GOING OUT THERE

Going Out There

Scottish Framework for Safe Practice in Off-site Visits

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This framework has been developed in partnership by the Scottish Government, the Health and Safety Executive (HSE), the Scottish Advisory Panel for Outdoor Education (SAPOE), Education Scotland and the Association of Directors of Education, with input from other partners including voluntary organisations and providers



Scottish Government
Riaghaltas na h-Alba
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Glossary of Terms

This framework is relevant to everyone who provides planned learning for children and young people in Scotland, whether as part of early years, school, through social work services and colleges, community learning and development, outdoor learning, adventure and play organisations or the voluntary sector.

Visit Leader: The Visit Leader is responsible to the Head of Establishment and is the person with the main supervisory responsibility for leading participants in an outdoor experience or on an off-site visit. They are responsible for the young people before, during and after the off-site activity. The Visit Leader is responsible for the detailed organisation of the excursion according to the policies and procedures of the Employer. They will present their plans to the Head of Establishment for approval.

Visit Assistant (e.g. parent helpers): Carries out supervisory duties as instructed by the Visit Leader. They are an adult with responsibility for supervising participants during the visit and also, where specified, may be delegated to deputise for the Visit Leader in an emergency situation.

Educational Visits Coordinator: While the Head of Establishment holds the ultimate responsibility for managing off-site activities, it can be beneficial to delegate the immediate management of visits to a staff member in the role of Educational Visit Coordinator (EVC). The EVC is accountable to the Head of Establishment for overseeing all educational visits, ensuring the arrangement details are thoroughly checked, approving visit plans, and following employer guidance to ensure best practice. This role is typically filled by a senior staff member with extensive experience leading various types of visits, appointed by the Head of Establishment, and acting on their behalf.

Head of Establishment: Responsible to their employer and is the person with the immediate management responsibility for groups or individuals who are participating in off-site activities. Throughout this guidance, the term Head of Establishment is used to refer to, for example, the Head teacher/ Principal/Rector of a school, or the Manager/Director or individual with responsibility for the day to day running of an organisation.

Employer: For state schools, the Employer is the Local Authority. For independent schools, the Employer is the Governors or Trustees. For other organisations, the Employer could be the Chief Executive Officer, owner or equivalent.

Technical Advisor: Within this guidance the term Technical Advisor is used to refer to 3 different roles:

1. In the context of a Local Authority or Employer, the Technical Advisor is a nominated individual with the skills, knowledge and responsibility to oversee and manage off-site visits.

2. Some Employers may have a different individual or Technical Advisor with responsibility to provide advice regarding Adventure Activities.

3. In the context of Adventure Activities licensing, a Technical Advisor is someone with specific qualifications and experience that provides specialist advice in relation to one or more identified activities.

Local Authority: Is responsible for a range of services for both individuals and business which include education.

Parent / Guardian / Carer: The parent/legal guardian/carer of the young person attending the visit.

Participants: The children, young persons or clients as appropriate.

Provider: A person, organisation or business responsible for the delivery of a service or activity to young people.

Ratios: The appropriate ratio of staff to pupils for a Visit as determined by the Risk Assessment.

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1. Introduction

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1.1 Introduction

Giving more children and young people access to outdoor learning and play opportunities provides invaluable life experiences which could not be achieved without 'going out there' more regularly and more frequently.

The vision within Scottish Governments Learning for Sustainabiity:action plan 2023 to 2030 highlights that our children and young people recognise the importance of climate and social justice, equality and outdoor learning for their future life and work in the 21st century and want these to be a real and meaningful part of their daily learning experiences and their learner journey as a whole.

Scotland's outdoor environment offers motivating, exciting, varied, relevant and easily accessible activities from pre-school years through to college and beyond



There is a growing need for schools and other groups to make the most of the vast learning potential of the outdoors by 'going out there'

This framework, which provides user-friendly processes compliant with health and safety legislation, aims to increase opportunities for all Scotland's children and young people to access their learning through off-site visits and the outdoors, enabling their entitlement to **Learning for Sustainability**, and improving learning outcomes for all.

Scotland's outdoor environment offers motivating, exciting, varied, relevant and easily accessible activities from pre-school years through to college and beyond. Through **Curriculum for Excellence**, and Learning for Sustainability, the Scottish Government endorses the value of children and young people enjoying positive learning and play experiences in a wide variety of settings from galleries and museums to woodlands, parks and wild, natural spaces, as well as planned adventure and residential experiences. An enjoyable, creative, challenging learning journey helps children and young people learn by experience and grow as confident and responsible citizens who value and appreciate their local area and the wider environment of Scotland, as well as further afield.

There is a growing need for schools and other groups to make the most of the vast learning potential of the outdoors by 'going out there' and Employers and those leading groups need to have confidence that the approach they are taking meets legal requirements and helps enable positive experiences for children and young people. While Local Authority or Employer guidance and regulations remain authoritative, it is expected that 'Going Out There' should be adopted as a common framework across Scotland by all those managing or organising visits or providing activities and venues. It seeks to increase confidence and co-operation and recognises in particular that the vast majority of outdoor learning involves routine visits to places in the local area.

Going Out There was developed in partnership by the Scottish Government, the Health and Safety Executive (HSE), the Scottish Advisory Panel for Outdoor Education (SAPOE), Education Scotland and the Association of Directors of Education, with input from other partners including voluntary organisations and providers.

The HSE statement[1] makes clear that:

- The focus should be on how the real risks arising from such visits are managed rather than a focus on paperwork
- There is a need for a proportionate and sensible approach for planning and organising off-site activities
- Those managing visits should streamline the planning process and authorisation arrangements for visits that involve everyday risks
- HSE's primary interest is real risks arising from serious breaches of the law. Any HSE accident investigation will be targeted at these issues



Accidents and mistakes may happen on visits – but fear of prosecution has been blown out of proportion

If things do go wrong during a trip, provided sensible and proportionate steps have been taken, it is highly unlikely that there would be any breach of health and safety law involved

1.2 Incidents and Accidents

Accidents and mistakes may happen on visits – but fear of prosecution has been blown out of proportion leading to a fear of taking children and young people off-site and outdoors.

HSE has made prosecutions in rare cases where there was evidence of recklessness or a clear failure to follow sensible precautions. However, it is important that Employers and leaders do not interpret this as meaning that to avoid prosecution they must eliminate even the most trivial risks. Employers and leaders are expected to deal with risk responsibly and proportionately.

If an incident on a visit leads to the death or serious injury of someone, HSE will normally investigate. Most serious accidents on visits involve underlying management failures and HSE always looks for these underlying causes. HSE does not investigate incidents in response to civil claims.

If things do go wrong during a trip, provided sensible and proportionate steps have been taken, it is highly unlikely that there would be any breach of health and safety law involved, or that it would be in the public interest for HSE to bring a prosecution.

[1] https://www.hse.gov.uk/education/assets/docs/school-trips.pdf

1.3 Adopting this Framework

Adoption of the framework allows Employers to fulfil their responsibilities for outdoor experiences and off-site visits for all participants

The framework has been developed to enable its widest possible adoption, integrating support for Employers with planning and provision at Local Authority or Employer level and with management, delivery and practice at establishment level.

Adoption of the good practice exemplified in the framework allows Employers to fulfil their responsibilities under the Health and Safety at Work Act 1974[2] for outdoor experiences and off-site visits for all participants.

This guidance does not cover work experience.



[2] http://www.hse.gov.uk/legislation/hswa.htm

1.4 Going Out There Framework and The UN Convention of Rights of a Child (UNCRC)

The 'Going Out There' framework integrates the principles of the UNCRC by ensuring safe, enriching, and equitable outdoor experiences for children and young people. By embedding children's rights into its structure, the framework not only enhances educational outcomes but also upholds their fundamental rights to participation, development, and well-being.

The framework aligns with the four general principles of the UNCRC:

- Non-discrimination (Article 2) – Ensuring all children and young people have equal access to outdoor experiences
- Best interests of the child (Article 3) – Prioritising the safety, well-being, and holistic development of children in all planning and decision-making
- Right to life, survival, and development (Article 6) – Providing opportunities that support physical, mental, and social development
- Right to be heard (Article 12) – Actively involving children and young people in decision-making about outdoor activities

By following the processes outlined in this document, you can confidently involve children and young people in planning safe and inclusive off-site visits and outdoor learning opportunities. Resources are available to support a consistent and equitable approach across all settings.

This framework also connects to key UNCRC articles, including:

- Article 24: Right to health
- Article 28: Right to education
- Article 29: Goals of education
- Article 31: Right to play, leisure, and cultural life



1.5 General Data Protection Regulation (GDPR)

GDPR impacts upon the collection, use and retention of participant information for educational visits.

Medical and dietary information, parent contact details etc. must be kept secure, regardless of how the data is shared or carried. If it is necessary to share personal data with an external organisation involved in a visit, the establishment should obtain assurances that the other organisation is GDPR compliant. For details: www.gov.uk/data-protection

If travelling out-with the UK, and sharing data with an external provider, it is important to ensure that similar safeguards regarding data are in place.

Written consent must be received for images used in marketing or if shared on social media. Sample consent forms, which include permission for images, can be found in the Toolkits.

Record Keeping

Personal data can be retained if there is a legal basis for having it. Examples of reasons for retaining records of visits and outdoor learning experiences include:

- To record the range of opportunities that your organisation provides
- To demonstrate effective planning and evaluation of trips and visits
- To evaluate and improve both safeguarding and learning
- When there has been an incident that may result in an insurance claim or legal action

Many local authorities in Scotland have an online system for the approval and recording of educational visits. Whatever system you use, if the records contain personal data:

- Your establishment should have a GDPR policy that gives guidance on retention
- The system itself must be secure.
- Access to the system must be strictly controlled
- If copies are made (on paper or electronically), e.g., to take on a visit or activity, they must also be kept securely,

- You must have a legal basis for having the data (e.g. parental consent)
- The purposes for keeping the data must be clear and be recorded
- You must be able to justify how long you keep the data and deleted when no longer needed
- Consent for the use of personal data (which includes photographs) should be kept for the duration that the data is retained

Record Keeping Following an Accident/Incident

For information about record keeping following an accident or incident see **Section 14.7**. Data relating to an accident or incident should be retained in line with Employers GDPR procedures.

1.6 Supporting Materials

Click to access tools and resources that can help

The framework is supported by tools, resources and accompanying examples of good practice for the planning and evaluation of different levels of outdoor experience and off-site visits, which are straightforward and user-friendly to apply. This includes a series of generic consent forms and risk assessments which can be adapted to individual circumstances as appropriate by Visit Leaders, and are easily uploaded into online recording and approval tools where these are being used locally.

The range of activities covered is as follows:

- Routine and Expected - regular activity as part of normal everyday practice in play and learning (including local off-site visits on foot, by private hire or public transport)
- One-off Day visits
- Residential Activities
- Visits further afield such as international trips and experiences
- Adventure Activities



2. Effective Practice in Managing Outdoor Learning Safely

2.1 Introduction

2.2 Employers Supporting Heads of Establishments

2.3 Helping Heads of Establishment to Support Visit Leaders

2.4 Identifying and Deploying Staff

2.5 Support and Development for Visit Leaders

2.6 Access to Technical Advice

2.7 Approval for Visits

2.8 Planning for Emergencies

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2.1 Introduction

The ability and competence of front line staff to plan and manage a dynamic situation in a safe and appropriate way is the key contributor to safe and successful practice in the different levels of outdoor experience and off-site visits.

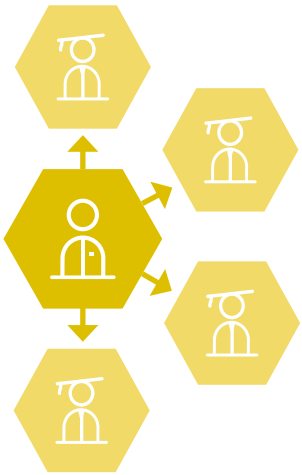


This is underpinned by:

- Employers supporting Heads of Establishment
- Heads of Establishment supporting, identifying and deploying staff with the right competences and experience for leading different levels of off-site visit
- Staff being given training and other opportunities to develop their knowledge, skills and confidence in planning, organising and leading outdoor experiences or off-site visits
- All staff having access to resources of relevant and competent technical advice

It is anticipated that Employers should adopt the above set of principles as common and effective practice and should provide support for Heads of Establishment and technical advice as required by local circumstances. By taking this approach, Employers will be using a straightforward and common framework which will reduce bureaucracy and satisfy the duties on them under health and safety legislation.

2.2 Employers Supporting Heads of Establishments



Employers have a clear duty to provide appropriate information, instruction and training to all their employees. Employers will monitor the effectiveness of their management and delivery of outdoor experiences and off-site visits. This should be a blend of systems-monitoring and on-the-ground-monitoring.

Employers will also support their employees in the delivery of activities by ensuring that the identification and assessment of the risks involved in participating in any outdoor experience and/or off-site visit have been completed prior to participation. As part of this process the Employer will also ensure that proportionate control measures are understood and implemented to deal with the risks identified.

This will be further supported by providing generic risk assessments for common outdoor and off-site activities and visits.

Employers have a clear duty to:

Provide	Appropriate information	Appropriate instruction	Appropriate training
Monitor	Effectiveness of their management and delivery of off-site visits	Effectiveness of their management and delivery of outdoor experiences	Blend of systems-monitoring and on-the-ground-monitoring
Support	In the delivery of activities	Generic, identified and specific risk assessments, are completed for all outdoor experiences and off-site visits	Appropriate control measures are understood and implemented to deal with the risks identified





2.3 Helping Heads of Establishment to Support Visit Leaders

The Employer's arrangements for planning, approval, monitoring, training and audit should support Heads of Establishment in assisting staff to lead outdoor experiences and off-site visits with increasing confidence and competence. Heads of Establishment should have ready access to their Employer's policies and guidance and to specialist competent advice on visits, outdoor learning and off-site visits.

Supporting Heads of Establishment includes identifying and fulfilling their development needs in relation to:

- Clarifying their role in approval
- Identifying and deploying appropriate staff as Visit Leaders
- Managing the development of effective outdoor learning practice in their establishments, including risk education within the curriculum
- Increasing the range and level of outdoor experience and off-site visits offered as a normal part of everyday activity for all participants
- Monitoring the quality of outdoor experiences and off-site visits and the impact of various patterns of provision
- Enabling the development of staff knowledge, skills and confidence in planning, organising and leading outdoor experience or off-site visits
- Implementing appropriate safety management that weighs up both risks and benefits

2.4 Identifying and Deploying Staff

The Head of Establishment, who approves each visit, should match the demands of the different levels of off-site visit to the competencies and experience of individual staff who may be interested in participating in off-site visits.



For Routine Off-site Visits in the local area or to local facilities no additional competencies over and above those of a competent professional working on-site should be required.



For Residential Visits, Heads of Establishment should decide who is competent to lead. However, staff may need experience of routine visits and of assisting with Residential Visits before acting as leader.



For Overseas Visits, Heads of Establishment should decide who is competent to lead. However, normally, staff will need experience of the above two types of visit and of assisting on an Overseas Visit before taking the leadership role.



For Adventurous Activities, the Head of Establishment should decide who is competent to lead. Staff should have competence in leading routine off-site visits. However, there may be a need for certain other defined competencies and skills for some Adventure Activity visits. Advice on this must be sought from the Local Authority[3] or Employer.

The Head of Establishment will ensure appropriate management arrangements are in place prior to the visit.

2.5 Support and Development for Visit Leaders

The Employer's arrangements for planning, approval, monitoring, training and audit should provide Visit Leaders with ready access to their employer's policies and guidance

The Employer's arrangements for planning, approval, monitoring, training and audit should provide Visit Leaders with ready access to their Employer's policies and guidance. This includes direct access to technical advice on visits.

Arrangements should enable Visit Leaders to be clear about their role and to feel supported and confident in it. Where development needs are identified, these should be fulfilled.

A key area for development of professional skills and competence in working outdoors or off-site is the ability of Visit Leaders to make dynamic risk assessments that take account of changing circumstances and events and cause them to respond appropriately. Training in risk management and approaches to risk

[3] https://sapoe.org.uk/our-members/

education, combined with developmental experience of planning, preparing for, and supervising visits should form part of professional learning opportunities for educators wishing to build capacity in this area. This should include opportunities to consider the many benefits of outdoor learning and the contribution that high quality outdoor learning makes to attainment, achievement and well-being across the curriculum. Access to advice and support should also be available.

2.6 Access to Technical Advice

Employers must have access to technical advice on visit and activity safety matters.

Employers must have access to technical advice on visit and activity safety matters. The adviser needs to have diverse experience of the range of outdoor activity and visit provision. They should be of sufficient authority to ensure that they can develop and take forward strategy, advice and guidance across all sectors and services.



The role of the adviser would normally involve:

- A good practical knowledge of the challenges encountered by groups in all venues or environments
- Assessing risks and identifying sources of advice
- Monitoring the visits including observing visits or arranging for this to be done by appropriate staff
- Reviewing policies and procedures in the light of lessons learned, and sharing good practice more widely
- Identifying training needs
- Being a source of expert advice on visits generally and on adventure activities, expeditions and Overseas Visits specifically
- Where necessary, seeking and obtaining the advice of other people with particular specialist knowledge, e.g. transport or insurance
- A good understanding of the relevant legal responsibilities around visits

2.7 Approval for Visits

Whilst the Employer has health and safety responsibilities it would be normal practice to delegate approval of Routine and Expected and simple Day visits to the Head of Establishment. Residential trips (not including those which involve adventure activities) should be approved by the Head of Establishment before notification to the Employer. Adventure activities and Overseas trips would normally be treated differently with approval being sought from the Local Authority or Employer taking into account technical advice. See the matrix for Visit Approval, Medical Information and Parental Consent in the **Toolkits section** of the website.

Routine and simple day visits	**Head of Establishment**
Residential trips (not including those which involve adventure activities)	**Head of Establishment before notification to the employer**
Adventure activities	**Approval from the Local Authority taking into account technical advice**
Overseas trips	**Approval from the Local Authority taking into account technical advice**

See the matrix for Visit Approval, Medical Information and Parental Consent in the Toolkits section of the website

For advice on the arrangements for gaining approval, contact your Local Authority[4] or Employer.

[4] https://sapoe.org.uk/our-members/

2.8 Planning for Emergencies

Heads of Establishment and Visit Leaders must ensure that they are familiar with the requirements of their Local Authority or Employer's emergency procedures

Employers must prepare and communicate emergency procedures for all off-site visits. Emergency procedures are an essential part of planning a visit. Local Authority establishments should follow their authority's guidance on emergency planning procedures, which should include a definition of an emergency or serious incident. Independent schools should have their own emergency planning arrangements, as should other organisations involved in planning and organising off-site visits for children and young people. Heads of Establishment and Visit Leaders must ensure that they are familiar with the requirements of their Local Authority or Employer emergency procedures.

Visit Leaders and Visit Assistants have a common law duty to act as a normal caring parent would. They should not hesitate to act in an emergency and to take life-saving action in an extreme situation.



3. Roles and Responsibilities

3.1 Introduction

3.2 Employer's Responsibilities

3.3 Heads of Establishment's Responsibilities

3.4 Educational Visits Coordinator Responsibilities

3.5 Visit Leader's Responsibilities

3.6 Visit Assistant's Responsibilities

3.7 Parents' Responsibilities

3.8 Participant's' Responsibilities

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3.1 Introduction

Under the Health and Safety at Work Act 1974 Employers are responsible for the health, safety and welfare at work of their employees. Employers are also under a duty to ensure, so far as is reasonably practicable, the health and safety of anyone else on the premises or anyone who may be affected by their activities. This includes participants in off-site visits.



3.2 Employer's Responsibilities

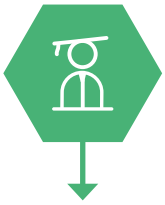


The Employer has the following main roles:

- Provide these guidelines and other Local Authority or Employer guidelines to Heads of Establishment and Visit Leaders
- Provide access to technical advice where necessary
- Assess proposals for certain categories of visit (especially visits or travel outside the UK and Adventure Activities)
- Have emergency procedures in place for dealing with major incidents/ emergencies
- Ensure training needs have been addressed
- Provide access to named staff for advice
- Have appropriate insurance cover in place
- Have in place procedures to monitor and review off-site visits and activities

3.3 Heads of Establishment's Responsibilities

Heads of Establishment are expected to follow and implement this guidance to ensure their responsibilities are fulfilled and that outdoor learning experiences and off-site visits can occur frequently and regularly and are managed safely. Heads of Establishment should ensure that the Visit Leader is competent to manage and monitor the risks throughout the visit.



Heads of Establishment are expected to follow and implement guidance

Heads of Establishment should also ensure that:

- The visit has suitable aims and effective ways of achieving them
- Appropriate child protection procedures are in place
- An appropriate risk assessment has been completed and proportionate safety measures are in place
- The needs of the staff and participants, including training needs, have been considered
- Parents have been appropriately informed
- The Visit Leader and accompanying adults have suitable experience, competencies and, where required, qualifications and Disclosure Scotland checks for the visit
- Visit Leaders are allowed sufficient time to organise visits properly
- Visit Assistants and other accompanying adults in a supervisory role are appropriately recruited and briefed (see **Section 4.12**)
- The ratio of other accompanying adults to participants is appropriate (see **Section 4.3**)
- The Employer has approved the visit, if appropriate
- Arrangements have been made for the medical needs and additional support needs of all the participants
- The Employer's policy on the administration of medicines has been followed
- Adequate first aid provision will be available
- The mode of travel and travel arrangements are appropriate
- There is adequate and relevant insurance cover in place
- Suitable contact arrangements are in place
- The emergency arrangements are in place and have been communicated to those who need to know
- There is a contingency plan, with clear lines of responsibility, which will cover incidents such as adverse weather, travel delays including a late return home

3.4 Educational Visits Coordinator Responsibilities

The Educational Visit Coordinator (EVC) supports Heads of Establishment and Visit Leaders with immediate visit management. The EVC will follow and implement this guidance to ensure that outdoor learning experiences and off-site educational visits are managed safely. Heads of Establishment should ensure that the EVC is competent to manage and follow guidance.

Visit Leaders will consult with and seek advice and guidance from their Local Authority and Head of Establishment



EVC's responsibilities will include (in addition to Head of Establishment responsibilities)

- Providing a first point of contact & suitable guidance for visit leaders in preparing visit plans, risk assessments and regular educational visit experiences to meet educational outcomes.
- Ensuring establishment guidelines are followed, and these align with employer guidelines and establishment policy.
- Carrying out any necessary external provider checks following employer guidance.
- Ensuring effective communication with employer advisors to ensure that educational visits follow the employers' guidelines including accessing any necessary technical advice.
- Assess the competence of Visit Leaders, staff and volunteers that are assigned to lead, supervise and support educational visits.
- Ensure any staff leading Adventure Activity have the necessary training and competence to lead the type of visit.
- Monitor visits, training and induction for visit leaders within the establishment following employer guidelines and policy.
- Oversee administrative audit trails of visits, staff training, consent etc. following establishment, employer and relevant national guidelines.
- Check and approve that visit plans are suitable for participants and support appropriate experiences, outcomes and learning.
- Communicate effectively with parents and carers to ensure inclusion, consent and accurate medical information is confirmed
- Follow employers visit approval procedures & timelines.
- Monitor and review activities including any accident or incident recording following employer procedures.
- Ensure necessary employer guidance and policy on GDPR, Safeguarding and child protection procedures are followed.
- Being trained in child protection issues

[5] https://sapoe.org.uk/our-members/

3.5 Visit Leader's Responsibilities

Visit Leaders will consult with and seek advice and guidance from their Local Authority[5] and Head of Establishment with regard to up-to-date agreements about practice and procedure in off-site visits.

Those in charge of participants have a common law duty to act as any reasonably prudent parent would and to do their best to ensure the health and safety of everyone in the group.

Visit Leaders will consult with and seek advice and guidance from their Local Authority and Head of Establishment



The Visit Leader has responsibility for:

- Having overall management responsibility during the visit - even if they are not physically supervising a part of the visit
- Preparing a Visit Plan (**see Section 4.2**)
- Obtaining approval of the Visit Plan from the Head of Establishment
- Following Employer policies and guidelines
- Ensuring adequate insurance cover is in place
- Ensuring good communication with parents, participants and accompanying staff
- Matching the off-site visit to the needs and abilities of all participants being mindful of equality and inclusion
- Obtaining sufficient information about participants to deal with any medical or behavioural needs
- Adequate first aid provision will be available
- Ensuring that any outside provider has relevant information about participants
- Appointing and briefing Visit Assistants, deputies and other adult supervisors where appropriate
- Being able to control, lead and instruct participants of the relevant age range
- Being trained in child protection issues

[5] hhttps://sapoe.org.uk/our-members/

3.6 Visit Assistant's Responsibilities



Visit Assistants, including parents and carers supporting visits as well as volunteers working for service providers, have an important role in supporting and enabling outdoor learning experiences and off-site visits. They can help with the running of an activity and be part of the supervision ratio where competent to do so. Often in Adventure Activity settings Visit Leaders/assistants/volunteers need to be included in the operational ratios. Visit Assistants should be carefully selected and be briefed and prepared for their role (see **Section 4.12**)

Visit Assistants should be carefully selected and be briefed and prepared for their role

Visit Assistants supervising participants must:

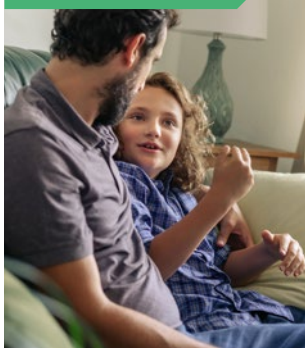
- Be made aware of the Visit Plan and any relevant risk assessments
- Understand how they can ensure the health and safety of everyone in the group
- Only be left in sole charge of participants where it has been previously agreed as part of the risk assessment
- Follow the instructions of the Visit Leader and help with control and discipline
- Inform the Visit Leader if concerned about the health or safety of participants at any time during the visit

3.7 Parents' Responsibilities

Parents should be able to make an informed decision on whether their child should participate in any visit and will need to:

- Provide the Visit Leader with emergency contact number(s)
- Give consent or inform the establishment if they decide to opt out
- If necessary, give the Visit Leader additional up to date information about their child's emotional, mental/psychological and physical health
- Prepare their child for the visit, especially when the establishment has identified the need for different clothing, rules and eating arrangements

Parents should prepare their child for the visit and provide the Visit Leader with all relevant information regarding their child



3.8 Participant's Responsibilities

In agreement with parents, the Visit Leader and the group, participants will:

- Not take unnecessary risks
- Follow the instructions of the Visit Leader, Visit Assistants and other supervisors including those at the venue
- Dress and behave sensibly and responsibly
- Be sensitive to local codes and customs
- Look out for anything that might hurt or threaten themselves or anyone in the group and tell the Visit Leader, Visit Assistant or venue supervisor about it
- Comply with the participants' Code of Conduct (where one exists)

Participants are responsible for following instructions and not taking unnecessary risks

Any participants whose behaviour may be considered to be inappropriate or a danger to themselves or to the group may be stopped from going on the visit. The aims of the visit for these participants should be fulfilled in other ways wherever possible.



4. Planning Visits

4.1 Introduction

4.2 Preparing a Visit Plan

4.3 Establishing Ratios

4.4 Communicating with Parents

4.5 Parental Consent and Medical Information

4.6 Preparing Participants

4.7 Supervision

4.8 Remote Supervision

4.9 Unaccompanied Visits

4.10 Exploratory Visit Plan

4.11 Gender of Accompanying Staff Ratios

4.12 Vetting Accompanying Adults Parents

4.13 Using an External Provider

4.14 Inclusion

4.15 First Aid

4.16 Electronic Equipment

4.17 Security and Terrorism

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4.1 Introduction

Whatever type of visit is being undertaken - a trip to a local park, museum or swimming pool, or a residential stay in the UK or abroad - time given for preparation will ensure good planning, maximise the potential benefits of the experience and help minimise the risk from any incidents.

The planning and approval of visits should be proportional to the activity. More complex activities will require more planning, involve more people and take more time. Heads of Establishment must satisfy themselves that the person planning the visit is competent and has the necessary relevant experience or access to appropriate technical advice.

Good preparation and planning → **Maximum benefits** → **Minimum risks**

4.2 Preparing a Visit Plan

A Visit Plan needs to be in place for all off-site visits. The Visit Plan outlines who is to do what, and when. The amount of content and detail in the Visit Plan will be determined by the nature of the trip. It is sufficient for Routine and Expected visits to be covered by a Visit Plan which is reviewed on an annual basis.

The Visit Plan will, as well as keeping everyone safe, help to ensure a successful and meaningful visit by focussing on the benefits of the activities and clearly setting out the aims and objectives.

The Visit Plan can be thought of as being in three parts:

- Prior to the visit
- During the visit
- Following the visit



The Visit Plan will form the basis of the information required by the Head of Establishment for granting approval

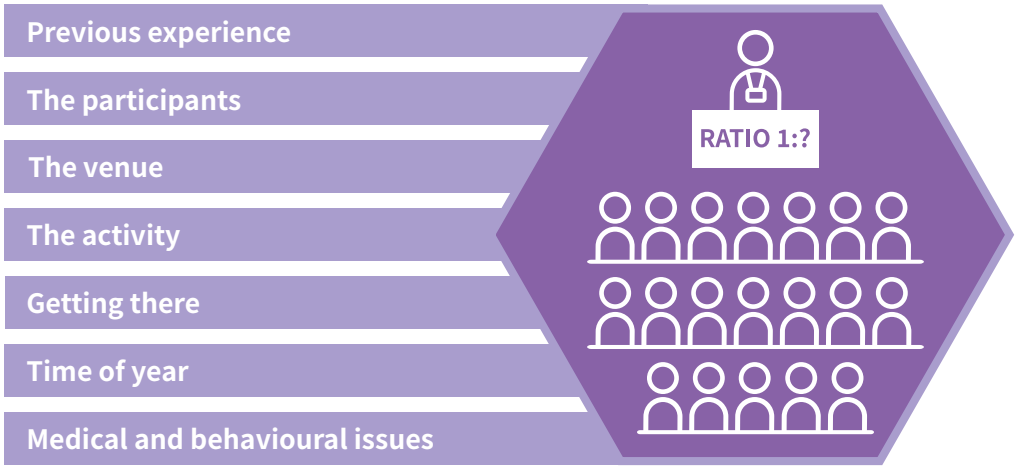
The Visit Plan will form the basis of the information required by the Head of Establishment for granting approval.

Examples of Visit Plans and what should be contained in them can be found within the **Toolkits section** for each type of visit.

4.3 Establishing Ratios

It is important to have a suitable ratio of adult supervisors to participants for any visit. The factors to take into consideration include:

- The participants, including Visit Assistants and Visit Leader (see **Section 4.11**)
- Previous experience (of participants and leaders)
- The venue
- The activity
- Getting there
- The time of year
- Medical and behavioural issues



Supervision ratios should be appropriate for the

- **nature and aims of the visit**
- **age and stage of the participants**
- **be agreed in the context of a risk assessment**

Supervision ratios should be appropriate for the nature and aims of the visit, for the age and stage of the participants, and be agreed in the context of a risk assessment. The establishment of ratios is best determined through discussion between Heads of Establishment and Visit Leaders.

The Head of Establishment is ultimately responsible for ensuring and approving an appropriate ratio of adults, including Visit Leaders and Visit Assistants, to children and young people taking part. Specialist advice should be sought via the Employer depending on the circumstances.

4.4 Communicating with Parents

Information provided to parents will differ depending on the category of visit. For Routine and Expected Visits they will not necessarily be informed every time their child goes off-site

The majority of off-site visits are a normal part of educational and other service provision (e.g. youth clubs) and are referred to within this guidance as 'Routine and Expected Visits'. The aim of this document is to keep the need for procedures to the minimum possible. When children join an establishment or group, parents should be informed about the range of activities that form part of the programme or curriculum. It should be explained that parents will be kept informed about the general plans for Routine and Expected visits, but that they will not necessarily be informed every time their child goes off-site.

Most establishments will have agreed with participants and parents the need for adequate outdoor clothing and footwear to be provided for all year round off-site activity as a normal part of everyday experience.

For any visit which cannot be classified as Routine and Expected, parents must have been appropriately informed, in order that they will know where participants will be, and have prepared them for the experience.

Further guidance on providing information to parents can be found within the relevant visit section.



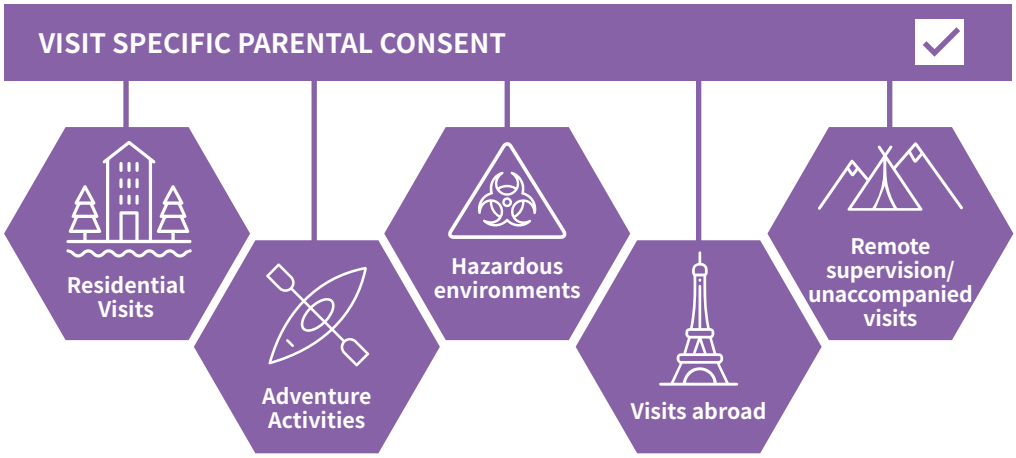
4.5 Parental Consent and Medical Information

A summary of visit types, with recommendations regarding parental consent and medical information, can be found in the matrix on Visit Approval, Medical Information and Parental Consent within the **Toolkits section** of the website.

The majority of off-site visits are a normal part of educational and other service provision and within this guidance are referred to as 'Routine and Expected Visits'. For this category of trip the process of gaining consent and informing parents should be kept as simple as possible and must not be restrictive. Recommendations for good practice can be found within **Section 8 'Routine and Expected Visits'**.

Visit specific parental consent is usually only requested for activities or visits that involve a higher level of safety management. These include:

- Residential Visits
- Adventure Activities
- Environments with specific planning considerations
- Visits abroad
- Remote supervision or unaccompanied visits



A summary of visit types, with recommendations regarding parental consent and medical information, can be found in the matrix on Visit Approval, Medical Information and Parental Consent within the Toolkits section of the website

Recommendations for good practice can be found within the relevant visit section and sample consent forms for these different types of activities and visits can be found in the toolkits

It is recommended that for more complex visits parents are asked to provide an update on any medical issues as part of the trip specific consent

4.6 Preparing Participants



It is good practice to prepare participants so that they understand the aims and nature of the visit. Risk Education is an important aspect of young people's development and participants should take part in planning, implementing and evaluating their own contribution to visits where possible. The benefits of **involving children and young people in the planning process** can be found in the **Toolkit.**.

Risk Education is an important aspect of young people's development

Participants should take part in planning, implementing and evaluating their own contribution to visits where possible

Consideration should be given to ensuring that participants understand:

- The nature and demands of the visit
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times and not just during activities
- What to do in the event of an accident/incident
- Their role in ensuring the safety of all participants
- The Code of Conduct (if there is one)

4.7 Supervision

All adults who are in a supervisory role have a duty of care for the group at all times. There is no break from this responsibility during the trip

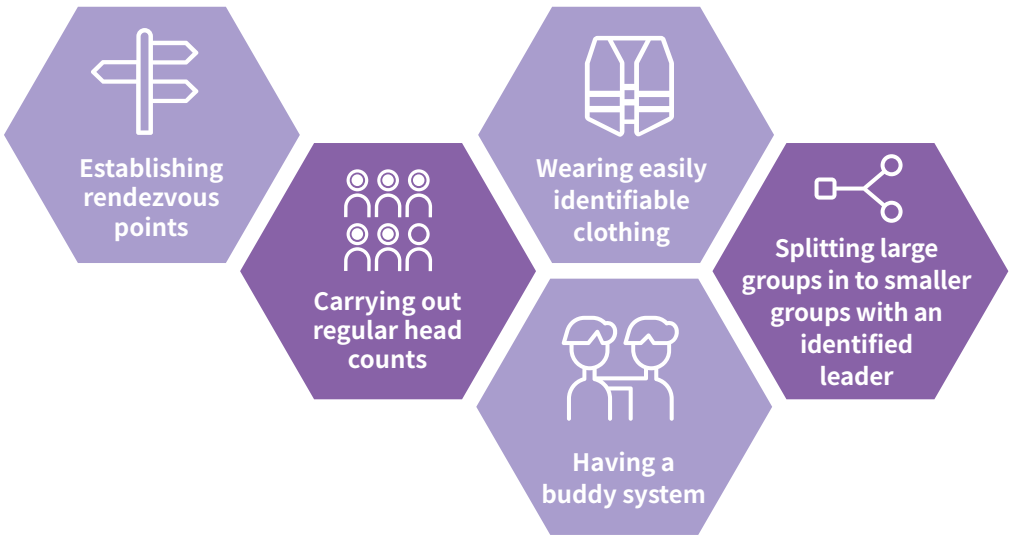
The Visit Leader has overall responsibility for supervision during a trip. Breaks from this responsibility during the visit need to be clearly identified, with clear handover arrangements, and co-ordinated by the Visit Leader. All adults who are in a supervisory role have a duty of care for the group at all times. There is no break from this responsibility during the trip.

There are numerous methods of supervising groups and examples can be found within the Toolkits section but general consideration should be given to the following:

- Establishing rendezvous points
- Carrying out regular head counts
- Wearing easily identifiable clothing*
- Having a buddy system
- Splitting large groups into smaller groups with an identified leader

The risk assessment process should identify suitable levels and methods of supervision. Consideration should be given to keeping parents informed about the supervision arrangements.

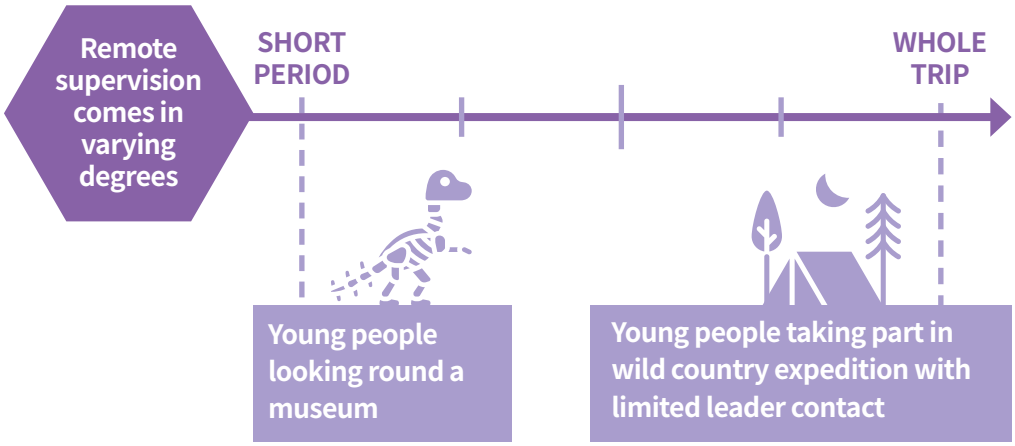
There may be times during a visit where the participants come under the care of a third party (e.g. a coach driver or outdoor instructor). In these circumstances, however, it must be realised that the Visit Leader still retains ultimate responsibility. If any concerns arise, the Visit Leader should discuss them directly with the third party in the first instance and then withdraw the group from the care of the third party if the problems are not resolved.



* The advantages of wearing easily identifiable group clothing (hoodies, caps, backpacks etc.) need to be measured against the risks associated with being a potentially high profile target group for a terrorist attack (see **Section 4.17** for further information).

4.8 Remote Supervision

Remote supervision is the term used when the leader is not directly present with participants. Remote supervision comes in varying degrees and is used in a variety of circumstances. In its simplest form participants may be given time to look round a museum on their own; at the other end of the spectrum, young people may take part in wild country expeditions where they have limited contact with their leaders for long periods of time.



Visit Leaders remain responsible for participants even when not in direct contact with them

Working without immediate supervision can help learners to develop independence and self-reliance. When such activity is planned the Visit Leader must be confident that learners have the appropriate skills to operate without undue risk. Training and briefing should reflect this.



Visit Leaders remain responsible for participants even when not in direct contact with them. They should not underestimate the challenges of remote supervision. It requires extra planning and contingencies to be put in place. This should be reflected in the Visit Plan.

4.9 Unaccompanied Visits



Careful thought should be given to why an unaccompanied visit is deemed to be appropriate

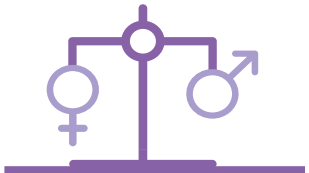
There may be occasions when young people take part in visits without any accompanying leader for the entire trip. Before such visits are considered, careful thought should be given to why this is deemed to be appropriate.

It may be considered that such a visit is appropriate in the following circumstances:

- It will benefit the participant's personal development
- It is part of a planned programme to reach an agreed outcome
- The proposed participants are of an age commensurate with the level of self-reliance required
- The proposed participants are assessed to have previously displayed appropriate behaviour
- The proposed participants have been fully briefed with regard to what to do in the event of delays, missed transport links, incidents or accidents etc.
- The proposed participants have been allocated a 24/7 emergency contact support person from the organising establishment
- The proposed participants have received skills training that is appropriate to the level of self-reliance required

4.10 Exploratory Visit

A Visit Leader needs to be confident that the location and facilities are suitable for their plans. In most cases this will have involve a prior visit. However, in consultation with the Head of Establishment, an experienced Visit Leader with good reasons to be confident in their own judgement may decide to use a location that has not been previously visited.



With a mixed gender group it is preferable to have a gender mix of leaders

4.11 Gender of Accompanying Staff

With a mixed gender group it is preferable to have a gender mix of leaders. However there are many circumstances where this is not possible or essential. Consideration of this issue should be part of the risk assessment process. Parents should be informed of and have given consent to the staffing arrangements.

4.12 Vetting Accompanying Adults

Parents and other volunteers are often an essential part of supervision ratios. When they assist on visits they are called 'accompanying adults'.

The main decision that has to be made is whether an accompanying adult needs to be vetted.

The essential factor in this decision is whether the accompanying adult is doing 'regulated work'. This term is explained in Chapter 2 of the Disclosure Scotland guidance under 'Protection of Vulnerable Groups' (PVG).[6] If an accompanying adult is carrying out regulated roles then they must be vetted.

There is a five step assessment process in order to determine whether or not someone is doing regulated work. This five step process must be applied in all cases.

There are some worked examples within the **Toolkits section** of the website.

There are some worked examples in within the Toolkits section of the website

Where an application to join the PVG Scheme is not required, a basic disclosure could be used instead. Visit Leaders should know and follow their Employer's child protection arrangement in these matters.

4.13 Using an External Provider

The term 'external provider' can include museums, local farms, activity providers, residential centres, tour operators, expedition providers etc.

Good communication with any external provider is essential to ensure that the visit matches expectations and runs according to plan. The following steps can assist with this process.

In the planning stage the Visit Leader should consider:

- Using a reputable provider
- Liaising with the provider to discuss the aims and the needs of the group
- Establishing whether the provider requires to be vetted (see **Section 4.12**)
- Checking adequate insurance is in place (see **Section 7**)

[6] https://www.mygov.scot/pvg-scheme/

Prior to the visit the Visit Leader should consider:

- Liaising with the provider in order to find out what is expected of them or their party (e.g. where to go, what to bring, etc.)
- Providing any relevant information to the provider such as the group's age-range, relevant medical conditions, additional support needs, competence
- Confirming whether risk assessments are in place
- Compliance with Local Authority or Employer child protection policy

The Visit Leader retains ultimate responsibility for participants at all times during off-site visits, even when the group is under instruction by staff from the provider

The Visit Leader retains ultimate responsibility for participants at all times during off-site visits, even when the group is under instruction by staff from the provider. Visit Leaders should remember that they are still expected to act as a normal caring parent, and must raise any concerns about the activity with any third party providers.

Additional information regarding providers of transport can be found in **Section 6**.

Additional information regarding providers of adventure activities can be found in **Section 12**.

If using specialised service providers such as tour operators and expedition providers, more detailed information can be sought through the Local Authority[7] or Employer.

4.14 Inclusion

How inclusive is the trip?



Can adjustments be made or are there alternatives to make the visit more inclusive?

Where it is reasonably practicable all children should be able to access the opportunity to participate in off-site visits. Visit Leaders should be aware of and follow their Employer's equality and inclusion arrangements.

An establishment or organisation is less likely to discriminate if it plans a trip considering the need to include all participants irrespective of their protected characteristics rather than if it arranges a trip and then tries to adapt it to make it inclusive.

In the early planning stages, it is important to consider how accessible any trip is in terms of cost, venue, activities etc. Whilst it is not necessary for every participant to be able to take part in every activity, it is necessary to make reasonable adjustments and consider alternatives to make the visit more inclusive.

In some circumstances, additional staff may be required to allow an individual to participate – this needs to be taken into account in the early planning stages when considering staffing and costs and must not be an additional cost as a result of any individual choosing to participate.

[7] https://sapoe.org.uk/our-members/

Additional staff may be required to allow an individual to participate – this needs to be taken into account in the planning stages



Guidance on supporting transgender young people, including considerations for day and residential visits can be found in **Supporting Transgender Pupils In Schools: Guidance for Scottish Schools**.

There may be unforeseen issues which arise in the run up to a trip which have not been apparent in the early planning stages. Examples of this include mental health, gender/sexuality, medical conditions etc. Reasonable steps should be taken to ensure that individuals can participate but each situation will be different and require a different solution. Involving young people and their parents/carers in any decision making is essential. Case studies are included in the toolkit.

In rare circumstances it may be required to withdraw an individual from a trip where the risks of participation outweigh the benefits. This decision should be reached in consultation with the young person, parents/carers and the Technical Advisor and only where it is not possible to make reasonable adjustments.

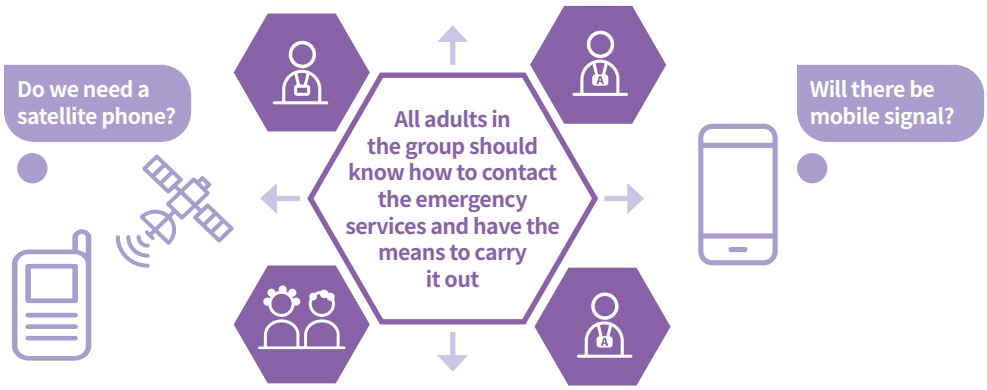
4.15 First Aid

Access to first aid[8] should form part of the Visit Plan.

A suitably stocked first aid kit should be taken on all visits

For many everyday activities, there is no need for a qualified first aider as there is easy access to professional help and other staff who have been first aid trained. If difficulties in accessing professional help are anticipated then further consideration is required. For specific information on how this is applied in your Local Authority[9] or organisation contact your Technical Advisor. A suitably stocked first aid kit[10] should be taken on all visits.

All adults in the group should know how to contact the emergency services and have the means to carry it out. They should be aware of the limitations of mobile phones in remote locations.



[8] http://www.hse.gov.uk/firstaid/
[9] https://sapoe.org.uk/our-members/
[10] http://www.hse.gov.uk/firstaid/faqs.htm#first-aid-box



4.16 Electronic Equipment

Electronic devices can, on occasion, be of benefit to an excursion. However, electronic devices can also be a hindrance. It is therefore important that the establishment or organisation has clear guidance on the use, or not, of electronic equipment, such as smartphones, tablets, smartwatches or action cameras. The safeguarding of all participants is paramount and guidance for participants and parents needs to reflect the importance of this.



Consideration should be given to the following:

- What are the benefits vs risks? How can the risks be reduced?
- If electronics are allowed, what are the set parameters? How are the rules and consequences clearly communicated in advance to parents and all participants?
- If electronic devices are only to be used during supervised times, how will this be managed safely and securely?
- If photos and videos are allowed, has consent, from all participants been obtained? If any individual has not given consent, how will this be managed?
- Is specific guidance on use of action cameras required? Continual videoing may knowingly or unknowingly, compromise the safeguarding of both user and participant.
- Does the trip insurance cover electronic equipment? If not, how is this clearly communicated to parents/carers in advance?
- Risks and benefits of use of electronic devices in relation to an accident/ incident (see **Section 14.5**)

4.17 Security and Terrorism

With increasing terrorism-related incidents, both within the UK and overseas, it is important to consider how to minimise risk and to ensure that in the event of an incident all participants know what actions to take.

Consideration should be given to:

- Location and venues to be visited - could the visit's aims be fulfilled without visiting a high risk location?
- Use of public transport - if this is an integral part of the experience could this be done outside peak periods?
- Procedures for what to do in the event of a security alert/incident/ evacuation of a venue, etc. - these should be discussed and agreed with all participants.
- Protocol for use of electronic devices - clear guidance around use of electronic devices if caught up in an accident/incident should be agreed, to minimise the likelihood of unnecessary stress and anxiety for parents.
- Informing participants and parents that if they choose not to travel due to concerns about safety and security that unless the Government has advised against travel, they will not be entitled to a refund.

Visit Leaders should regularly consult the UK Government webpage on 'Terrorism and national emergencies'[11] and the Foreign, Commonwealth & Development Office[12] (FCDO) web pages for up to date information regarding terrorism threats in the location to be visited and if required alter plans to reduce risks.

[11] https://www.gov.uk/terrorism-national-emergency
[12] https://www.gov.uk/guidance/reduce-your-risk-from-terrorism-while-abroad



5. Risk Assessment

5.1 Introduction

5.2 Preparing Risk Assessments

5.3 Dynamic Risk Assessment

5.4 Using an External Provider

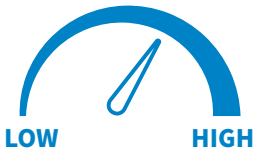
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5.1 Introduction

Risk assessments are an important aspect of planning any off-site visit. They provide evidence that the risks, and benefits, have been considered and that adequate and proportionate control measures are in place. Visit Leaders should view the risk assessment process as a valuable element of their planning and ensure that where possible it involves all participants.

Risk assessment should focus on significant and foreseeable risks, rather than on those that are trivial or the result of over-protectiveness. Exposure to real risks should be offset against the benefits of undertaking the visit. It does not require the use of technical formulae, and professional health and safety expertise should only be needed in the more complex or specialist cases.



The employer has a legal responsibility to ensure risk assessments are in place for off-site visits

And to have a system that ensures these are being implemented

5.2 Preparing Risk Assessments

Assessing and managing risk is an important aspect of young people's development and involving children and young people in the risk assessment process should be an integral aspect of preparing them for an off-site visit. Having an understanding of the risks, and co-creating relevant control measures with participants, is more likely to result in children and young people complying with those measures. Even the youngest learners can be involved in the risk assessment process – examples of this process can be found in the **Involving children and young people in planning off-site visits Toolkit**.

The Employer has a legal responsibility to ensure risk assessments are in place for off-site visits and to have a system that ensures these are being implemented. It is appropriate for the Employer to provide generic risk assessments, and these could be incorporated into an online recording tool where these are being used.

Generic risk assessments provide a template, providing an overview of the foreseeable risks that might be met on a visit. It is the responsibility of the Visit Leader to use a generic risk assessment and develop it for their specific visit (ideally in partnership with participants) to ensure that it is relevant - with the aim of managing risks so that they are acceptable. In general, 'acceptable' would be free from significant risk of death or permanently disabling injury. 13

[13] https://www.hse.gov.uk/simple-health-safety/risk/index.htm

Leaders should use a generic risk assessment as a starting point, and add any significant and foreseeable risks specific to their visit. This should take in to account:

- The aims and benefits of the visit
- The participants (including leaders and helpers)
- The venue
- The activity
- Getting there
- Time of year



A range of generic risk assessments and sample specific risk assessments can be found within the Toolkits section of the website

Routine and Expected visits are by their nature low risk activities and should be quick and easy to risk assess. Higher risk activities require more detailed risk assessments which record how the risks will be reduced to an acceptable level.

The findings of the risk assessment and the relevant precautions/controls should be agreed with and understood by all participants including Visit Assistants (and parents where appropriate).

A range of generic risk assessments and sample specific risk assessments can be found within the **Toolkits section** of the website.

5.3 Dynamic Risk Assessment

Despite the best planning, the unexpected may happen during a visit and Visit Leaders have to be prepared to change and adapt as required. Experience and training will enable sound judgements to be made.

The Visit Leader and Visit Assistants should monitor the risks throughout the visit and take appropriate action as necessary. This is called dynamic risk assessment and includes knowing when and how to apply contingency plans where they are needed. It also includes heeding advice and warnings from those with specialist expertise or local knowledge (especially with regard to higher-risk activities).

The actions taken as a result of dynamic risks assessment may be recorded after the visit so that they can inform future planning.



5.4 Using an External Provider

All external providers must have risk assessments in place. Depending on the nature of the visit and activities to be undertaken the Visit Leader needs to consider whether they need sight of these.

All external providers must have risk assessments in place

The Visit Leader needs to consider whether they need sight of these

For example there is no need for Visit Leaders to request copies of risk assessments from external providers such as museums and swimming pools where there is normal public access. There is also no need to request copies of risk assessments from external providers of Adventure Activities where the provider has an AALA licence (see **Section 12.3**). When the Employer is a Local Authority, an approved provider scheme may be in place and if this is the case, there is no need to request copies of risk assessments. However it would be prudent to discuss safety arrangements and precautions with the provider for activities or venues of a less routine nature.

It is not necessary to ask for risk assessments from transport providers.



6. | Transport

6.1 Introduction

6.2 Supervision on Transport

6.3 Hiring Coaches and Buses

6.4 Licences and Permits for Driving Minibuses

6.5 Establishment Minibus

6.6 Private Cars

Contents →

6.1 Introduction

The Visit Leader must give careful thought to planning transport. It is important to ensure that the travel plan is suitable for the age and nature of the participants. Consideration should be given to the following:

- The length, nature and complexity of the journey and implications for supervision etc.
- Selecting the right mode(s) of transport including use of public transport
- Using a reputable transport provider
- Contingency plans
- The time of year and weather
- The needs of any participants with limited mobility



Service providers such as transport operators are all subject to regulation and inspection and Visit Leaders can use them in the same way as any member of the public. There is no requirement to obtain risk assessments from transport providers.

6.2 Supervision on Transport

The Visit Leader is responsible for the party at all times including maintaining good discipline whilst travelling, and during any unsupervised periods (e.g. motorway services, ferries etc.). The level of supervision that is necessary should be considered as part of the risk assessment, taking in to account:

- The age and nature of the participants
- The mode of transport and the implications for supervising participants
- The length, nature and complexity of the journey



When planning transport, consideration should be given to the following:

- Preparing participants for the journey
- The comfort and safety of participants

6.3 Hiring Coaches and Buses



When planning a long journey Visit Leaders should ensure they agree a plan in advance with the company, for driver hours and rest periods

Visit Leaders should consult their Employer's guidance for any specific procedures.

Coaches and buses should be hired from a reputable company. Professional operators of buses and coaches are legally required to be licensed. Compliance with the various legal requirements is their responsibility not the hirer's.

When planning a long journey Visit Leaders should ensure they agree a plan in advance with the company, for driver hours and rest periods.

Visit Leaders are responsible for immediately raising any concerns over driver behaviour (speeding, tiredness, aggressive driving, attitude etc.). If there is no satisfactory resolution consideration has to be given to stopping the journey.

6.4 Licences and Permits for Driving Minibuses

Visit Leaders should refer to their Employer's policy or consult the transport manager if appropriate. Drivers of any vehicle must ensure that they have the correct entitlement on their licence.[14]

[14] https://www.gov.uk/vehicles-can-drive

Some local authorities or Employers allow establishments to apply for a section 19 permit.[15] This permit allows drivers who passed their test after 1997 to drive a minibus under the following conditions:

- The driver must be 21 or over
- The driver must have held a category B (car) licence for at least 2 years
- The driver receives no payment or consideration for driving the vehicle other than out-of-pocket expenses
- The minibus has a Maximum Authorised Mass (MAM) not exceeding 3.5 tonnes (4.25 tonnes including any specialised equipment for the carriage of disabled passengers)

The driver must have the D1 category on their licence for minibuses that have a MAM of over 3.5 tonnes.

With a D1 category a trailer up to 750kg can be towed but a D1+E is required for anything over 750kg MAM. The combined MAM of both trailer and minibus cannot exceed 12 tonnes.



It is advisable for all those who may drive the establishment minibus to receive training in minibus driving and the management of passengers

The Minibus Driver Awareness Scheme (MIDAS) provide training to do this

6.5 Establishment Minibus

The minibus should be properly maintained in accordance with the employer's arrangements.

Although the Head of Establishment is ultimately responsible for the establishment's minibus, the driver is responsible for the vehicle when driving it. The minibus driver must be qualified to drive a minibus and have a valid driving licence (see **Section 6.4**).

It is advisable for all those who may drive the establishment minibus to receive training in minibus driving and the management of passengers such as that provided under the Minibus Driver Awareness Scheme (MIDAS).[16]

The driver should not normally be responsible for supervision. Driver supervision may be sufficient if a small number of participants are being taken on a short journey.

[15] https://www.gov.uk/government/publications/section-19-and-22-permits-not-for-profit-passenger-transport/section-19-and-22-permits-not-for-profit-passenger-transport
[16] https://www.midas-training.org.uk/



If using private cars to transport participants it is essential that parents are informed of the arrangements, to enable them to make an informed decision

6.6 Private Cars

Visit Leaders and others who drive participants in their own car must ensure their passengers' safety in line with legal requirements. This includes:

- Ensuring that front and back passengers wear properly adjusted seat belts
- Having appropriate seating in place for children (including booster seating and seatbelt adjustment devices)
- Ensuring that the vehicle is roadworthy and has a valid MOT
- Ensuring that there is appropriate insurance cover for carrying the participants. This will require cover for business purposes. (Heads of Establishment should check this is in place)

If private cars are being used to transport young people the following points should be considered:

- Parents should be informed of the arrangements, to enable them to make an informed decision
- Drivers should be carefully selected, and vetted if appropriate (**see Section 4.12**)
- It is advisable that the driver is not put in a position where they are alone with a participant
- The Visit Leader should arrange a central dropping point for all participants rather than individual home drop offs



7. | Insurance

7.1 Introduction

7.2 Using an External Provider

7.3 Using a Travel Company

7.4 Information for Parents

Contents →



7.1 Introduction

The Employer should make clear to Heads of Establishments and Visit Leaders the extent of their insurance provision for off-site visits.

The Visit Leader must ensure, well before the group departs, that adequate insurance arrangements are in place covering all planned activities.

It is important to consult the Employer to establish the level of insurance cover that is provided by the Employer's insurer. **This may come in varying levels:**

- Some local authorities or Employers have insurance cover for all participants for all off-site visits
- Some provide cover only for specific activities
- Some provide no cover

It is essential to check the level of insurance cover and any exclusions - this is particularly relevant in regard to terrorism, pandemics, civil unrest and any natural disaster. In many circumstances cancellation as a result of this type of event/ incident will not be covered by insurance.

It is essential that insurance arrangements, and potential financial risk, are clearly communicated to participants and parents/carers to enable an informed decision to be made about participation.

7.2 Using an External Provider

If an off-site trip involves an external provider (e.g. outdoor activity provider, residential centre), the Visit Leader should establish the level of insurance provided by their own Employer in order to determine whether additional insurance is required.

Service providers such as transport operators are all subject to regulation and inspection and Visit Leaders can use them in the same way any member of the public would without the need to check insurance.

The Visit Leader should consult their own Local Authority or Employer to confirm requirements.[17]

[17] https://sapoe.org.uk/our-members/

7.3 Using a Travel Company



If your off-site trip involves a travel company, the Visit Leader should establish the level of insurance provided by their own Employer in order to determine whether additional insurance is required.

If the Employer provides adequate cover, the Visit Leader will not need to obtain additional insurance through the travel company.

If additional cover is required the travel company will be able to advise on insurance requirements. However, the following are examples of points to consider when arranging insurance:

- Are there any exclusions?
- Is liability cover provided?
- Is personal accident cover provided?
- Is there cover for damage to/loss of hired equipment?
- Is there any excess? (The first part of a claim which is not covered – who would pay this?)

The Visit Leader should consult their own Local Authority or Employer to confirm insurance arrangements

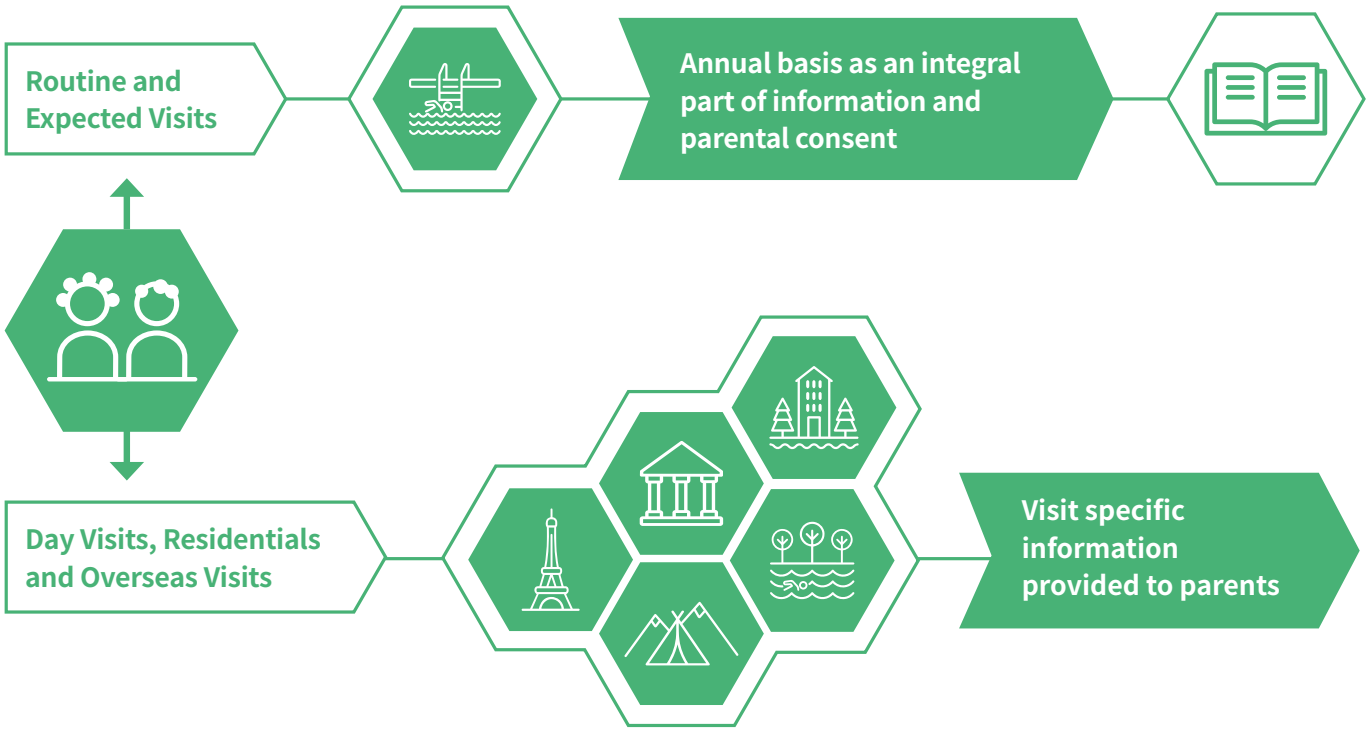
The Visit Leader should consult their own Local Authority or Employer to confirm requirements.[18]

[18] https://sapoe.org.uk/our-members/

7.4 Information for Parents

Parents should be given details of insurance cover.

For Routine and Expected visits this can be done on an annual basis. For other categories of visits, details of the level of insurance cover should be included in the visit specific information provided to parents.



Parents need to be made fully aware of the level of cover and financial risks involved

And be advised about any specific additional cover they may want to arrange

It is important to highlight insurance arrangements should an individual choose to withdraw from a visit. In some circumstances participants and/or parents may decide not to take part and unless the Government is advising against travel this 'disinclination to travel' would not be covered by insurance.

Similarly, cancellation due to terrorism, pandemics, civil unrest and any natural disaster may not be covered by insurance and parents need to be made fully aware of the level of cover and financial risks involved. Parents need to be advised about any specific additional cover they may want to arrange such as loss of personal belongings or cancellation.



8. Routine and Expected Visits

8.1 Introduction

8.2 Approval

8.3 Visit Plans

8.4 Risk Assessment

8.5 Information for Parents / Parental Consent

8.6 First Aid

Contents

8.1 Introduction

The Scottish Government have recognised the need for young people to be regularly involved in outdoor activity and learning. This will involve establishments taking young people off-site.

Many of these off-site visits will be routine, and will become an accepted and expected part of the curriculum. Within this guidance, these types of visits have been termed 'Routine and Expected Visits', so Employers should ensure that the process for running them is simple.



A flowchart for planning and organisation of R&E Visits can be found in the Toolkits section of the website

Routine and Expected visits will generally be to local venues, involve easily managed activities, happen on a regular basis and be completed within the normal session times.

A flowchart for planning and organisation of this category of visit can be found in the **Toolkits section** of the website.

The matrix on Visit Approval, Medical Information and Parental Consent can be found in the Toolkits section of the website

8.2 Approval

Approval for Routine and Expected Visits is the responsibility of the Head of Establishment (see the matrix on Visit Approval, Medical Information and Parental Consent in the **Toolkits section** of the website).

8.3 Visit Plans

There should be a collaborative approach within establishments to develop Visit Plans for the range of venues likely to be used on a regular basis.

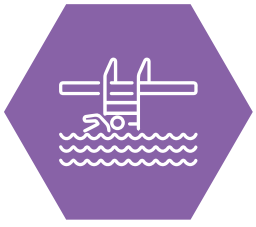
Heads of Establishment should work with staff to develop an agreed approach to travelling on foot, to crossing roads or in the use of transport in their locality. Models of effective practice should also be developed and agreed for responding to local

Sample Visit Plans can be found within the Toolkits section of the website

conditions and events. Approaches to risk education for children and young people should also be developed.

These plans should be reviewed regularly and adapted if required. They should be considered as working documents that are influenced by any incidents or lessons that have been learned. Sample Visit Plans can be found within the **Toolkits section** of the website.

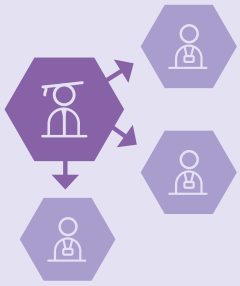
8.4 Risk Assessment



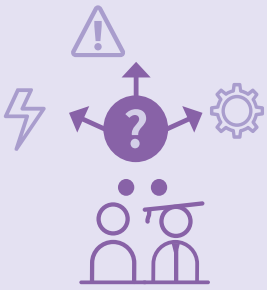
Routine and Expected visits are by their nature low risk activities

Heads of Establishment should work with staff to develop risk assessments for the range of venues likely to be used on a regular basis. Routine and Expected visits are by their nature low risk activities and should be quick and easy to risk assess adopting a common sense approach.

Assessing and managing risk is an important aspect of young people's development and involving children and young people in the risk assessment process should be an integral aspect of preparing them for an off-site visit. Having an understanding of the risks, and co-creating relevant control measures with participants, is more likely to result in children and young people complying with those measures. Even the youngest learners can be involved in the risk assessment process – examples of this process can be found in the Involving children and young people in planning off-site visits **Toolkit**.



Heads of Establishment should work with staff to develop risk assessments for the range of venues



Develop risk assessments for the range of venues likely to be used on a regular basis



Risk assessments should be reviewed on a regular basis

Sample risk assessments can be found within the toolkit

Routine and Expected visits might include venues such as museums and swimming pools. Such external providers are required to carry out a risk assessment of their own premises and activities. They must then implement appropriate measures to ensure that their activities are safe. There is no need for Visit Leaders to request copies of these risk assessments. Sample risk assessments can be found within the **Toolkit**.

8.5 Information for Parents / Parental Consent

Consent for Routine and Expected Visits should be gained at induction or on an annual basis

If a visit requires any specific arrangements then parents should be informed

When children join an establishment or group, parents should be informed about the range of activities that are part of the programme or curriculum. Parents should be advised that they will be informed about the general plans for Routine and Expected visits, but that they will not necessarily be told every time their child goes off-site. Establishments should explain this to parents as part of the induction into the establishment.

Participants and parents should be informed about the need for adequate outdoor clothing and footwear to be available throughout the year to enable Routine and Expected visits to become a normal part of everyday experience.

8.6 First Aid

Heads of Establishment should work with staff to agree the level of first aid provision that is required for a Routine an Expected Visit. The following factors should be considered:

- How quickly medical care can be accessed
- Any known medical needs



Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider. By contrast, if the risk assessment indicates a raised or high level of risk it will be necessary for one or more of the accompanying staff to hold a first aid certificate.



9. One-off Day Visits

9.1 Introduction

9.2 Approval

9.3 Visit Plans

9.4 Risk Assessment

9.5 Information for Parents / Parental Consent

9.6 Emergency Details

9.7 First Aid and Medical Facilities

Contents



9.1 Introduction

Visits which are a one-off experience or which are not 'Routine and Expected' (**see Section 8**) require additional planning considerations.

One-off Day Visits might include an annual trip to a visitor attraction, attending an event, etc. and are more likely to extend beyond the normal session time.

9.2 Approval

See the matrix on Visit Approval, Medical Information and Parental Consent in the Toolkits section of the website

Approval for One-off Day Visits is the responsibility of the Head of Establishment (see the **matrix on Visit** Approval, Medical Information and Parental Consent in the **Toolkits section** of the website).



9.3 Visit Plans

A sample plan can be found within the Toolkits section of the website

The Visit Leader is responsible for completing a Visit Plan for a One-off Day Visit.

The Visit Plan should outline who is to do what, and when. The amount of content and detail in the Visit Plan will be determined by the nature of the trip. The Visit Plan will, as well as keeping everyone safe, help to ensure a successful and meaningful visit by clearly setting out the aims, objectives and benefits of the activities.

A sample plan can be found within the **Toolkits section** of the website.

9.4 Risk Assessment

It is the responsibility of the Visit Leader to prepare a specific risk assessment for a One-off Day Visit.

Assessing and managing risk is an important aspect of young people's development and involving children and young people in the risk assessment process should be an integral aspect of preparing them for an off-site visit. Having an understanding of the risks, and co-creating relevant control measures with participants, is more likely to result in children and young people complying with those measures. Even the youngest learners can be involved in the risk assessment process – examples of this process can be found in the **Involving children and young people in planning off-site visits Toolkit.**

Visit Leaders are responsible for recording significant and foreseeable risks specific to their visit. This should take into account:

- The participants (including leaders and helpers)
- The venue
- The activity
- Time of year
- Getting there



A sample plan can be found within the Toolkits section of the website

The findings of the risk assessment and the relevant precautions/controls should be agreed with and understood by all participants including Visit Assistants (and parents where appropriate).

A One-off Day Visit is likely to involve going to visitor attractions such as museums, zoos etc. Such external providers are required to carry out a risk assessment of their own premises and activities. They must then implement appropriate measures to ensure that their activities are safe. There is no need for Visit Leaders to request copies of these risk assessments.

Sample risk assessments can be found within the **Toolkits section** of the website.

9.5 Information for Parents / Parental Consent

It is recommended that parental consent for the majority of off-site visits is gained at induction or annually. This can include One-off Day Visits

For One-off Day Visits specific information has to be provided to parents and should include:

- The aims and benefits
- The activity and its learning objectives
- The venue
- Travel arrangements
- Insurance cover
- Supervision arrangements

See matrix on Visit Approval, Medical Information and Parental Consent in the Toolkits section of the website

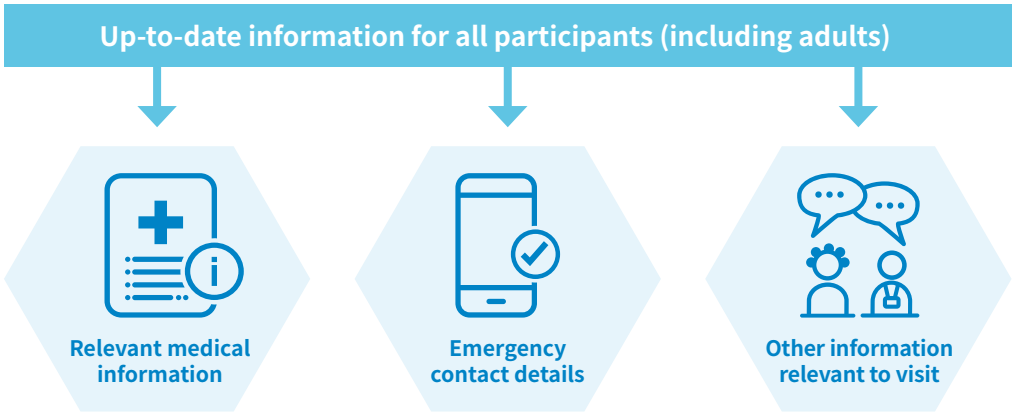
It is recommended that parental consent for the majority of off-site visits is gained at induction or annually. This can include One-off Day Visits.

The exceptions to this are One-off Day visits that include adventure activities or visits to environments that have specific planning considerations (see **Section 13**). On these occasions specific trip parental consent has to be obtained and this should include a request for up to date medical information which may have an impact on the visit (see matrix on Visit Approval, Medical Information and Parental Consent in the **Toolkits.**

9.6 Emergency Details

Visit Leaders should ensure that they carry the following up-to-date information for all participants (including accompanying adults):

- Relevant medical information
- Emergency contact details
- Any other information relevant to the specific visit



This can be obtained from the annually updated information provided to schools.

For One-off Day visits which include outdoor activities or venues with specific considerations it may be appropriate to ask parents for up to date information which may have an impact on the visit (e.g. fear of heights, allergies to animals etc.).

9.7 First Aid and Medical Facilities



There are different levels of first aid training and qualification. Visit Leaders should consult their Local Authority or Employer to establish the level of first aid requirement

Heads of Establishment and Visit Leaders need to take the following factors into account when deciding the level of first aid provision that is required on a One-off Day visit:

- The type of medical facilities that are available
- How quickly medical care can be accessed
- The aims and objectives of the visit
- The age of the participants
- Any known medical needs

Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider among the accompanying staff. By contrast, if the risk assessment indicates a raised or high level of risk it will necessary for one or more of the accompanying staff to hold a first aid certificate.

It should be noted that there are different levels of first aid training and qualification. Visit Leaders should consult their Local Authority[19] or Employer to establish the level of first aid requirement. This is particularly relevant for higher risk activities.

[19] https://sapoe.org.uk/our-members/



10. | Residential Visits

10.1 Introduction
10.2 Approval
10.3 Visit Plans
10.4 Risk Assessment
10.5 Supervision
10.6 Information for Parents
10.7 Parental Consent
10.8 Preparing Participants
10.9 Points to Consider about Accommodation
10.10 Emergency Details
10.11 First Aid and Medical Facilities

Contents

10.1 Introduction

A residential experience can be an extremely valuable learning opportunity and should be part of the progressive outdoor learning experiences provided for young people.

Residential Visits include any form of overnight stay regardless of the type of accommodation.



10.2 Approval

Residential Visits should be approved by the Head of Establishment before notification to the Employer. Each Local Authority or Employer will have different arrangements for this process and advice should be sought.[20]

10.3 Visit Plans

A sample plan can be found within the Toolkits section of the website

The Visit Leader is responsible for completing a Visit Plan for a Residential Visit.

The Visit Plan should outline who is to do what, and when. The amount of content and detail in the Visit Plan will be determined by the nature of the trip. The Visit Plan will, as well as keeping everyone safe, help to ensure a successful and meaningful visit by clearly setting out the aims, objectives and benefits of the activities.

A sample plan can be found within the **Toolkits section** of the website.

10.4 Risk Assessment

It is the responsibility of the Visit Leader to prepare a specific risk assessment for a Residential Visit.

A residential establishment is required to have risk assessments in place for their own premises. There is no need for Visit Leaders to request copies of these risk assessments.

Assessing and managing risk is an important aspect of young people's development and involving children and young people in the risk assessment process should be an integral aspect of preparing them for an off-site visit. Having an understanding of the risks, and co-creating relevant control measures with participants, is more likely

[20] https://sapoe.org.uk/our-members/

to result in children and young people complying with those measures. Even the youngest learners can be involved in the risk assessment process – examples of this process can be found in the Involving children and young people in planning off-site visits **Toolkit section.**

Visit Leaders are responsible for recording significant and foreseeable risks specific to their visit. This should take into account:

- The participants (including leaders and helpers)
- The venue
- The accommodation (in terms of how it affects the group)
- The activity
- Getting there
- Time of year



The findings of the risk assessment and the relevant precautions / controls, should be agreed and understood by all participants including. Visit Assistants (and parents where appropriate).

Sample risk assessments can be found within the Toolkits section of the website

As part of the risk assessment careful consideration has to be given to establishing leader : participant ratios. Various factors could affect the ratios during a visit such as staff or participant illness, or the need to provide 1:1 supervision. It is the responsibility of the Head of Establishment and Visit Leader to ensure that adequate levels of supervision can be maintained in these circumstances. **Sample risk assessments** can be found within the **Toolkits section** of the website.

10.5 Supervision

A supervision rota ensures that it is clear at all times who has supervisory responsibility

This should be co-ordinated by the Visit Leader

Residential Visits entail additional requirements for supervision. Consideration has to be given to the following:

- Establishing ratios (taking into account the need to provide 24 hour responsibility)
- Gender of the accompanying staff
- Vetting accompanying adults
- Periods of remote supervision

Further information can be found on these points in **Section 4**.

Supervision during a Residential Visit will require a range of supervisory techniques. Heads of Establishment should ensure Visit Leaders have sufficient knowledge and experience to carry out the very varied role that Residential Visits demand.

The Visit Leader and accompanying staff should allow sufficient time in the planning stage to discuss the supervision arrangements. Consideration should be given to a supervision rota, with identified hand-over arrangements, to ensure that it is clear at all times who has supervisory responsibility. This should be co-ordinated by the Visit Leader.



10.6 Information for Parents

For Residential Visits specific information has to be provided in writing to parents and should include:

- The activities and the learning objectives
- The venue
- Domestic and sleeping arrangements
- Medical provision
- Supervision arrangements
- Travel arrangements
- Insurance cover
- Behaviour code

Residential Visits require specific information to be provided to parents in writing and consideration should be given to holding a parental information meeting

In addition to written information Heads of Establishment and Visit Leaders should consider holding a meeting where these points can be discussed. The nature of the visit, the age and experience of the participants and the length of visit will affect this decision.

Communication with parents should include making them aware of procedures for dealing with misbehaviour or behaviour that gives Visit Leaders cause for concern.

10.7 Parental Consent

Parental consent has to be obtained for a Residential Visit. Detailed information has to be provided regarding the visit (see **Section 10.5**) to enable parents to give informed consent.



A sample consent letter can be found in the Toolkits section of the website

As part of the consent form parents should be made aware of, and agree to, the procedures for dealing with misbehaviour. A **sample consent letter** can be found in the **Toolkits section** of the website.

In addition up-to-date emergency information should be requested (see **Section 10.10**).

10.8 Preparing Participants

It is particularly important for a Residential Visit to ensure that participants are adequately prepared. Sufficient time should be given to enable participants to be informed and hold discussion about:

- The aims and benefits of the visit
- The nature and demands of the visit
- The domestic and sleeping arrangements
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times and the subsequent sanctions
- What to do in the event of an accident/incident
- The individual's role in ensuring the safety of all participants

Advice and examples for involving children and young people in planning visits can be found in the **Toolkit section**.



It is important for a Residential Visit that participants are adequately prepared and sufficient time should be given to this

If for any reason a participant has to return home early, participants, parents and accompanying staff should agree in advance how this will be carried out and who will meet the cost.

10.9 Points to Consider about Accommodation



The planning stage

In the planning stage the Visit Leader should consider whether the accommodation:

- Fits with the aims and objectives of the visit
- Suits the needs and requirements of all participants (including disabled access)
- Is suitable for the gender mix of the group taking into account any protected characteristics
- Provides adequate security and privacy for all participants
- Complies with appropriate safety standards for the nature of the visit

Additional useful information can be found on the Scottish Government website[21] and the UK Government website.[22]

Prior to the visit

Prior to the visit the Visit Leader should if possible / appropriate:

- Make a prior visit
- Obtain a floor plan showing the location of the group's rooms. Ideally the rooms should be close together with the leaders' quarters located to enable adequate supervision
- Allocate rooms to participants

[21] https://www.gov.scot/policies/lgbti/
[22] https://www.gov.uk/discrimination-your-rights



On Arrival

On arrival the Visit Leader should:

- Carry out a fire drill as soon as possible to ensure all participants are aware of the lay-out of the accommodation and its fire precautions/exits
- Check the accommodation to ensure it is safe and fit for purpose Check for any potential hazards (balconies, electrical connections, access to other rooms etc.) and if necessary establish control measures to deal with these. Where the hazards are extreme or cannot be managed adequately consideration has to be given to insisting on alternative accommodation
- Ensure all participants are aware of the system to ensure their overnight security
- Ensure participants are aware how to obtain assistance if required during the night

10.10 Emergency Details

On a Residential Visit it is important that the Visit Leader has adequate knowledge and information about participants to ensure their well-being. Parents should be given the opportunity to pass on relevant information on the consent form and by more informal approaches.

The Visit Leader should ensure that they carry up-to-date information for all participants (including accompanying adults) on the following:

- Relevant medical information
- Emergency contact details
- Any other information relevant to the specific visit

It is essential that this information is shared with accompanying adults, and external providers, where appropriate.

For Residential Visits which include outdoor activities or venues with specific considerations, it may be appropriate to ask parents for information which may have an impact on the visit (e.g. fear of heights, allergies to animals etc.).

10.11 First Aid and Medical Facilities

The aims and objectives of the visit can influence the degree of risk that parents and participants will find acceptable. For example parents of a primary aged pupil going on a Residential Visit could reasonably expect similar access to medical care as their child would have at home. By contrast, the parents of an older child taking part in an unaccompanied walking expedition in a remote area would accept that access to medical care is limited.

When considering the location of a Residential Visit it is an important part of the risk assessment to consider:

- The type of medical facilities that are available
- How quickly medical care can be accessed
- The aims and objectives of the visit
- The age of the participants
- Any known medical needs

Consult your Local Authority or Employer to establish the level of first aid requirement. This is particularly relevant for higher risk activities

Heads of Establishment and Visit Leaders need to take these factors into account when deciding the level of first aid provision that is required. Where the risk assessment determines the risk is low, it may not be necessary to provide a trained first aider among the accompanying staff. By contrast, if the risk assessment indicates a raised or high level of risk it will necessary for one or more of the accompanying staff to hold a first aid certificate.

It should be noted that there are different levels of first aid training and qualification. Visit Leaders should consult their Local Authority[23] or Employer to establish the level of first aid requirement. This is particularly relevant for higher risk activities.

[23] https://sapoe.org.uk/our-members/



11. | Overseas Visits

11.1 Introduction

11.2 Approval

11.3 Visit Plans

11.4 Risk Assessment

11.5 Establishing Ratios

11.6 Information for Parents

11.7 Parental Consent

11.8 Alternative activities / changes to plans

11.9 Preparing Participants

11.10 Transport

11.11 Accommodation

11.12 Adventure Activities

11.13 Food and drinking water

11.14 Language and local customs

11.15 Weather, climate and clothing

11.16 Currency and contingency funds

11.17 Communication

11.18 Emergency Details

11.19 First Aid and Medical Facilities

11.20 Natural Water Swimming Activities

11.21 Unsupervised Swimming Pools and Pools Abroad

11.22 Exchange visits and Home-stays

Contents →



11.1 Introduction

Overseas Visits include all visits outside the UK. They are almost certain to include a residential element, and are likely to involve other activities which are of a sporting, cultural, or adventurous nature.

Visiting other countries is one of the best ways of gaining a fuller understanding of one's place in the world, and offers a chance to explore the culture, challenges and opportunities that exist in our countries.

Overseas Visits should be seen as a progression after learning about our own local environment, other regions of Scotland, and the UK. The key benefits of educational visits to other countries are more likely to be achieved by older pupils and young adults.

Each visit overseas will require careful planning, realistic budgeting, and a thorough appreciation of the self-reliance and judgement needed when operating outside the UK. Therefore it is likely that leaders will have had considerable experience of organising visits within the UK before leading visits overseas, especially to developing countries. Advice from Employers should be sought regarding local arrangements.

Leaders should have had considerable experience of organising visits within the UK before leading visits overseas



The Foreign, Commonwealth and Development Office (FCDO) website provides current advice regarding disease, civil unrest and terrorism threats

The standard of Health and Safety applying to Overseas Visits, regardless of location, activity or event, should strive to reflect that of the UK wherever possible. Where it is not possible to guarantee parity of standards, such as fire safety in accommodation, every effort should be made to mitigate or manage the exposure to risk. Parents and participants should be informed about any differences in standards that are anticipated.

The dangers of disease, civil unrest and terrorism can be checked out early on in the planning process through the Foreign, Commonwealth and Development Office (FCDO) Travel Advice website.[24] However, there are constant changes to the levels of risk and the countries and areas they relate to, so this is something that needs to be revisited regularly prior to departure.

11.2 Approval

Prior consent in principle from the Head of Establishment, and Employer if appropriate, should be obtained prior to making any commitment to young people, parents or third parties. This will require both the Head of Establishment and the Employer to be satisfied that all necessary planning and preparation are in place before approving the visit.

Overseas Visits must comply with the Employer's policy regarding taking young people outside the UK and advice should be sought in the early planning stage.

Head of Establishment and the Employer need to be satisfied that all necessary planning and preparation are in place before approving the visit



[24] www.gov.uk/foreign-travel-advice



Sample Visit Plans can be found in the toolkit

11.3 Visit Plans

Comprehensive planning and preparation is the most important aspect in ensuring a successful visit. The Visit Leader is responsible for compiling a Visit Plan which documents all aspects of the trip – the amount of detail will be determined by the nature of the trip. **Sample Visit Plans** can be found in the **Toolkits section**.

The early planning process should consider the following:



Prior to the visit the Visit Leader should if possible / appropriate:

The Visit Plan should outline the aims, objectives and benefits of the visit and provide evidence that the purpose of the visit is compatible with the competences of the Leadership Team and the age and experience of participants.



Using a tour operator

If a tour operator or specialist provider is being used, it is important that they have the appropriate industry accreditation:

- ABTA[25]
- ATOL[26]
- EPA[27]
- STF25 and BS8848[28] and BS8848[29]

In addition it is important to seek references from other groups that have used a provider.



Location and Environment

It is essential that the location and environment to be visited have been researched thoroughly. This can be done through:

- Prior knowledge from previous visits
- Contacting other organisations that have visited the location recently
- Researching guidance provided by the Foreign, Commonwealth and Development Office (FCDO),[30] and organisations such as the British Council or Embassies[31]

[25] https://www.abta.com/industry-zone/reports-and-publications
[26] https://www.caa.co.uk/atol-protection
[27] http://www.expeditionprovidersassociation.co.uk/
[28] http://www.schooltravelforum.com/
[29] https://knowledge.bsigroup.com/products/specification-for-the-provision-of-visits-fieldwork-expeditions-and-adventurous-activities-outside-the-united-kingdom-1?version=standard
[30] https://www.gov.uk/foreign-travel-advice
[31] https://www.gov.uk/government/world/organisations

Financial Viability

At the planning stage an accurate costing must be established and a realistic decision made regarding the viability of the proposed visit. Where contributions are expected from parents the information provided must be transparent and realistic, and should include hidden costs such as spending money, visas, inoculations, and additional activities and entrance fees. Contingency monies should be built into the budget for potential emergencies or unseen expenditures.

If fundraising activities are to contribute to financing the trip, the commitment required from participants has to be made clear from the outset. If support is being sought from external sources (grants, sponsorship etc.) this should be secured before proceeding, to avoid unexpected costs once a commitment from parents/participants has been made. Parents must also be made aware of any payment plans and the consequences of withdrawing from the visit once initial payments have been made.

Passport and Visa Requirements

Visit Leaders must check the requirements and restrictions on passports, visas and participants' nationalities at an early stage in the planning process.[32]

Inclusion

Where it is reasonably practicable all children should be able to access the opportunity to participate in Overseas Visits. Visit Leaders should be aware of, and follow their Employer's equality and inclusion arrangements.

A school is less likely to discriminate if it plans a trip taking into account the need to include all pupils irrespective of their protected characteristics rather than if it arranges a trip and then tries to adapt it to make it inclusive.

It is important to consider how accessible any trip is in terms of cost, venue, activities etc. Whilst it is not necessary for every participant to be able to take part in every activity it is necessary to make reasonable adjustments and consider alternatives to make the visit more inclusive.

In some circumstances additional staff may be required to allow an individual to participate – this needs to be taken into account in the early planning stages when considering staffing and costs and must not be an additional cost as a result of any individual choosing to participate.

[32] https://www.gov.uk/browse/abroad/passports

Insurance

There may be a range of insurance options available however it is important to check with the LA Technical Adviser in the early planning stage to check whether the LA has appropriate insurance cover in place. This should include the following: General Travel Insurance, Public Liability, Third Party Insurance and Medical, Evacuation and Repatriation Insurance.

Where a LA has comprehensive insurance cover in place, additional insurance offered by a tour company is not necessary. Parents should be made aware of exactly what is and isn't covered by insurance.

Accommodation

In the planning stage the Visit Leader should investigate the availability and suitability of accommodation either through research or by contacting a tour operator. Be aware that standards in some countries are very different to those found in Western Europe and North America.

The Visit Leader should consider whether the accommodation:

- Fits with the aims and objectives of the visit
- Suits the needs and requirements of all participants (including disabled access)
- Is suitable for the gender mix of the group
- Provides adequate security and privacy for all participants
- Has easy access to toilets and washing facilities
- Complies with appropriate safety standards for the nature of the visit

Further information about checks that should be made in the planning stage and on arrival at a venue can be found in **Section 11.11**.

Health

In the early planning stages and prior to departure it is important to:

- Check for pre-existing medical conditions of staff and participants
- Research the medical provision available at the location
- Check requirements for vaccinations, testing and preventative medication
- Explore how medical assistance will be accessed and paid for

Further advice is available from the NHS fitfortravel website.[33]

[33] https://www.nhsinform.scot/healthy-living/travel-health/travel-health-and-vaccinations/

Personal safety

There are countries and areas in the world that are not suitable for LA led visits because it could expose participants to unacceptable risks. This can be a fluid and sometimes rapidly changing situation and thorough research has to be done at all stages of the planning process leading up to departure. Heads of Establishment and Visit Leaders have to be confident, that in visiting a particular area of the world, that the risks do not outweigh the benefits.

Participants should be made aware of their responsibilities in terms of keeping themselves and other group members safe. Further details can be found in 11.9 – Preparing Participants.

11.4 Risk Assessment

Visit leaders need to prepare a specific risk assessment for all aspects of an Overseas Visit

Tour operators are responsible for risk assessing the aspects of the trip for which they are responsible. Visit Leaders should check that risk assessments are in place

It is the responsibility of the Visit Leader to prepare a specific risk assessment for all aspects of an Overseas Visit for which they are taking direct responsibility. It is very difficult to do this without a pre-visit, or comprehensive researching of any relevant information available from: travel agents, tour operators, the Foreign, Commonwealth and Development Office, Embassies, The British Council, or from other leaders who have undertaken similar trips.

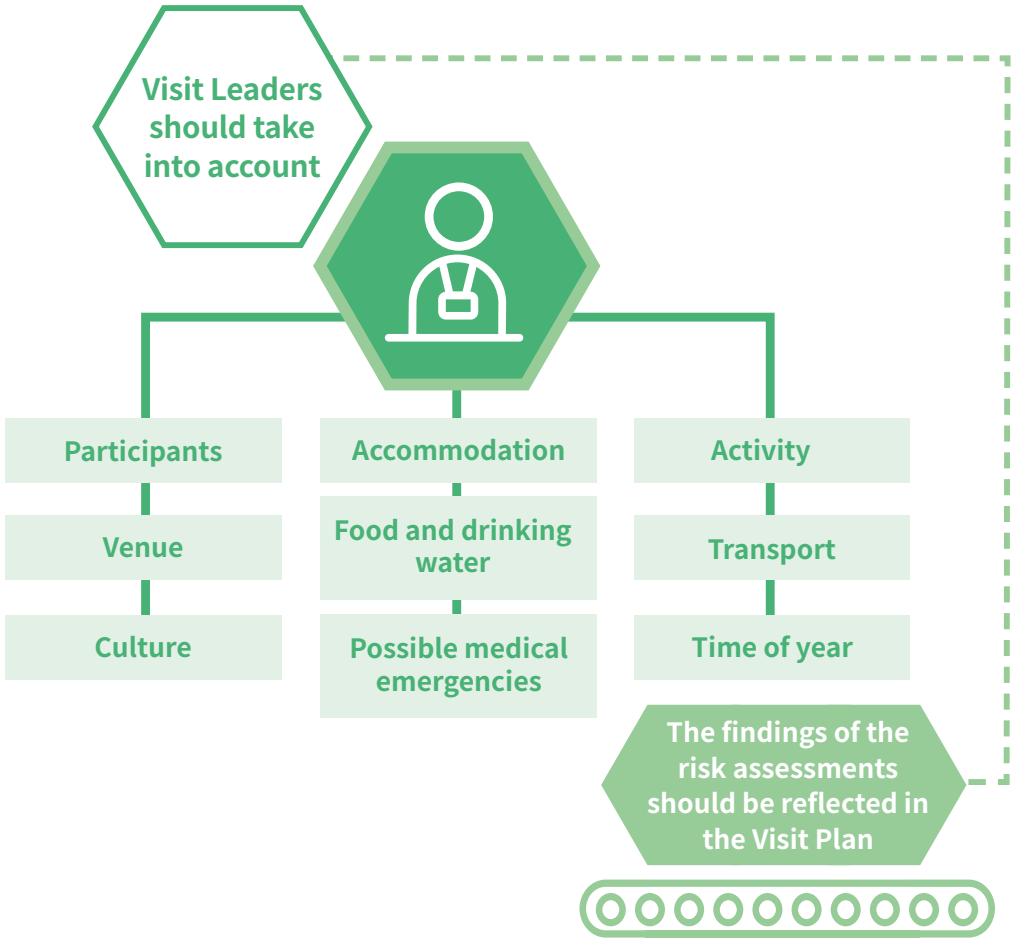
Tour operators are responsible for risk assessing the aspects of the trip for which they are responsible. Visit Leaders should check that risk assessments are in place.

Visit Leaders are responsible for recording significant and foreseeable risks specific to their visit. This process should where possible involve accompanying adults and participants.

Assessing and managing risk is an important aspect of young people's development and involving children and young people in the risk assessment process should be an integral aspect of preparing them for an off-site visit. Having an understanding of the risks, and co-creating relevant control measures with participants, is more likely to result in children and young people complying with those measures. Even the youngest learners can be involved in the risk assessment process – examples of this process can be found in the **Involving children and young people in planning off-site visits Toolkit.**

This should take into account:

- The participants (including leaders and helpers)
- The venue
- The culture
- The accommodation (in terms of how it affects the group)
- The food and drinking water
- Possible medical emergencies
- The activity
- Transport (to get there and in-country)
- Time of year



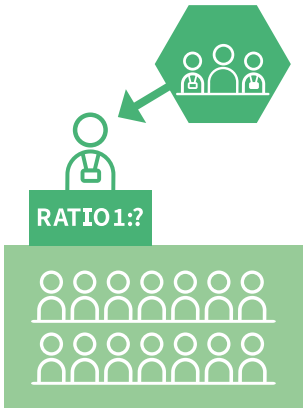
Sample risk assessments can be found within the Toolkits section

The findings of the risk assessment and the relevant precautions/controls, should be agreed and understood by all participants including accompanying adults (and parents where appropriate) and be reflected in the Visit Plan. Sample risk assessments can be found within the **Toolkits section**.

11.5 Establishing Ratios

As part of the risk assessment, careful consideration has to be given to establishing leader to participant ratios. Section 4.3 details the factors that could influence this decision but Overseas Visits may also need to take the following in to account:

- Increased risk of illness (staff and / or participants)
- More complex travel arrangements
- Possible delay in staff on 'stand by' being able to join group
- Inefficient communications systems



It is the responsibility of Heads of Establishment in discussion with Visit Leaders to ensure that adequate levels of supervision can be maintained should any situation arise during the trip which requires the undivided attention of one or more staff.

In some circumstances tour operators provide leaders/guides for the duration of the visit or for specific parts of a visit. Whilst this may influence decisions about ratios, consideration has to be given to the importance of accompanying adults knowing participants.

11.6 Information for Parents

For Overseas Visits the process of informing parents and participants will need to start well in advance of the visit. In some instances this may be one or two years prior to departure. Specific information should be provided in writing to parents including:

- The purpose of the visit
- The proposed itinerary and the learning objectives
- The venue
- The costs
- Passport and visa arrangements
- Domestic and sleeping arrangements
- Health provision
- Supervision arrangements
- Travel arrangements
- Insurance cover
- Behaviour code

Communication with parents is essential in order for them to make an informed decision about participation. A meeting should be held where important points can be discussed

In addition to written information Heads of Establishment and Visit Leaders should hold a meeting/s where these points can be discussed.

Communication with parents should include making them aware of procedures for dealing with misbehaviour, or behaviour that gives Visit Leaders cause for concern, and the financial consequences of their child having to be returned home from an Overseas Visit.

11.7 Parental Consent

Parental consent is a requirement for an Overseas Visit. Provide detailed information and gain consent for itinerary variations (see Section

Parental consent must be obtained for an Overseas Visit. Detailed information must be provided regarding the visit (see **Section 11.6**) to enable parents to give informed consent. It is important to remember that parents are giving consent for the itinerary and activities that they have been informed about. Whilst opportunities may arise to do additional activities once on the visit, care needs to be exercised to ensure that parental consent is not being abused.

As part of the consent form parents should be made aware of/and agree to, the procedures for dealing with unacceptable behaviour. A sample **consent letter** can be found in the **Toolkits section** of the website.

A sample consent letter can be found in the Toolkits section of the website



11.8 Alternative activities / changes to plans

It is important that changes to plans do not vary considerably from what parents have given consent for

Overseas Visits can often bring opportunities to take part in unplanned activities (local festivals, leisure activities etc.) or for plans to have to change. It is important that any changes to plans do not vary considerably from what parents have given consent for, and that you do not take part in unplanned activities which would have required parents to have given informed consent.

11.9 Preparing Participants

It is particularly important for an Overseas Visit to ensure that participants are well prepared. Sufficient time should be given to enable participants to be informed and hold discussion about:

- The aims, objectives and benefits of the visit
- The nature and likely demands of the visit
- The domestic and sleeping arrangements
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times and the subsequent sanctions
- What to do in the event of an accident/incident
- Everybody's role in ensuring the safety of all participants

Advice and examples for involving children and young people in planning visits can be found in the Toolkit

Advice and examples for **involving children and young people in planning visits** can be found in the **Toolkit**.

11.10 Transport

Travel to and from the visit location as well as travel throughout the duration of the visit requires careful planning. **Section 6** provides generic guidance regarding transport but for Overseas Visits the following information should also be considered.



In the developing world this can potentially bring about a host of different challenges concerning travel

Inter-country

Overseas Visits can often include travelling across borders be it by air, train, road or ferry. Within Europe this might not be a major concern but in the developing world this can potentially bring about a host of different challenges. **The following are examples which may require consideration during the planning stage of any Overseas Visit:**

- Health screening when entering other countries
- Visas and passports
- Access to local currency immediately on arrival
- Different baggage allowances
- Different customs allowances and banned items
- Use of cheap local airlines with potentially inflexible tickets
- The security of possessions, especially in terminals and on public transport

In-country transport







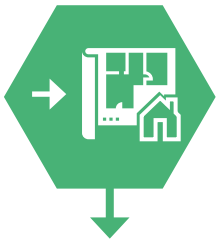
All potential modes of transport have benefits and drawbacks depending on the country and the purpose of the visit. In some countries the safety of participants can be compromised by poor driving standards, badly maintained roads and other road users, and this issue must be outlined to participants and parents to ensure they are able to give informed consent

Hired transport – The Visit Leader must as far as possible be assured that vehicles are well maintained and fit for purpose and that measures will be put in place to address the potential dangers of driver fatigue and over loading.

Public transport - Whilst some countries have high standards of provision others can have unreliable and overcrowded transport. It will be necessary to research the situation thoroughly before committing to using public transport, with particular focus on whether the group can be adequately supervised in a potentially uncontrolled situation. The impact of a large group of young people on other travellers also needs to be considered.

Self-drive hire vehicles – Plan to use reputable hire companies and find out the legal requirements for driving in each country concerned. Previous experience of driving in the country is highly desirable before driving vehicles containing participants.

11.11 Accommodation



Prior to the visit

Prior to the visit the Visit Leader should if possible / appropriate:

- Make a prior visit
- Ask the tour operator for detailed information
- Compile a risk assessment
- Obtain a floor plan showing the location of the group's rooms. Ideally the rooms should be close together, with the leaders' quarters located nearby or adjacent to enable adequate supervision
- Allocate rooms to participants
- Ensure the Code of Conduct covers behavioural expectations when in their rooms
- Provide information for parents and participants about the type, quality and organisation of the accommodation



On arrival

On arrival the Visit Leader should:

- Carry out a fire drill as soon as possible to ensure all participants are aware of the layout of the building, its fire precautions/exits, and the fire assembly point
- Check for any potential hazards (balconies, electrical connections, access to other rooms, external noise etc.) and if necessary establish control measures to deal with these. Where the hazards are extreme or cannot be managed adequately consideration has to be given to insisting on alternative accommodation
- Check that the bedding provided is clean
- Ensure all participants are aware of the system to ensure they are secure overnight
- Ensure that the participants are aware how to obtain assistance if required at any time

Advice and examples for **involving children and young people in planning visits** can be found in the **Toolkit**.

11.12 Adventure Activities

Standards of safety requirements for Adventure Activities vary from country to country

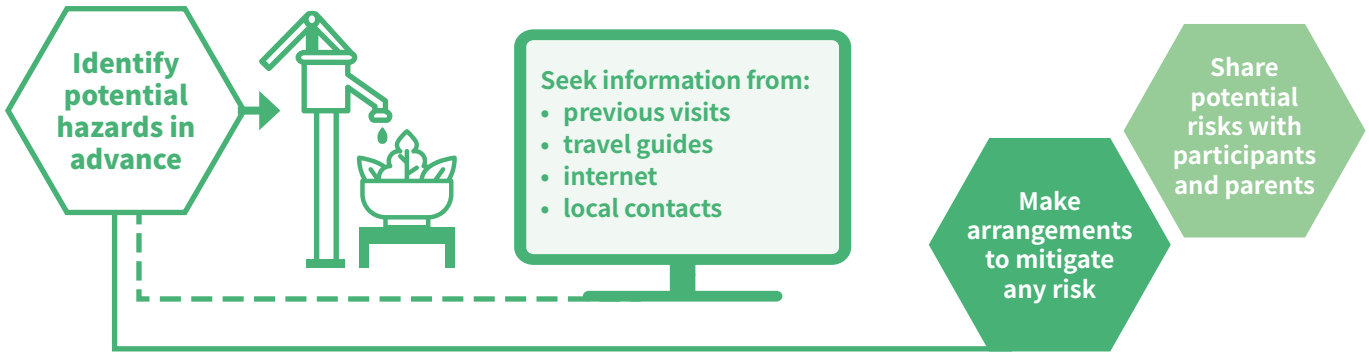
Questions need to be asked to ensure activities will be well organised, safely carried out and that any differences in operations are acceptable

Adventure Activities abroad, whether organised by the Visit Leader or by a tour operator, require careful consideration. In many countries there are equivalent standards and/or regulations to those found in Scotland. However, in many other places the standards of safety required of providers are more limited or even non-existent. Pertinent questions will need to be asked to provide assurances to parents that activities will be well-organised, safely carried out, and that any differences of operation are acceptable. Visit Leaders will almost certainly have to seek advice from their Employer about this aspect at an early planning stage.



11.13 Food and drinking water

Food, drink and hygiene overseas can vary considerably from the UK. It is advisable to identify potential hazards in advance and to make arrangements to mitigate any risk. A pre-visit or seeking information from previous visitors will be useful sources of information, as are travel guides and the internet. Information about potential risks should be shared with participants and parents.





Ensure participants are familiar with local custom and cultural differences. A basic knowledge of the language will enhance the experience

11.14 Language and local customs

It is an important part of any excursion abroad to investigate and understand the cultural differences of the country you intend visiting. The aim should be to familiarise the participants in the habits and customs of the country so that they can interact in a socially aware way ensuring that they do not offend local customs. With this in mind a basic knowledge of the language can greatly enhance the experience of the visit for the participant.

Visit Leaders should be able to communicate effectively in the native language of the country or through a translator in order to manage the business relating to the visit or any problems arising.

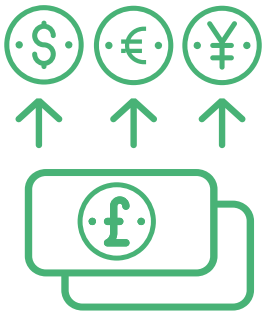
It is also important to know the laws that apply to your participants in the country visited, such as the age of consent, or the age at which alcohol can be bought and consumed.

11.15 Weather, climate and clothing

Research the conditions prevailing at the time of the planned visit. This information should be used to inform participants and parents about any particular clothing/ equipment requirements for the planned activities and to raise awareness of any significant risks.

11.16 Currency and contingency funds

It will be important to consider how spending money and contingency funds will be kept safe and accessed throughout the trip.



The following questions are examples of what should be considered by the staff team:

- Do the staff team take shared responsibility for carrying spending money to reduce risks of theft?
- Do the staff team have access to a credit card as part of the contingency fund?
- How would the staff team pay for medical care if required?
- When/how do the staff team exchange currency?
- Is there a safe in the accommodation?



The Visit Leader and Establishment Based Contact should agree the protocol for communication prior to departure

11.17 Communication

In addition to the guidance in **Section 14** (Emergency Procedures) the communication system for an Overseas Visit has to be flexible yet robust. It is necessary to have a plan in place to enable routine and emergency communications with consideration being given to different time zones, mobile coverage, costs etc.

It is important that the Visit Leader and Establishment Based Contact have agreed the protocol for communication prior to departure. Research has to be done to ensure that any plans are realistic and workable.

It is essential that participants and parents are clear about how and when communication will be possible and/or allowed. Participants should be made aware

11.18 Emergency Details

During an Overseas Visit it is important that the Visit Leader has adequate knowledge and information about participants to ensure their wellbeing.

Parents should be given the opportunity to pass on any relevant information on the Consent Form and by more informal approaches in the case where there is a need to provide more sensitive information discreetly.



It is important that parents have the opportunity to pass on relevant information about participants, particularly if the trip involves activities or locations with specific risks

The Visit Leader must carry up-to-date information for all participants (including accompanying adults) on the following:

- Relevant medical information
- Emergency contact details
- Any other information relevant to the specific visit, such as behavioural and psychological knowledge

It is essential that this information is shared with all the accompanying adults and external providers as appropriate.

For Overseas Visits that involve Adventure Activities or venues with specific identifiable risk, it may be appropriate to ask parents for information that may have an impact on the Health and Welfare of the participant (e.g. fear of heights, allergies to animals etc.)

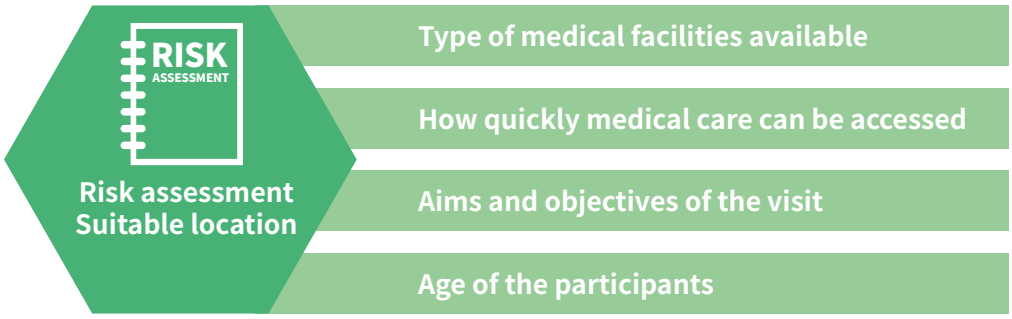
11.19 First Aid and Medical Facilities

Access to medical assistance and facilities, and the standard of those facilities, needs to be outlined to participants and parents in the early planning stage. The aims and objectives of the visit can influence the degree of risk that parents and participants will find acceptable.

For example parents of a young person going on an Overseas Visit to Europe could reasonably expect access to similar medical care to that available in the UK. By contrast, the parents of a young person taking part in a visit to a developing country would need to accept that access to medical care is limited.

When considering the location of an Overseas Visit it is an important part of the risk assessment to consider:

- The type of medical facilities available
- How quickly medical care can be accessed
- The aims and objectives of the visit
- The age of the participants
- Any known medical needs





The risk assessment process will assist Heads of Establishment and Visit Leaders to agree the level of first aid provision that is required.

Although it would always be advisable to have a trained First Aider accompanying any Overseas Visit, it may be the case, that where the risk assessment determines the risk to be low, it may not be necessary to provide a trained first aider among the accompanying staff.

By contrast, if the risk assessment indicates a raised or high level of risk it will be necessary for one or more of the accompanying staff to hold a first aid certificate.

It should be noted that there are different levels of first aid training and qualification. Visit Leaders should consult with their Local Authority or Employer to establish the level of first aid required

11.20 Natural Water Swimming Activities



Swimming and paddling in natural waters such as rivers, canals, the sea or lochs can present significant hazards and the Visit Leader must prepare a risk assessment detailing any significant hazards and how they will be controlled. If this is a planned activity it is expected that the Visit Leader, or other designated supervisor in the group, will have had the appropriate training as recommended by the RLSS or other appropriate National Governing Body to supervise this activity.

Approval should be given before considering swimming in natural waters

Approval should be given initially by the Head of Establishment before being submitted to the Local Authority or Employer to confirm the safety of swimming in natural waters.

Unplanned swimming in natural waters should be avoided

Unplanned swimming in natural waters such as the sea, lochs, rivers etc. should be avoided and this should be made clear to participants in the planning stage.

11.21 Unsupervised Swimming Pools and Pools Abroad

There are generally varying levels of provision in terms of facilities and safety management provided in swimming pools overseas.

When planning to use an unknown swimming pool for the first time the Visit Leader will need to consider the following:

- Has parental consent for use of a swimming pool been given?
- Has the swimming ability of participants been confirmed?

- Is the supervision provided by the owner/operator adequate, i.e. will lifeguards be on duty when the pool is open?
- How will use of the pool be supervised by the Visit Leader or accompanying staff and are they adequately experienced?
- Is life-saving equipment available?
- Are there adequate means of summoning help?
- Is the water clear?
- Are the changing facilities adequate?



Approval to use an unsupervised pool should be given by the Head of Establishment before submitted to the Local Authority or Employer

When considering whether to use a swimming pool that is unsupervised it is also essential to consider the depth, layout and size of the pool.

The risk assessment process should list the control measures for these factors and identify whether they are adequate to allow the activity to proceed.

Approval should be given initially by the Head of Establishment before being submitted to the Local Authority or Employer to approve the use of an unsupervised swimming pool abroad.

11.22 Exchange Visits and Homestays



The Planning of Overseas Visits that entail accommodating participants with host families introduce additional considerations. These include:

- Choice of host families. If working with a partner school, or agent, they should normally undertake this role
- Matching each participant to a suitable family
- Vetting host families. In the EU there are normally systems in place to allow this to take place. If working with a partner school, or agent, they should undertake this role. Where no system exists it will be necessary to cover the possible consequences in the risk assessment, and provide detailed information to parents to enable them to give informed consent
- Setting up a communication system. This should include having a system so that participants can request staff support should they feel vulnerable or unsafe
- Ensuring that the itinerary and activities whilst with the host families are compatible with the overall ethos and are acceptable to the parents
- Checking that the accommodation arrangements are suitable. Participants should have his/her own bedroom that is not part of a passage to other bedrooms, and a lockable bathroom
- Checking that additional support needs can be adequately accommodated
- Ensuring that at an early stage there are good communication channels with key personnel at the location and in the exchange country

Additional planning resources can be found in the toolkit

Additional planning resources can be found in the **Toolkits section**.



12. | Adventure Activities

12.1 Introduction

12.2 Approval

12.3 Licensing

12.4 Adventure Activity Qualifications

12.5 Establishment-led Adventure Activities

12.6 Information for Parents / Parental Consent

12.7 Preparing Participants

12.8 Remote Supervision during Adventure Activities

Contents

12.1 Introduction

Adventure Activities should form part of the natural progression of outdoor learning opportunities offered to young people. They can contribute greatly to the personal and social development of an individual as well as increasing their understanding of risk management.

Adventure Activities can be part of any category of visit and reference should be made to the relevant procedures within each specific type of visit.

If planning a visit which will include an Adventure Activity, the Visit Leader is advised to seek advice from their Local Authority[34] or Employer.



12.2 Approval

Where Adventure Activities are part of a visit, approval should be given initially by the Head of Establishment and then by the Local Authority[35] or Employer to confirm the safety of the adventure element.



The Visit Leader needs to be aware that some Adventure Activities require the provider to hold a licence

12.3 Licensing

Adventure Activity licensing came in to existence in 1996 and is managed by the Adventure Activities Licensing Authority.[36] The scheme aims to ensure that Adventure Activity providers follow good safety management practices to minimise the likelihood of young people being exposed to avoidable risks of serious injury or death.

Further information about Adventure Activities licensing can be found on the HSE website.[36]

The Visit Leader needs to be aware that some activities fall "within scope of the licence" and that anyone who provides these activities must hold a current licence. If planning a visit which will include an adventurous activity, the Visit Leader is advised to seek advice from the Local Authority[37] or Employer.

[34] https://sapoe.org.uk/our-members/
[35] https://sapoe.org.uk/our-members/
[36] http://www.hse.gov.uk/aala/index.htm
[37] https://sapoe.org.uk/our-members/

12.4 Adventure Activity Qualifications

Many Adventure Activities are overseen by National Governing Bodies. These organisations control the training and assessment of leaders and have a system of progressive qualifications. Further guidance can be found on the HSE website[38] but the Local Authority[39] or Employer should be consulted regarding the requirements within each Local Authority or organisation.

If planning a visit which will include an Adventure Activity, the Visit Leader is advised to seek advice from the Technical Advisor[40] to ensure that an appropriate qualification is held for the activity.

If an Adventurous Activity is planned seek advice from a Technical Advisor to ensure that an appropriate qualification is held



12.5 Establishment-led Adventure Activities

Visit Leaders wishing to organise and deliver their own Adventure Activities should:

- Hold the relevant qualifications or have the necessary experience. It is acceptable to have been assessed and approved by an appropriate Technical Advisor and have a signed statement of competence
- Prepare the relevant risk assessments
- Ensure that any equipment and supervision are in line with advice provided on their training and/or assessment courses.

[38] https://www.hse.gov.uk/aala/index.htm
[39] https://sapoe.org.uk/our-members/
[40] https://www.hse.gov.uk/aala/index.htm



Many Adventure Activities are overseen by National Governing Bodies. These organisations control the training and assessment of leaders

If planning a visit which will include establishment-led Adventure Activity, the Visit Leader is advised to seek advice from the Local Authority[41] or Employer.

Approval should be given initially by the Head of Establishment and then by the Technical Advisor to confirm the safety of the adventure element.

12.6 Information for Parents / Parental Consent



Parental consent has to be obtained for any visit which involves Adventure Activities

For any visit which involves Adventure Activities specific information has to be provided in writing to parents and should include:

- The activities and the learning objectives
- The venue
- Medical provision
- Supervision arrangements
- Travel arrangements
- Insurance cover

Parental consent has to be obtained for any visit which involves Adventure Activities. Detailed information has to be provided regarding the visit in order to enable parents to give informed consent.

[41] https://sapoe.org.uk/our-members/

12.7 Preparing Participants

It is particularly important for any visit which involves Adventure Activities to ensure that participants are adequately prepared.

Participants should be informed about:

- The nature and demands of the visit
- The supervision arrangements, including which adult is responsible for them
- The standards of behaviour expected at all times
- What to do in the event of an accident / incident



The Visit Leader should ensure that:

- The aims and objectives of the visit are clear
- The planned activity matches the age and ability of the participants
- The participants are adequately trained for the venture

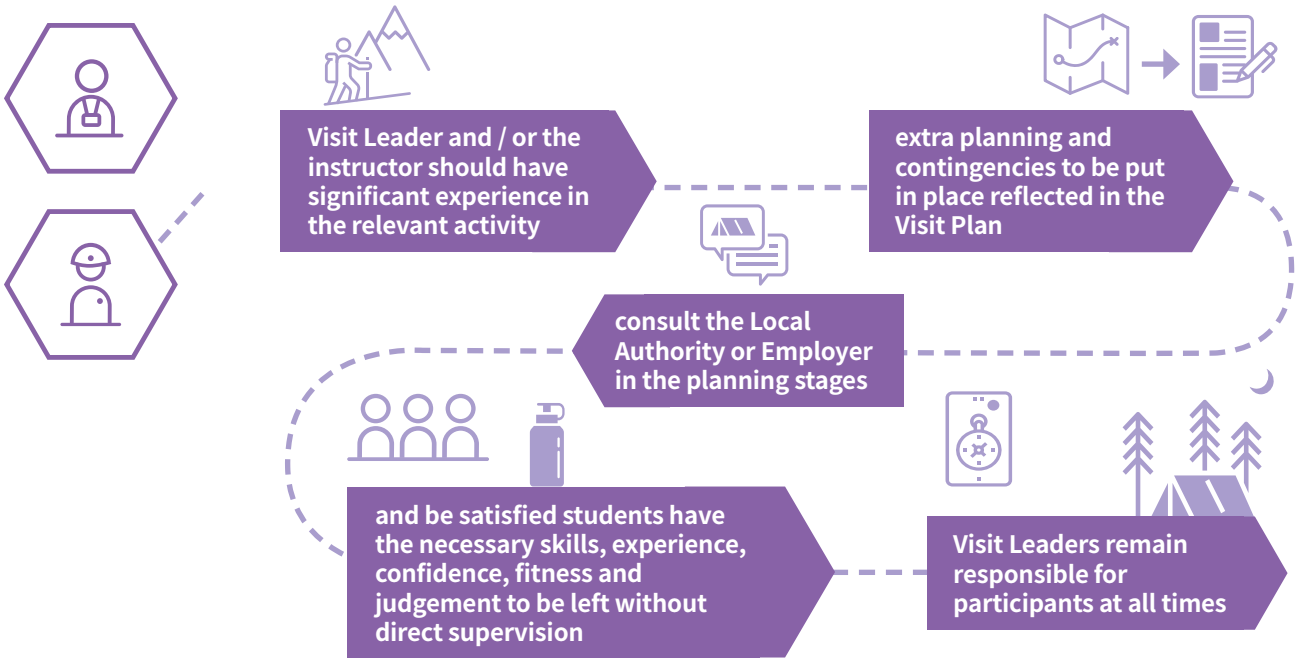
Remote supervision can help learners to develop independence and self-reliance

12.8 Remote Supervision during Adventure Activities

Remote Supervision is the term used when the Visit Leader is not directly present with participants. Working without immediate supervision can help learners to develop independence and self-reliance.

If Remote Supervision is used as a part of the delivery of Adventure Activities the Visit Leader and/or the instructor should have significant experience in the relevant activity and should consult the Local Authority[42] or Employer in the planning stages.

Visit Leaders remain responsible for participants even when not in direct contact with them. They should not underestimate the challenges of remote supervision. It requires extra planning and contingencies to be put in place. This should be reflected in the Visit Plan.



When such activity is planned the Visit Leader must be confident that learners have the appropriate skills to operate without undue risk. Training and briefing should reflect this.

The Visit Leader in conjunction with a suitably qualified instructor should be satisfied that the participants have acquired the necessary skills, experience, confidence, fitness and judgement to be left without direct supervision.

The withdrawal of direct supervision should be a gradual four stage process:

- Accompanying the group
- Shadowing the group
- Checking regularly at agreed locations
- Checking occasionally at agreed locations

Particular attention needs to be given to the information provided to parents and participants before using remote supervision.

[42] https://sapoe.org.uk/our-members/



13. Venues with Specific Planning Considerations

13.1 Coastal Visits

13.2 Natural Water Swimming Activities

13.3 Unsupervised Swimming Pools and Pools Abroad

13.4 Farm, Agricultural and Animal Visits

Contents

13.1 Coastal Visits

Visits to coastal areas can be hugely enriching, however they require additional consideration in the planning stages. This type of visit includes the following areas:

- Cliff top and coastal paths
- Beach / rock pools
- Tidal areas
- Causeways
- Harbours





The Visit Leader must prepare a risk assessment detailing any significant hazards and how they will be controlled

In some locations it can be important to be able to assess the dangers using specific technical or local knowledge. The Visit Leader must prepare a risk assessment detailing any significant hazards and how they will be controlled.

Approval should be given initially by the Head of Establishment before being submitted to the Local Authority[43] or Employer to confirm the safety of the coastal element.

13.2 Natural Water Swimming Activities

Swimming and paddling in natural waters such as rivers, canals, sea or lochs can present significant hazards and the Visit Leader must prepare a risk assessment detailing any significant hazards and how they will be controlled.

The Visit Leader, or another designated supervisor in the group, must have had appropriate training as recommended by the RLSS or other appropriate National Governing Bodies.

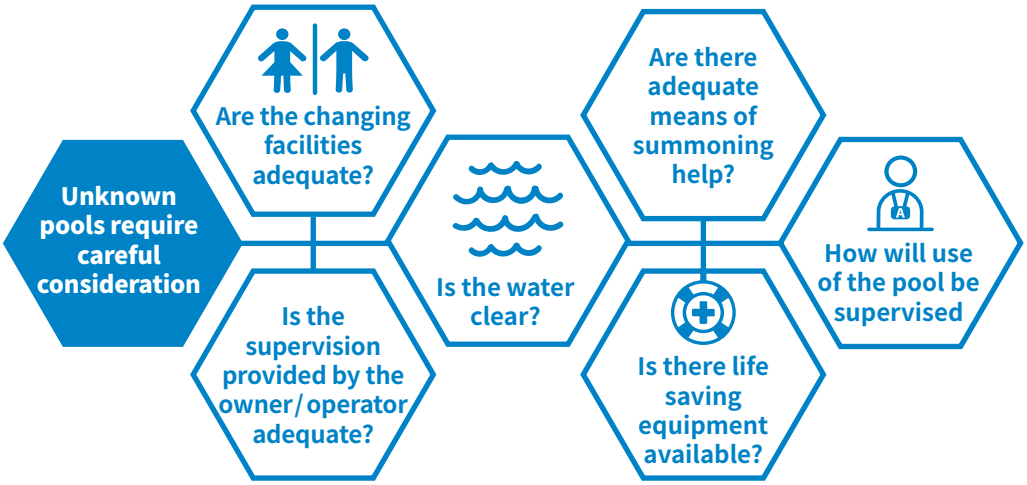
Approval should be given initially by the Head of Establishment before being submitted to the Local Authority[44] or employer to confirm the safety of swimming in natural waters.

[43] https://sapoe.org.uk/our-members/
[44] https://sapoe.org.uk/our-members/

13.3 Unsupervised Swimming Pools & Pools Abroad

Swimming pools in hotels and abroad are likely to have varying levels of safety and facilities. When planning to use an unknown swimming pool for the first time the Visit Leader will need to consider the following:

- Has parental consent for use of a swimming pool been given? Has the swimming ability of participants been confirmed?
- Is the supervision provided by the owner/operator adequate, i.e. will lifeguards be on duty when the pool is open?
- How will use of the pool be supervised by the Visit Leader or accompanying staff and are they adequately experienced?
- Is life-saving equipment available?
- Are there adequate means of summoning help?
- Is the water clear?
- Are the changing facilities adequate?



The risk assessment process should list the control measures for these factors and identify whether they are adequate to allow the activity to proceed

When considering whether to use a swimming pool which is unsupervised it is also essential to consider the depth, layout and size of the pool.

The risk assessment process should list the control measures for these factors and identify whether they are adequate to allow the activity to proceed.

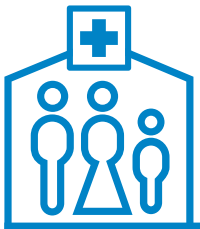
Approval should be given initially by the Head of Establishment before being submitted to the Local Authority[45] or Employer to confirm the safety of the unsupervised swimming pool/pool abroad.

[45] https://sapoe.org.uk/our-members/

13.4 Farm, Agricultural and Animal Visits

Visits to farms can present particular issues in relation to health. Animals naturally carry a range of micro-organisms, some of which can be transmitted to humans, in whom they may cause ill health and which in some cases may be severe or life threatening. These are referred to as zoonotic diseases and commonly include E.coli O157 and cryptosporidium.





If any child or member of the group shows signs of illness after contact with animals, advise them or their parent/guardian to visit their doctor and explain their recent visit

The following sources of information will provide Visit Leaders with what they need to know before farm visits and what precautions they can take to stay safe. Visit Leaders should also refer to their Employer's policy:

- Information on preventing or controlling ill health from animal contact at visitor attractions or open farms can be found on the HSE website.[46] A 'Code of Practice' along with a summary of controls and a teacher's supplement is available at the Visitmyfarm website.[47] (AIS23: 'Preventing or controlling ill health from animal contact at visitor attractions' has been withdrawn)
- Farmwise - Health and Safety Executive MISC165[48]
- Guidelines for Farm Visits[49] - The Royal Highland Education Trust

If any child or member of the group shows signs of illness (i.e. sickness or diarrhoea) after a visit, advise them or their parent/guardian to visit the doctor and explain that they have had recent contact with animals.

[46] https://www.hse.gov.uk/agriculture/topics/visitor-attractions.htm
[47] https://visitmyfarm.org/resources/code-of-practice
[48] https://www.hse.gov.uk/pubns/books/hsg270.htm
[49] http://www.rhet.org.uk/Teachers/Farm+Visits



14. | Emergency Procedures

14.1 Introduction

14.2 Preparation

14.3 Establishment-Based Contact

14.4 Immediate Action in an Emergency

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14.1 Introduction

Emergency procedures are an essential part of planning a visit. All establishments and organisations should follow their Employer's guidance on emergency planning procedures, which should include a definition of an emergency or serious incident.



14.2 Preparation

Prior to departure on any visit, information should be left with a pre-arranged Establishment-Based Contact. This information should include:

- Group names
- Visit location and itinerary
- Expected timings
- Transport arrangements
- Emergency contact details for participants
- Medical information regarding participants



Participant emergency contact details should be carried by the Visit Leader and other Visit Assistants

However this may not be necessary if visiting the local area within normal session hours

Where appropriate this information should be carried by the Visit Leader and other Visit Assistants. If the visit is in the local area within normal session hours there is no need for the Visit Leader to carry emergency contact details as these will be readily available at the base should they be required.

Preparing participants

It is essential that all participants are advised of the protocol if involved in an accident or incident. It is good practice to inform participants that in an emergency situation the use of electronic devices to send messages, take photographs or video will be prohibited until advised otherwise by the Visit Leader. This is to ensure that relevant information is passed on to the appropriate people in a timely and organised manner.

14.3 Establishment-Based Contact

The Establishment-Based Contact has a key role in the Emergency Procedure. It is their role to ensure that:

- Information regarding a visit is kept in a secure but accessible location
- If a visit is returning outside normal hours, or involves an overnight, that visit information is readily accessible
- They know who to contact if an accident or incident is of a serious nature
- They are available 24/7 throughout the duration of the visit

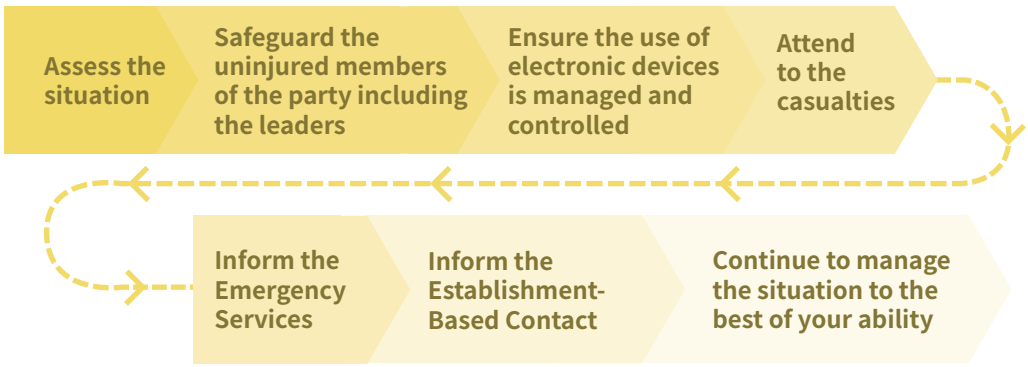
The nature, duration and type of visit will determine the most appropriate Establishment-Based Contact

The nature, duration and type of visit will determine the most appropriate Establishment-Based Contact. For visits of a longer duration or those involving higher risk activities it is recommended that more than one Establishment-Based Contact is provided.

14.4 Immediate Action in an Emergency

In the event of an emergency the immediate priorities of the Visit Leader or any Leader who has to deputise for them, are to:

- Assess the situation
- Safeguard the uninjured members of the party including the leaders
- Ensure the use of electronic devices is managed and controlled
- Attend to the casualties
- Inform the Emergency Services
- Inform the Establishment-Based Contact
- Continue to manage the situation to the best of their ability



14.5 External Contact

An incident or accident can attract media attention

Communication with the media needs to be undertaken by someone trained in this role

With advances in technology and the universal use of electronic devices it is important that a protocol is established for external communication in the event of an accident/incident. It is good practice for the Establishment-Based contact to co-ordinate communication with parents and/or the media; however it is important to recognise that there may be circumstances where information is leaked via social media.

Setting up a system where information can be sent to all emergency contacts quickly will reduce the likelihood of information reaching parents from another source.

If an incident or accident is likely to attract media attention, it is important wherever possible that communication with the media and other external agencies is undertaken by someone trained in this role. The following points should be considered:

- Nobody in the party should speak to the press
- Media enquiries should be referred to a designated media contact
- Opportunities for external agencies to get access to group members and leaders should be minimised
- Group members should be discouraged from phoning home in the immediate aftermath of an incident - inaccurate or incomplete information might cause unnecessary speculation and anxiety. However a responsible person should do so on their behalf to provide reassurance if there is potential for a media leak
- Casualty names should not be released externally
- Nobody should discuss legal liability with other parties
- Group members should be discouraged from taking personal photographs of accident sites (see **Section 14.2**)



It is often hard to assess whether group members not injured or directly involved in the incident have been traumatised

14.6 After a Serious Incident

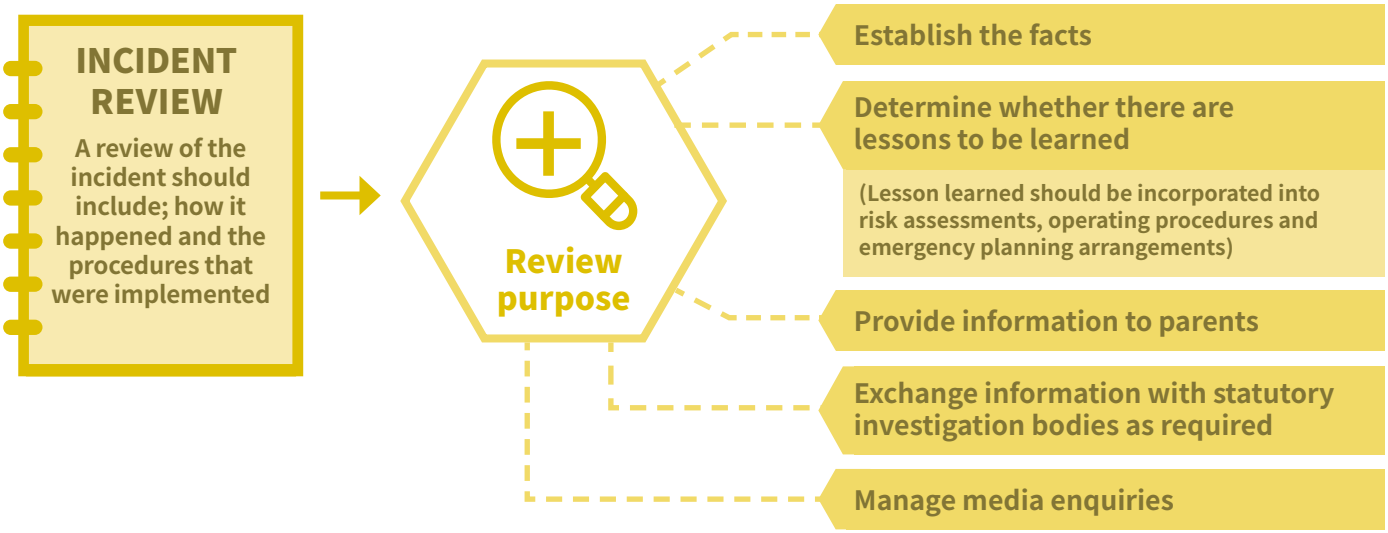
It is not always possible to assess whether group members not injured or directly involved in the incident have been traumatised or whether other participants or staff in the establishment have been affected. In some cases reactions do not surface immediately. Establishments in this situation have sometimes found it helpful to contact local community support services and to seek professional advice on how to help individuals and the establishment as a whole cope with the effects of a tragedy.

Local community support services offer professional advice to help cope with the effects of the tragedy

Following any serious incident in which an authority's emergency procedures have been utilised, it would be appropriate to conduct a review of the incident and how it happened, and of how the procedures were implemented. Any lessons to be learned should be incorporated into risk assessments, operating procedures and emergency planning arrangements.

The purpose of the review should be to:

- Establish the facts
- Determine whether there are lessons to be learned
- Provide information to parents
- Exchange information with statutory investigation bodies as required e.g. police, Health & Safety Executive
- Manage media enquiries



14.7 Reporting Accidents and Incidents

Any near-misses must be reported to the Head of Establishment and recorded as appropriate

The Employer's accident reporting procedures should be used to record all accidents and incidents.

Any near-misses must be reported to the Head of Establishment and recorded as appropriate. Any lessons learned as a result of a 'near-miss' should be incorporated into risk assessments, operating procedures and emergency planning.

Toolkits

The documents contained in the following sections can be found in the "Toolkits" section of the Going Out There website: http://www.goingoutthere.co.uk/toolkits

15. | Toolkit – Routine and Expected Visits
Read more

16. | Toolkit – Day Visits
Read more

17. | Toolkit – Residential Visits
Read more

18. | Toolkit – Overseas Visits
Read more

19. | Toolkit – Adventure Activities
Read more

20. | Matrix – Visit Approval, Medical Information and Parental Consent Read more

21. | Toolkit – Exchange Visits and Home Stays
Read more

22. | Case Studies and Top Tips
Read more

23. | Involving Children and Young People in Planning Off-site Visits Read more

24. | Appendix: Further Resources

HSE – School Trips: Tackling the Health and Safety Myths

www.hse.gov.uk/education/school-trips.htm

Read more →

HSE - 5 Steps to Risk Assessment and Risk Assessment and Policy Template

www.hse.gov.uk/risk/fivesteps.htm

Read more →

Childrens Rights in Scotland and UNCRC

www.education.gov.scot/resources/the-united-nations-convention-on-the-rights-of-the-child/

Read more →

https://www.legislation.gov.uk/asp/2024/1/contents/enacted

Read more →

GOING OUT THERE



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