

PERCY HEDLEY EDUCATION SERVICES

Residential Trips

Introduction

Taking students off site covers a vast range of activities, from supervising students onto buses at the end of the school day to taking a group of youngsters on a residential trip.

Guidance is also available from the government's 'Advice on legal duties and powers for local authorities, head teachers, staff and governing bodies', which can be downloaded from www.education.gov.uk.

The Health and Safety Executive (HSE) has also produced guidance, 'School trips and outdoor learning activities – tackling the health and safety myths', which can be found online at www.hse.gov.uk.

If you are leading or participating in an educational visit, you need to understand where your responsibilities lie, if in doubt, ask your Associate Director.

Purpose

To reinforce learning providing opportunities within a functional setting.
Provide experiences to enhance wellbeing and independence.

Scope

Responsibilities of Employers

Within the Health & Safety at Work Act 1974 ensure, as far as is reasonably practicable:

- the health, safety and welfare of staff
- the health and safety of pupils/students
- the health and safety of its visitors, e.g. parents and volunteers who are involved in their activities.

Responsibilities of Employees

Employees also have duties under the Health & Safety at Work Act 1974. They must:

- take reasonable care of their own and others' health and safety
- co-operate with their employers on health and safety matters
- carry out activities in accordance with training and instructions
- report hazards and defects observed whilst at work.

Responsibilities of Governing Bodies

Governors should be consulted and give their approval to trips overseas, those involving travel by air or by sea and those involving at least one night's absence. The following information ought to be conveyed to Governors when their approval is sought:

- the nature/purpose/length of the trip
- the number and ages of the students
- the number of staff and volunteers who will be present
- the experience of the volunteers
- the name and relevant experience of the party leader.

Governors should satisfy themselves that a sufficient number of staff will remain to run the school effectively when educational visits take place during term time.

Written procedures for approval of educational visits should be in place. Approval could be given by the full Governing Body by the Chair on its behalf or through a sub-committee.

Responsibilities of Associate Directors, Heads of School and College

Associate Directors and Heads of School/College are responsible for the internal organisation, management and discipline in schools and for consulting their employers to ensure that satisfactory arrangements are made for educational visits.

It should be ensured that:

- all preparatory work, including travel arrangements and risk assessments, are completed
- adequate child protection measures are in place
- the group leader has sufficient experience and time to organise the visit
- training needs have been considered by a competent person
- any necessary approval has been given
- adult to student ratios are appropriate
- first aid facilities are adequate
- arrangements are in place for those with medical needs
- appropriate insurance cover is in place
- all consent forms have been signed
- the group leader/supervisor and nominated persons have a list of all the students and adults on the visit, the contact details of each of them and a copy of the procedure to be followed in an emergency
- the address, telephone number and name of contact person at the venue are obtained
- a contingency plan is in place which caters for any changes in the itinerary or for any delays.

The Educational Visits Co-ordinators should:

- liaise with the employer to ensure that visits meet the employer's requirements, including those of risk assessment
- support the Associated Director, Heads of School/College and Governors in their decision-making roles
- assign competent people to lead or supervise a visit

- make sure that the appropriate child protection checks have been made
- work with the group leader to obtain the consent or refusal of parents
- organise emergency arrangements
- keep records of individual visits (including reports of accidents and 'near-accidents').

Group Leaders

If you are the group leader of an educational visit, you will have overall responsibility for the group at all times. Before a visit, the group leader should:

- obtain approval for the visit
- undertake or secure a risk assessment of the proposed visit, including appropriate contingency and emergency arrangements ('Plan B')
- decide what the staffing, supervision and training needs are
- ensure that the visit is insured adequately, in accordance with school, college or LA authority policy
- plan transport arrangements
- inform parents and obtain parental and medical consent
- prepare students for the visit
- conduct an exploratory visit.

During a visit, the group leader must ensure that:

- she/he takes general charge of the visit and activities and considers the risks involved in any decisions to follow the normal course of the visit, or in implementing any alternatives
- accompanying adults fully understand their supervision responsibilities
- regular head counts are carried out
- supervision is ongoing during downtime before, between and after activities
- the accommodation is safe and secure
- there is proper supervision and basic safety during travel
- ongoing risk assessments are undertaken
- everyone understands/agrees the emergency procedures.

Volunteers

Many educational establishments take parents and other adults who are not members of staff to help out on visits. The role of these volunteers should be made clear, they must be told who they are responsible to and whether (and if so, when) they can act alone without support from a member of staff. It should also be ensured that the insurance arrangements for the visit cover volunteers.

Volunteers should be subject to checks for criminal record and those appropriate to ensure child protection.

It is clear from cases that have come before the courts that the concept of 'in loco parentis' (literally meaning 'in place of parents') dominates the legal responsibilities of members of staff in their relationship with students in their care. Consequently, those accompanying or supervising students on educational visits may, throughout, do what is reasonable to safeguard or promote the interests of the students. They are therefore expected to exercise at least the same degree of care as that which would be taken by the average, careful parent in the same circumstances. The

standard of care that a court expects might vary according to the type of activity, the age and maturity of the students and the changing conditions.

Employer's insurance arrangements should include cover for claims of negligence. If you are unsure, seek confirmation from Head of School/College.

Principles

Risk Assessments

The Management of Health and Safety at Work Regulations 1999 require employers to assess the risks of activities, introduce measure to control those risks and inform their employees of these measures. Employers must ensure that those carrying out risk assessments are competent to do so. The five steps to risk assessment involve the following:

- identifying the hazards
- decide who might be harmed and how
- consider what safety measures need to be implemented to reduce the risks to an acceptable level
- record the findings
- review the assessment at intervals.

When assessing the risks of educational visits, the following should be considered:

- a) the type of activity
- b) the age/competence/fitness/usual standard of behaviour of the students
- c) any special educational/medical needs of students
- d) adult to student ratios
- e) the competence/experience/qualifications of the adults
- f) modes of transport, journey routes and location(s) of visits
- g) emergency procedures.

The HSE's 'Five steps to Risk Assessments' is available from the HSE website at www.hse.gov.uk/risk/fivesteps.htm (see separate file)

Generic risk assessments

Generic risk assessments consider the risks inherent in the activities to be undertaken and will involve an examination of issues outlined in a-g above, identifying the precautions necessary to ensure that risks to health are minimised.

Visit/site specific risk assessments

These consider the risks associated with the particular visit/site, which might include:

- the medical needs of students, have enough medication and contingency plans if an adult has to accompany a student to hospital
- behaviour of students, control measures include a code of rules
- weather conditions, control measures include obtaining local information about tides, potential for flooding and the likelihood of sudden weather changes.

The assessment should always have a pre-assessed 'Plan B' for contingencies. For example, what is the 'Plan B' if your coach breaks down abroad?

It is good practice for an exploratory visit to form part of the visit/site specific risk assessment, which will assist with pre-planning. If this is not possible information/advice could be sought from others involved in previous visits or from reliable local guides.

Consider involving students in the planning of the visit and risk assessments so that they are better prepared and will therefore make more informed decisions and be less at risk.

Ongoing/dynamic risk assessments

Ongoing/dynamic risk assessments involve a reassessment of the risks while the visit is taking place and as the need arises. Risks may need to be reassessed in the light of changing weather, new safety warnings, illnesses, behaviour problems or emergencies.

Activities in or near water

Fatalities in educational visits have tended to occur when students are involved in activities in or near water. It is therefore important that risk assessments should take account of:

- the competence of the group leader and the other adults who will be present
- adult to student ratios
- potential hazards – an exploratory visit will assist in identifying these but if this is not possible obtain as much information as possible by other means
- the likelihood of someone falling into the water
- foreseeability of a ‘panicky swimmer’
- underwater hazards (eg rocks or strong currents)
- getting the group in and out of water easily
- changes in weather
- tidal conditions.

The document above also stresses the need to have a range of alternative plans if arrangements need to be changed for any reason.

Farm visits

Risk assessments on the taking of students to farms should include hazards associated with *E.coli* 0157 and other infections as well as those arising from the misuse of farm equipment. Precautionary measures include:

- making sure that students wear appropriate footwear and clothing
- covering cuts and grazes on hands with waterproof dressing
- not allowing students to eat, drink or chew anything (including sweets) outside of designated areas
- reminding students not to suck fingers or put hands/pens/pencils/crayons, etc. in their mouths
- never allowing students to kiss animals or place their faces against them
- ensuring that students wash their hands thoroughly before and after eating, after any contact with animals and again before leaving the farm

- making sure that students do not use or pick up tools (eg spades and forks) unless permitted to do so by farm staff and that they do not ride on tractors or other machinery.

If a member of the group shows signs of ill health after a farm visit, they should consult a doctor as soon as possible and explain that they have been in recent contact with animals. For further information, see the HSE's information sheet, 'Preventing or controlling ill health from animal contact at visitor attractions, which includes a supplement for teachers and others who organise visits for children and can be downloaded from the HSE website at www.hse.gov.uk/pubns/ais23.pdf. (see separate file)

Insurance

All participants on an educational visit must be fully and correctly insured. With a vast range of travel insurance policies and firms to choose from, it is important to study policies carefully before paying the premium. Examples of cover needed may include:

- public liability
- third party liability, (ie cover for adults supervising students)
- claims for negligence
- personal accident cover for all adults and students
- costs of medical treatment
- specialised or high risk activities
- damage to or loss of hired equipment
- programmed and non-programmed activities
- expenses in emergencies
- cancellation and delay
- transport and passenger liability
- loss of baggage and personal property
- failure or bankruptcy of provider
- legal assistance/fees in the recovery of claims.

It is also essential to be aware of the risks excluded from a policy. Approval for visits should not be confirmed until minimum insurance cover has been arranged.

Accounting for money

A budget should be prepared well before departure. It should list all items of potential expenditure (eg transport, insurance, additional staff costs, entrance or other fees, board and lodging or hiring costs) and include a clearly identified contingency/emergency fund. One person should be appointed as treasurer to take charge of the finances. Information on the finances should be available to those who may reasonably wish to see them. Money allocated for the visit should be paid into a separate account, ideally with more than one signatory. Clear written accounts of money collected should include:

- the date of each transaction
- who the payment was to or from
- the cheque number
- the resulting balance.

Staff who agree to collect money are 'bailees' and are therefore responsible for the money while it is in their possession/safekeeping. Therefore, they may be expected

to reimburse money that is lost or stolen. Arrangements for insurance should consider cover for this event.

It is preferable to over-estimate the cost of the trip and give a refund rather than to undercharge and pursue payments after the event. Schools/colleges should have a written policy for charging for educational visits, which should include information on the circumstances in which charges can be remitted in whole or in part.

Informing Parents and obtaining Parental Consent

Parents must be fully informed (in writing) about the proposed visit before they are asked for their consent. This means that parents should be given some information of the risks involved in the visit as well as the measures in place to minimise these risks. In addition, as individuals have the right to access 'recorded information held by any public body', under the Freedom of Information Act 2000, this information should be prepared with public access in mind. Written information should normally include:

- the date and purpose of the visit
- the departure and return times
- the collection point(s)
- the travel arrangements (and name of any travel company)
- the number of students in the group and what the supervision arrangements are (including times of remote supervision)
- accommodation information (including security and supervision arrangements on site)
- what the provision for special educational or medical needs are (see below)
- what the procedures are for students who fall ill (see below)
- the names of the group leader and the other members of staff and adults who will be present
- the staff contact at home
- information about activities, the risks they present and how they will be managed (including information about 'Plan B')
- the standards of behaviour expected (eg in relation to alcohol, sexual behaviour, smoking discipline, and items which may not be taken on the trip). Parents should always be asked to sign a code of conduct form and be informed of the consequences if these standards are not met (eg withdrawal from activities and asking parents to collect their child early in extreme cases)
- what the insurance arrangements are for lost luggage, accidents, cancellations, medical cover, as well as any exclusions from policies and whether parents need to purchase additional cover
- the inoculations necessary
- what clothing/equipment/money should be taken by each student
- information about host families (on exchange visits)
- the cost and what it covers.

It is common practice to invite parents to attend meetings before residential visits, overseas travel or adventure activities.

The government has advised that schools have a 'one-off' consent form which parents are asked to sign on enrolment, covering their child's participation in trips

and other off-site activities throughout their time at the school. It has produced a consent form which is available from the Department for Education website at www.education.gov.uk. The form includes consent to any first aid or urgent medical treatment required by their child while they are away, which could include anaesthetics or blood transfusions. Whether educational establishments choose to use one-off consent forms or a separate form for each trip, they will need to consider the possible consequences of a refusal, for example, the feasibility of allowing a student to go on a trip.

Obtaining information about students

Any information about a student that is likely to be relevant to the management of the educational visit should be provided by parents.

The needs of students with special educational needs and/or medical needs must be considered when making decisions on the number of adult supervisors and of any special skills that might be required. Educational establishments will be mindful of their duties under the Equality Act and should try to ensure that the benefits of visits are available to disabled students.

Apart from specific information which might be required by the venue or tour operator, parents should be asked:

- if their child has any allergies or phobias
- if their child takes any medication (if so, who should administer it during the trip and how should this be done)
- if their child has had any illnesses recently
- what the contact details for their child's doctor are
- if their child has any dietary needs
- whether their child suffers from travel sickness
- whether their child has any irregular sleeping patterns
- about their child's swimming abilities or other competencies, if relevant (eg skiing standard)
- to provide their contact details, including their reserve contact information
- if there is any other information they consider relevant.

On one residential field trip, for example, a student wandered from the dormitory in the night and fell from a balcony; her parents had failed to advise the school that their daughter was a sleep-walker. Parents have a duty to provide adequate information about their child to those who are organising a trip.

Supervision

How many adults should accompany a group?

There are no legal requirements. Supervision should be based on an assessment of the number and expertise of adult supervisors necessary, taking into account the nature and hazards of the trip, the number/age/gender aptitudes/special needs of the students, the competence/experience of the adults, as well as the time of the year. If a student is taken ill or another emergency arises, one adult can deal with it while the other looks after the rest of the party (suitably altering the activities to reflect the lower level of supervision). Trips involving hazardous activities will normally require a smaller ratio than those that do not. It is also advisable that at least one female

and one male adult should accompany a mixed gender group, especially if it comprises of older students.

Foreign language exchanges

Though more difficult to organise, foreign language exchanges have increased in popularity. There is nevertheless public concern about potential dangers of students staying with families in a foreign country. In seeking to minimise these risks, educational establishments should consider the following:

- select a partner school carefully and establish a close line of communication. A good start is to consider schools in a district which has twinned with yours
- agree a clear 'modus operandi' in respect of timing and frequency of visits
- ensure that all costing are accurate
- all accompanying staff, adults and students must be fully briefed
- provide students at both ends of the exchange with literature and maps
- the exchange of telephone calls/emails/letters between families on both sides will help build up confidence
- inform hosting families in writing of any special dietary requirements and that guests should not be taken on hazardous activities (eg skiing) without prior consent
- contact with host colleagues in the link school should be maintained throughout the exchange
- ensure that emergency procedures are in place.

After the exchange has taken place, it should be evaluated, with input from students, staff and host families. Feedback should be given to the partner school to assist in the planning of future visits.

Transport

When planning a visit, careful thought needs to be given to transport. This aspect of the visit must be subject to risk assessment and include:

- passenger safety
- competence level and training of the driver, and whether she/he has the correct licence
- number of driving hours
- capacity and experience of the driver to maintain concentration (for example, is more than one driver needed to avoid fatigue?)
- type of journey (eg is it a local trip or long distance one?)
- traffic conditions
- contingency funds and arrangements in case of a breakdown or an emergency
- insurance cover
- the weather
- stopping points on long journeys
- supervision.

Minibus safety

The law covering minibuses is complex. The most authoritative guide to their use by schools/colleges is, 'Minibus safety: A Code of Practice (RS GEN 146) published by the Royal Society for the Prevention of Accidents (RoSPA) and is available from their

website at www.rospace.com. (see copy in separate file). ATL endorses the Code and recommends that all schools/colleges follow it and make copies available to their staff.

While a minibus can be driven on a normal car driver's license, RoSPA advises that formal training should take place before anyone is authorised to do so and that regular re-testing occurs. RoSPA runs minibus driving courses in centres nationally. The Minibus Driver Awareness Scheme, a national assessment and training scheme organised by the Community Transport Association, is also available for minibus drivers in the voluntary and not-for-profit sectors; visit www.communitytransport.com for further details. Many LAs also run minibus training and assessment courses.

A minibus driver should not be expected to ensure passengers remain well behaved and strapped into their seats throughout a journey whilst driving. Ideally, at least one other adult should be on board to maintain discipline and be a trained minibus driver, unless the journey is very short.

Driving licences

In most instances, minibus drivers must hold a D1 PCV (Passenger Carry Vehicle) licence. However, drivers who gained their ordinary (category B) licence prior to 1 January 1997 can legally drive minibuses 'not for hire and reward'. This can be interpreted as students not being obliged to pay in exchange for the right to be passengers. The Driver and Vehicle Licensing Agency (DVLA) appears to regard school/college minibuses as being driven on this basis and as long as they have a permit under the scheme for non-profit making groups, individuals can drive their minibuses. Independent establishment schools which do not have charitable status could be viewed as commercial entities and are therefore advised to seek confirmation from the DVLA that they meet this criteria.

Volunteer drivers aged over 21 who passed their tests after 1 January 1997 are also exempt from the requirement to hold a PCV licence and are allowed to drive a minibus with up to 16 passenger seats if:

- they have held a category B licence for at least two years
- the vehicle's gross weight does not exceed 3.5 tonnes (4.25 tonnes including any specialised equipment for carriage of disabled passengers).

More information is available from the guidance, 'Licensing incidental Drivers of the School Minibus', which is available from the Council for Learning Outside the Classroom (LotC) website at www.lotc.org.uk.

Seatbelts

Seatbelts are required on all minibuses/coaches where groups of three or more children aged 15 or under are taken on 'organised trips' and where their transportation is central to the purpose of the event. It is the driver's responsibility to ensure that children:

- aged under three years of age use an appropriate child restraint
- aged from three years up to their 12th birthday and below 1.35 metres (4'5") in height use an appropriate child restraint if available, and if not, wear the seat belt

- aged 12 and 13 years (and younger children who are 1.35 metres or taller) use the seat belt.

Passengers aged 14 years or more must wear a seat belt and are personally responsible for doing so.

Further advice is available in the Department of Transport's website at www.dft.gov.uk.

Buses at the school gate

So that they can see students onto and off the site, it is common practice for staff to remain on rostered duty for a reasonable period (approximately 10 minutes, for example) before and after the school day.

Within the school grounds

Some schools receive a large number of students via contract buses and, to minimise the risk of an accident when students are entering or leaving the buses, have created parking bays within the school grounds. The buses come into named bays and students can be released to board the buses in an orderly way. Occasionally, buses arrive late. ATL's view is that staff should not be expected to stay more than 15 minutes after the bus is due to arrive before reporting the matter and handing responsibility for the students left on site to a designated senior manager. Parents and staff should be told about the procedure to be used if buses arrive late.

Buses outside the school grounds

Members may not realise that seeing students onto either hired transport or service buses outside the school grounds constitutes taking them off site. Special care needs to be taken in these situations, especially if this involves seeing students across the road. Only the police, traffic wardens and official school crossing patrols have the legal right to control traffic. Those who assume responsibility for seeing students across a road in the absence of a school crossing patrol must discharge this activity reasonably and to the best of their ability. A safe crossing point must be chosen carefully. Most groups will probably require more than one adult to supervise the road crossing adequately. Staff who perform these tasks should be treated as volunteers, unless their contracts/job descriptions oblige them to do so. It is essential that:

- they obtain written confirmation from their employer that, in the event of an accident befalling a student during that supervision, there is full insurance cover
- they write to their employer making it clear that they will carry out this task in a voluntary capacity.

Work Experience

Guidance on work experience covering issues such as health and safety and insurance can be found in the booklets entitled, *Work Experience: A Guide for Secondary Schools* (ref. DfES – SPD/WES/01/02) and *Work Experience: A Guide for Employers* (ref. SPD/WES/01/1199[rev]); both are available from the DfE website at www.education.gov.uk (see separate file)

Training

Staff should be experienced and have undergone the following training dependent upon the populations of pupils/students:

- Moving and handling
- Mealtime management
- Administration of medication
- First Aid
- Child/adult protection safeguarding
- Health and Safety
- NAPPI
- Specific training associated with individual's needs:
- Epilepsy
- Diabetes
- Behavioural management approaches

Monitoring and Compliance

- H&S senior manager
- Associate Directors

Annually

Associated policies

- Health and Safety
- Child/adult protection
- Moving and Handling
- Administration of medication
- Missing Child/adult
- Behaviour/NAPPI
- First Aid

FURTHER INFORMATION

Publications

Community Transport Association

Website: www.communitytransport.com

Guidance; Minibus driver awareness scheme

Department for Education

Website: www.dft.gov.uk

Guidance: Guidelines on incidental driving of minibuses: licensing incidental drivers of the school minibus

Health and Safety Executive

Website: www.hse.gov.uk

Guidance:

- School trips and outdoor learning activities; tackling the health and safety myths
- Preventing or controlling ill health from animal contact at visitor attractions, which includes a supplement for teachers and others who organise visits for children
- Five steps to risk assessment

- Reporting of injuries and dangerous occurrences.

Royal Society for the Prevention of Accidents

Website: www.rospa.com

Guidance: Minibus safety: A code of practice

Websites

Adventure Activities Licensing

Website: www.aals.org.uk

Adventuremark

Website: www.adventuremark.co.uk

Council for Learning Outside the Classroom

Website: www.lotc.org.uk

Driver and Vehicle Licensing Authority

Website: www.dvla.gov.uk

Outdoor Education Advisers' Panel

Website: www.oeap.info

School Travel Forum

Website: www.schooltravelforum.com