving adventurous activities or for residential visits.

**School, college or establishment**

**Outline of planned visits**

**Name of child**

**Date of birth**

**Special details** - any information about your child's health which may need special attention, but does not prevent them from taking part should be noted below. (For example; any allergies, any medication needed and the dosage, travel sickness, diabetes, asthma or epilepsy?)

**Has your child had any relevant recent illness?**

**Does your child have any specific dietary requirements?**

**Do you have any additional comments?**

- 4. I would like my child to take part in the programme of visits planned for the school year. I understand that the arrangements for each visit will be sent to me in advance.
- 5. I consent to any emergency medical treatment required by my child during the course of the visit.
- 6. I confirm that my child is in good health and I consider him/her fit to participate.

**Signature of parent or guardian** \_\_\_\_\_ **Date** \_\_\_\_\_

**Name of parent or guardian** \_\_\_\_\_

**Address** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Telephone number**  
**Home:** \_\_\_\_\_ **Work:** \_\_\_\_\_

**Name of family doctor**

**Approximate date of last tetanus injection:**

## Form SOE4: Summary of information about young people and adults participating in an off-site activity

Forename	Surname	Date of birth	Address	Next of kin	Contact phone number	Relevant medical information

## Form SOE5: Provider standards: use of commercial, charitable and private facilities

**To be completed by providers of outdoor education, visits and off-site activities to schools and education establishments.**

**Name of provider organisation:**

The provider named above is asked to give careful consideration to the statements below and sign in the space at the end of the form that the standard of service provided will meet the conditions listed. Please complete in full, putting “yes” “no” or “N/A” as appropriate in the right hand column.

Section A should be completed for all visits. Section B (Adventure Activities), Section C (Tour Operators) and Section D (Expeditions) should be completed if applicable.

<b>Section A - All Providers</b>	<b>Yes, No or N/A</b>
<b>Health, Safety and Emergency Policy</b>	
1. The provider complies with the relevant health and safety regulations, including the Health and Safety at Work Act 1974 and associated regulations for visits/activities, and has a health and safety policy and recorded risk assessments which are available for inspection.	
2. Accident and emergency procedures are maintained and records are available for inspection.	
3. The provider operates a policy for staff recruitment, induction and training that ensures that all staff with a responsibility for participants have the experience and competence to undertake their duties.	
4. There is a clear and communicated definition of responsibilities between the provider’s staff and visiting staff regarding supervision and welfare of participants.	
5. The provider has a Code of Conduct which will be employed where appropriate and supplied in advance of any booking. Visiting groups should adhere to the Code of Conduct.	
<b>Staffing</b>	
6. The provider has a safeguarding policy covering staff recruitment, induction and training. To support this policy all reasonable steps are taken to check staff/volunteers, who will have access to young people, for relevant criminal history and suitability for work with young people. (i.e. UK DBS checks)	
7. There are adequate and regular opportunities for liaison between school/organisation staff and the provider’s staff to agree learning outcomes and to agree if necessary any changes to the programme.	
<b>Insurance</b>	
8. The provider has public liability insurance for a minimum of £5 million.  (The Provider MUST NOT require the visit leader and / or participants to sign any form of insurance disclaimer / waiver. If such a form is used, the provider MUST send the form in advance of the booking, before any payment is made, to the visit leader.)	
<b>Inclusion &amp; Environment</b>	
9. The provider will take all reasonable steps to allow inclusion and participation of any young people who have special needs or have a disability, following a risk assessment process, in line with the Special Educational Needs and Disability Act 2001 and Disability Discrimination Act 2005.	
10. The provider encourages responsible attitudes to the environment and/or promotes wider	

sustainability issues as an integral part of the programme.	
<b>Vehicles</b>	
11. All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used.	
12. Where applicable drivers are PCV qualified or operate with a small bus permit and local minibus driving assessment.	
13. All drivers are appropriately insured and hold a valid licence to drive them on behalf of the provider.	
<b>Accommodation (if residential or main use accommodation is provided)</b>	
14. A fire risk assessment has been completed, reviewed appropriately and meets the requirements of the Regulatory Reform (Fire Safety) Order 2005.	
15. Security arrangements have been assessed and all reasonable steps taken to prevent unauthorised persons entering the accommodation.	
16. Separate male and female sleeping accommodation and washing facilities are provided. Staff accommodation is suitably located to ensure adequate supervision.	
<b>Section B – Adventurous Activities and Field Studies in Outdoor Environments.</b>	
<b>Activity Management</b>	
17. The ratios of staff to young people for the activities confirm to those recommended by the appropriate National Governing Bodies (NGB) & LA, or, in the absence of this, the provider's Code of Practice informed by risk assessment.	
18. The provider maintains a written code of practice for activities, which is consistent with relevant NGB guidelines or in their absence, recognised national/best practise standards.	
19. Staff competences are confirmed by the appropriate NGB qualification for the activity to be undertaken, or staff have had their competences confirmed by an appropriately experienced and qualified technical adviser.	
20. The provider has made an assessment of the first aid needs of employees and visitors/participants. There will be adequate and appropriate facilities along with access to a person with a valid and appropriate level of first aid qualification. Staff are practised and competent in accident and emergency procedures.	
21. All equipment used in activities is suited to the task, adequately maintained and monitored in accordance with statutory requirements and current good practice, with records kept on maintenance checks where necessary.	
<b>AALA Licence</b> For AALA licensable activities in the UK, the specifications in this section are checked as part of an AALA inspection. However, providers registered with AALA are asked to consider these applications with respect to any activities or aspects of their provision offered that are not covered by the licence.	
22. Adventure Activities Licensing Authority (AALA) Licence held.  Licence No:..... Expiry Date:.....	
<b>Section C – Tour Operators / Package Holidays</b> Where a tour operator delivers services using other providers e.g. ski schools, transport operators or accommodation, the tour operator must ensure that each provider meets the relevant specifications outlined in A and B of this form and that these providers operators to standards which meet the relevant regulations which apply to the country of operation.	
23. Sections A and B of the form, as appropriate, have been completed to show that checks have been made, records of which are available for inspection.	
24. The Tour Operator complies with package Travel Regulations, including bonding to safeguard customers' monies.	
25. Security in the case of Insolvency - There is an on-going legal requirement to have sufficient evidence of security for the protection of pre-payments in the event of insolvency under The Package Travel, Package Holidays and Package Tours Regulations 1992. This states that businesses offering "packages" must be able to provide this evidence at all times. Please tick to confirm that this is understood and will be complied with.	
26. ATOL, ABTA or other bonding body name and numbers:	
27. If abroad, the accommodation complies with fire, health and safety regulations, which apply in the country, concerned.	
<b>Section D Expeditions</b>	



28. The provider has completed sections A and B of this form and agrees to provide additional written assurance which are specific to the expedition being proposed and which will be made clear to the provider by the LA Outdoor Education Adviser.	
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**If any of the above specifications cannot be met, please give details below. Also please give details of any other accreditation with national governing bodies, tourist boards etc.**

**Organisation:**

**Signed:**

**Date:**

**Name:**

**Position:**

**Phone:**

**Email:**

**Thank you for completing this form. Please return via email to:**

*(This is a standardised form adopted by the South-West Outdoor Education Advisers' Panel for use by local authorities and schools.)*



## Form SOE6

**Establishment:**

**Activity or environment:**

**Educational objectives:**

**Completed by:**

**Assessment date:**

**Date reviewed:**

<b>1. Hazard</b> List significant hazards which may result in serious harm or affect several people.	<b>2. Who might be harmed?</b> List groups of people who are especially at risk from the significant hazards identified.	<b>3. Is the risk adequately controlled?</b> List existing controls or note where the information may be found (such as information, instruction training, systems or procedures).	<b>4. What further action is needed to control the risk?</b> List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.

## Reminder

- See the policy and guidance in *Outdoor Education, Visits and Off-Site Activities*.
- Generic risk assessments may be seen at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation) and on the Evolve web site. Details from the generic risk assessment do not need to be repeated in your activity specific assessment.
- In 2002 DCSF produced *A Handbook for Group Leaders and Group Safety at Water Margins*. These short reminders of good practice are available at: [www.babcock-education.co.uk/ldp/outdooreducation](http://www.babcock-education.co.uk/ldp/outdooreducation)

## In your risk assessment have you considered and made reference to:

- travel and transport arrangements?
- the needs of the whole group, including young people with special needs, a significant medical condition or disability?
- how you know that an external provider you are using is suitable?
- the experience or expertise of members of staff?
- accommodation arrangements, evening and overnight supervision?
- the places you are visiting? Have you been able to carry out a pre-visit? If not, how do you know what to expect?
- your Plan B, if conditions require a change from your original plan, or in an emergency?

## On going risk assessment:

- Apply the control measures.
- Monitor how effective they are.
- Change, adapt and revise as circumstances and the needs of the group require, such as for weather conditions and illness.

## Once measures are in place to control any risks, is the remaining risk acceptable?