






Procedures

OFF-SITE VISITS

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Summary of Changes¹ from Previous Versions

Version no/Date	Change	Comment	Section/ Page
4.0	Version updated.	General update and terminology update.	
	Additional wording added to clarify section 3.2.	Wording added to bring in line with Safeguarding and Child Protection School Policy.	Section 3.2
	Additional wording on Deputy/ Assistant Leader	Not an explicit requirement of the Visit Policy or Procedures, but useful for succession planning.	3.3
	Section added on Alcohol, drugs and smoking	Alcohol consumption by anyone (participants, helpers or leaders) at any time during the off-site visits is not permitted.	3.8
	Section added on monitoring	Monitoring of off-site visits by the employer (OEA), Headteachers, EVCs, and senior school leaders is essential to ensure compliance and prevent complacency.	3.21
	Section added on local/extended area and routine local off-site visits	Details of when this applies.	4.5
	Appendix 3	EV 9 form added	Appendix 3
	<i>Table started January 2020</i>		

¹ Material changes only. Minor changes (such as to punctuation, grammar, etc.) will not be listed

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1.0 Introduction

1.1 Policy Statement

Children and young people in the Bailiwick of Guernsey schools are entitled to, and regularly participate in, educational visits and off-site learning opportunities (including adventurous activities) as part of their learning, educational experience and personal development. These opportunities are integral to a rounded educational experience which excites, challenges, motivates and stimulates learners. Staff also benefit from visits and outdoor education. The experiences can improve relationships between staff, and staff and young people, increase the variety and interest in their work and gain the professional development inherent in organising and leading visits and managing teams.

The Education Office recognises the important role that educational visits, off-site opportunities, adventurous activities and Learning Outside the Classroom (LOtC) plays in providing a rich and rewarding education for children and young people whatever their age, ability or circumstances. The Education Office actively supports and encourages such opportunities. In so doing, it recognises that this may involve exposing participants to challenges and risks with which they may not be familiar.

These procedures describe the arrangements that must be put in place to help identify and manage risks, reducing them to an acceptable or tolerable level, ensuring a balancing of the risks against the benefits of the activity.

These procedures should be read in conjunction with the accompanying [Policy Directive Off-Site Visits and Outdoor Education](#). An online system is in place to manage the approval of off-site visits and adventurous activities as required by the policy. Access to this system is provided for all visit leaders, EVC's, Heads and Officers from Education Resources and Estates Management.

The offsite visits policy and procedures must not be used in isolation or out of context, they are part of the wider Education Office Policies which apply to Education Visits.

1.2 Application

These procedures apply to all States' Primary and Voluntary schools, Secondary Schools and the Guernsey College of Further Education.

Section 3.3.2 of these procedures apply only to the College of Further Education.

Throughout these procedures, 'Headteacher' refers to Headteachers, Principals, Heads of Service and the College of Further Education Principal, and 'school' refers to any education establishment.

The terminology describing responsibility for some of the services delivered centrally has changed. For clarity the Education Resources and Estates Management is responsible for functions relating to the Education estate, Health and Safety, Risk Management etc. The Education Office is responsible for providing governance, support and challenge to settings.

1.2.1 Definitions

The following terminology is commonly used throughout these procedures:

EVC	Educational Visits Co-ordinator (this may be the Headteacher in some schools)
Establishment	School, College of Further Education or Service
LOtC	Learning Outside the Classroom
OEA	Outdoor Education Advisor
Supervisor	This may be the Visit Leader, but could also be a member of staff or volunteer providing supervision to the visit or activity taking place as part of it
Visit Leader	An Establishment representative who is in charge of the visit (see Section 3.0 Visit Leader)
EVOLVEvisits	Education Resources and Estates Management online visit approval system

1.3 Contact Information

All communications regarding these procedures and visit approval should go to:

- D'Arcy Brimson, Outdoor Education Advisor darcy.brimson@gov.gg

Or, when D'Arcy is unavailable, to

- Jon Williams, Head of Education Resources and Estates Management
jon.williams@gov.gg

For all queries relating to insurance matters only in respect of these procedures contact:

- Lorraine Ecuyer, Administration & Procurement Manager Lorraine.Ecuyer2@gov.gg

2.0 Visit Procedure

2.1. Categories of Visits

Three categories of activities and associated approval systems are identified:

Cat	Profile of Visit	Approval
A	Visits, journeys and environmental studies for which the element of risk is similar to that encountered in daily life e.g. farm visits; visits to sites of historic, commercial or cultural interest; most fieldwork; sports and leisure centre visits; and journeys to theatre on own island base. All local walks except those listed in Category B.	Headteacher/EVC using establishment approval system
B	<p>Adventurous activities that take place within the island, with a greater potential risk and for which there is a Bailiwick system of Supervisor registration – except those activities listed within Category C. All shoreline/beach activities</p> <p>Land Based Adventurous Activities Archery, bushcraft, caving and mining, camping, cycling, fishing, horse riding, mountain and moorland activities, orienteering, rock and indoor wall climbing, skiing</p> <p>Water Based Adventurous Activities Body boarding, kayaking and canoeing, open water swimming, sailing and power boating, snorkelling, surfing</p> <p>Walking <u>Guernsey</u>: south coast path walks between Pleinmont and the Bathing Pools, walking cross the causeway to Lihou Island. <u>Alderney</u>: south coast path walks between Telegraph Bay and Essex Castle. <u>Herm</u>: south coast path walks between Rosaire Steps and Belvoir Bay.</p>	<p>Headteacher/EVC provided Supervisor/Visit Leader is suitable, The OEA can advise on appropriate qualifications. Staff must operate within the agreed requirements (and within the scope of relevant National Governing Body Award)</p> <p>Adventurous Activities</p>
C	<p>All residentials. All off-Island visits, including Herm day visits. All DoE Expeditions (approval initially via DoE Manager). All adventurous activities including the below (unless covered by Category B):</p> <ul style="list-style-type: none"> • Rock climbing beyond the site specific climbing areas • Sea journeys by canoe or kayak beyond the noted sheltered bays 	Headteacher/EVC and Education Resources and Estates Management approval is required (within

	<ul style="list-style-type: none"> • All coastering activities • Coastal sailing journey and wind surfing beyond the noted sheltered bays • Open water sea swimming beyond the noted bay areas • All other sea activities • Any activity which falls within scope of the Adventure Activity Licensing Scheme 	<p>the scope of relevant National Governing Body Award). Follow the system for Initial and Final Approval</p>
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For information related to activities in categories B and C refer to Section [5.1 Adventurous Activities](#)

2.2 Key Points in Classifying Approvals

In assessing the appropriate category in which to place an activity, the EVC will take account of the environment in which the activity will take place. An activity might be rated in a higher category if it takes place: in or near water; in winter conditions; on or near cliffs or steep terrain; in an area subject to extremes of weather or environmental change.

Visit Leaders undertaking off-site activities with young people or adults, as part of their employment, must follow the system of approval outlined below. Please note the following key points, allowing enough time to plan:

- Only the Headteacher/EVC is required to give approval for category A activities
- Category B activities may take place in potentially hazardous or remote environments and require specific skills, experience and safeguards in order to contain the risk to an acceptable level. These are generally referred to as adventurous activities. For all category B activities the Supervisor must be registered with the school. All Supervisors must operate within the limits as agreed with OEA and to the standards that are expected by the National Governing Body (NGB) of the specific activity. Headteachers/EVC must gain advice from the OEA on appropriate NGB qualifications, proof of which the school must keep a copy of. Adventure activities (self- and provider-led) that take place off island must come via EVOLVEvisits for Education Resources and Estates Management approval, who may ask for evidence of supervisor competence. If the activity proposed is within the agreed limitations the Headteacher/EVC can give approval. If the activity is beyond these limitations approval must be gained from Education Resources and Estates Management as a category C visit and with a minimum of 4 weeks' notice
- For all category C activities initial approval must be gained before any commitment is entered into. The Headteacher must give initial approval to proceed with the planning and preparation using the online approval system. Not all details will be known at this stage and only certain information on the type of activity, dates and purpose is required. Full details can be completed after outline approval is granted

and submitted again for final approval with all planning and preparation information that is necessary, with at least 4 weeks' notice

- Duke of Edinburgh expeditions are required to enter all of the details on EVOLVE for approval in the usual way (Category C visit). Route maps/details, risk management, an itinerary that outlines the parts of the visit other than the expedition phase must form part of the approval documentation. There is an additional element of approval for activities that take place as part of the Duke of Edinburgh's Award Scheme, which is managed via the Youth Commission (YC). Schools must liaise directly with YC as the provider of the awards, to ensure the YC conditions are met.
- It is possible for family and friends of staff to share the travel and accommodation arrangements with an educational visit. They may also join in with certain activities in the programme. Their participation needs to be agreed by the Headteacher; for residential trips and off-Island visits this needs to be agreed by Education Resources and Estates Management. Staff ratios must not be compromised. They must have completed appropriate DBS checks (refer to [DBS - Vetting Requirements in Education](#)). There must be adequate safeguards to ensure that this arrangement will not compromise group management and it should be detailed in the Risk Assessment. Normally an accompanying adult would have sole responsibility for the care of the child and not have direct responsibilities for the rest of the group
- All additional people must be included for final approval and preferably at the initial approval stage
- If a learner from another school (younger or older) joins the visit this needs specific approval from Education Resources and Estates Management and this request needs to be made clear on the submission. Where the age difference is significant from the group a separate risk assessment will need to be completed
- All activities in the air (except commercial flying), shooting activities and motorised sports are only permitted in exceptional circumstances
- Pets belonging to staff/helpers/learners (dogs etc.) could distract from supervision responsibilities and are not permitted on visits unless they are associated with identified needs e.g. visual impairment, or specific learning outcomes

2.3 Official/Non-School Visit Classification

2.3.1 Is the Off-Site Visit an Official School Visit? - EVC/Headteacher decision

Questions to ask yourself to assist with this decision:

1. Are school learners participating?
2. Will there be a member of staff accompanying/supervising the learners?

If 'yes' to both of these you need to consider the following:

- Has the letter of information to parents/carers/learners been written on school headed notepaper?

- Was this letter given out at school?
- Is the money paid by parents/carers/learners for the visit given in at school – paid into the school bank account?
- Has the school paid any costs for the visit e.g. travel, transport, accommodation etc.?
- Has the school administrative staff been used for any purposes associated with this visit?
- Is school/Education Resources and Estates Management transport being used?
- Is any of the organisational planning and preparation being completed in school (employer) time by a member/s of staff – with or without the learners?
- Has Education Resources and Estates Management Journey Insurance been arranged for this visit?
- Does the employee/s consider that they are accompanying this visit as part of their employment?

Please note that whether the visit takes place in ‘school time’ or otherwise is not relevant.

If you have answered ‘yes’ to any of these questions it is likely that, under scrutiny (in the event of an accident or incident), this would be considered to be a ‘school visit’ and must comply with these procedures. Why would you want to avoid doing this when the same standard of planning and preparation would be reasonably expected by parents/carers?

If you can answer ‘no’ to all of these questions, it is possible that this may be able to be a private arrangement by the States of Guernsey employee with the learners. If so this further guidance is advised:

- Best practice standard would be expected of the supervising adults and organisation providing the visit i.e. with reference to OEAP National Guidance and these Off-Site Visit Procedures
- The supervising adults are advised to consult their professional union with regard to their personal liability insurance

The following flow chart provides an overview of the steps to be followed. It is intended for quick reference use only.

OFF-SITE VISIT PROCEDURES

What	How	Who	When
Research the Venue	<ul style="list-style-type: none"> Reconnaissance, past visits, liaising with other users/Schools/OEC. Provider Quality Badge? Also check on Visit Leader competency by the EVC 	Visit Leader/EVC	Pre-planning/proposal stages
Seek outline approval	<ul style="list-style-type: none"> Brief information and only limited details required. On initial approval bookings can be made 	Visit Leader via the EVC from Headteacher	At least 6 weeks prior to departure
Planning and Preparation	<ul style="list-style-type: none"> Itinerary, specific risk assessment, generic risk assessments, ratios (and staff competency + specific group demands), specific parental consent (letter + itinerary home, parents evening), medical info, accommodation check, transport, adventure activities, insurance, expenses/costing and all in accordance with National Guidance and the Off-Site Visit Policy & Procedures. 	Visit Leader (assistance from EVC)	Prior to final approval and visit
Final Approval	<ul style="list-style-type: none"> Completed submission from Evolve Visits with the following: evidence of informed parental consent, itinerary, risk assessments any other visit specific information as per policy (eg Island school sports visits, shared school visits, etc). 	Visit Leader via EVC & Headteacher from the OEA	At least 4 weeks prior to departure
The visit	<ul style="list-style-type: none"> As per approval advice from the OEA and in accordance with itinerary. Significant changes must be agreed with your EVC and the OEA kept current. Base contact must have the full access to Evolve Visits or a hard copy of the final version of the visit pack. 	Visit Leader, staffing team with only the agreed group	On the agreed dates (inform the OEA of changes)
Review	<ul style="list-style-type: none"> Reflecting on learning opportunity that inform future visits 	Visit Leader & EVC (OEA if appropriate)	After trip

The correct line of communication should be: **Visit Leader – Educational Visits Co-ordinator – Outdoor Education Advisor – Head of Education Services and Estates Management**

These off-site visit procedures and any accompanying forms, available to download from [EVOLVE visits](#), must be used for further details. National Guidance (www.oeapng.info) must also inform off-site visit management.

Dynamic Risk Assessment is expected at all times. Visit Leaders should share planning with their group to help them take ownership and responsibility of visits. Off-Island visits are subject to laws/customs of the jurisdiction they are travelling in or transiting.

3.0 Requirements for all visits

3.1 Purpose of Visit

All off-site visits must have a clearly defined purpose (usually educational). The itinerary and choice of location, staff team and group will all compliment and enable this purpose.

3.2 Child Protection and Safeguarding

Offsite visits and activities have many benefits, but there are also potential safeguarding risks which should be considered during the planning process.

In line with the Safeguarding and Child Protection School Policy all school staff (teaching and non-teaching) and volunteers are responsible for playing their part in safeguarding and promoting the welfare of children. The policy requires staff and volunteers to undertake safeguarding and child protection training (and remain current) appropriate to their role.

Visit Leaders must ensure that they are informed/aware of any children and/or young people who may be particularly vulnerable or have specific safeguarding needs, and ensure that other staff/adults are made aware as necessary.

When any concerns about a young person arise during a visit these must **immediately** be raised with the establishment's designated safeguarding lead. When visits occur out of hours, or out of term time, the Headteacher must ensure that adequate and appropriate cover arrangements are in place for this role. The school EVC/base contact is normally a senior manager and should be able to provide support.

If a child is in immediate danger, is at risk of harm or may have been harmed, contact the local police immediately. If there are welfare concerns that are not about the immediate safety of a child then the MASH or duty social worker (out of hours) is the appropriate referral route. If there is any doubt contact the police and then refer to children's social care. For more information refer to the Guernsey and Alderney child protection procedures at: <http://iscp.gg/>.

Where activities and visits involve overnight stays, careful consideration should be given to sleeping, showering, and changing arrangements, taking into account issues of privacy and child protection. Children, young people, staff and parents/carers should be informed of these arrangements prior to the start of the trip.

National Guidance is a useful source of further information on Safeguarding during school visits.

Refer to the current [Disclosure and Barring Service – ‘Vetting Requirements in Education’](#) policy for further information on this aspect of child protection and safeguarding. For avoidance of doubt, for residential visits all adults are required to be DBS checked.)

3.3 Visit Leader

Please also refer to [Section 1.5 Off-Site Visits and Outdoor Education Policy Directive](#)

The Visit Leader is an Establishment representative who is in charge of the visit. This includes the planning, preparation and approval throughout the visit. During a visit there may be division of the group into sub-groups with separate leaders but the 'in charge' position of the Visit Leader remains.

There must be an Establishment representative who remains with all off-site groups at all times, day and night. See also remote supervision ([section 6.10](#)).

The intended scope of this guidance note is in relation to off-site visits. OEAP National Guidance details information on the underpinning legal framework of what the law requires for off-site visits. Education Resources and Estates Management’s interpretation of this in relation to non-delegable duty of care is:

- During off-site visits Education establishments and their teachers/staff cannot transfer their duty of care to a third party provider
- States of Guernsey staff are the designated ‘Visit Leader’ and must be present during all off-site visits (see also remote supervision during which visit staff must remain actively involved in the visit/activity).
- It is possible to distinguish between duty of care (which Education representatives cannot delegate to a third party, and will remain responsible for during the entirety of a school visit) and ‘technical responsibility’ (where it is entirely appropriate for them to hand their learners to a competent instructor to teach an activity e.g. climbing)
- The overall duty of care for the learners still remains with the group’s professional Education representative, member of staff or responsible adults supporting the learners
- Education representatives (the employees/responsible adults), must accompany the group the whole time during higher risk or specified activities. An exception may be where remote supervision is in place with specific risk management.
- This must be the case unless other supervision arrangements which are in the best interests of the participants have been planned and agreed (with the Visit Leader and the Provider) in advance
- The Visit Leader or their support staff/responsible adults must stop the activity if they feel it is unsafe/inappropriate

- However, where appropriate during lower risk activities at an approved multi-activity centre, Education staff can remain on site at an agreed location and in direct communication with the group

Under normal circumstances and for most category 'A' and 'C' visits the Visit Leader is chosen and approved by the head of the Establishment that they work for. National Guidance document [3.2d "Approval of Leaders"](#) must be used by the establishment head to inform the Visit Leader selection process. It is recommended that records are kept of the approval of every Visit Leader to demonstrate that the appointment has taken into account the appropriate guidance. Further information is available in the [National Guidance web resources](#).

Education Resources and Estates Management provides, and strongly recommends, specific training for Visit Leaders (especially for the Category B and C visits) which includes a practical outdoor half day Coast and Countryside course; this can be complimented by a half day classroom-based Visit Leader training session, which includes a section on risk management. Online iHASCO risk assessment training is available via the Health and Safety Manager.

3.3.1 Deputy/Assistant Leader

This role or position is not an explicit requirement of the Visit Policy or Procedures but that does not mean it is not important or useful. [EVOLVE visits](#) specifically asks for details on this for good reason. It can help to prompt a school to consider how it is managing aspects of a visit and also to help evidence succession planning for the training of new Visit Leaders. In the event that the Visit Leader is incapacitated, a deputy leader could have the competence to take charge and perhaps to initiate the Establishment Emergency Plan.

The need for a deputy or assistant leader can increase with complexity of a visit. Category C visits are recognised as more complex (off island or residential) than the standard day visits on island, thus having a deputy leader is good practice and can help in the effective supervision of the learners.

Amongst other things identifying an assistant can help:

- Demonstrate the schools planning meets good practice
- Develop staff experience and competence
- Contribute to effective supervision
- Support Leaders at a higher level during the visit
- By facilitating delegation of responsibilities (depending upon competence).

National Guidance documents provide further guidance on when and why a school would have deputy leaders.

3.3.2 Who Needs Further Leader Approval?

Establishment or school representatives (staff/teachers/LSAs) or volunteers who wish to lead in any demanding environments or adventurous activities (normally category 'B' visits) must be technically competent to do so. Schools must keep a register of these staff and retain a copy of their appropriate technical qualifications (mountain leader, Rock climbing instructor, etc.).

Prospective leaders must gain approval from their Headteacher (the OEA can provide technical advice) in order to be granted approval the applicant must have all of the following:

- Either
 - a. the relevant National Governing Body (NGB) leadership award for the environment/activity

or

 - b. have a written and signed statement of competence by an Education Resources and Estates Management agreed appropriate technical advisor verifying that the leader has the relevant technical and group management skills for the environment/activity (see below for how to arrange technical advisor approval).
- Recent and relevant experience
- A current first aid certificate or qualification (as per the NGB requirement)
- Support of the Headteacher

To arrange technical advisor approval the EVC must identify (and agree with the OEA) an appropriate technical advisor who is willing to make a signed statement of competence for the Visit Leader. Technical advisor approval is normally given only if the following conditions are met:

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

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

- a. the activity/activities at specific, named venue(s) at any time for the duration of the approval period;

or:

- b. the activity/activities at all venues that are within the remit of their competence at any time for the duration of the approval period.

The OEA can confirm with the school that a particular level of qualification is acceptable.

3.3.3 College of Further Education Visit Leader Agreement

Section 3.3.3 applies only to the College of Further Education

In certain situations Education Resources and Estates Management will approve CFE off-Island day visits led by a non-States of Guernsey employee Visit Leader. The day visit will normally be a sporting event led by competent coach who knows the individual learners attending and has been involved in training the group

In these circumstances the CFE, who must understand that the Duty of Care of the learners remains with the College, must have put in place a management plan with clear guidance regarding the expectations of the trip and the responsibilities of the adults involved in the visit. Under scrutiny it is likely that these would be seen as school visits. Parents/carers have a reasonable expectation that if their child is on a visit (even if Establishment representatives are not present), it would meet Education Resources and Estates Management (and National) best practice standards.

In these previously agreed circumstances the following must be in place:

- The non-States of Guernsey employee Visit Leader should have shadowed a similar CFE-led trip on several previous and recent occasions
- There will be two adults with the group (even where the ratio would have previously indicated only one Establishment representative need attend)
- The non-States of Guernsey employee Visit Leader will have been given suitable and sufficient training by the CFE (at its expense) to ensure they know what to do in the event of an incident in terms of following the relevant Education Resources and Estates Management and CFE procedures (Emergency action plans – EAPs/NOPs) and critical incident procedures. The training will also ensure the Visit Leader is familiar with the risk assessments associated with such a visit, as they will have ownership of this
- The CFE will remotely supervise the trip, actively checking in (via mobile, etc.) with the Visit Leader at regular intervals to ensure it is running to expectations. There must be a plan in place to ensure that the CFE can act quickly to assist the Visit Leader if necessary
- A feedback or debrief process with the learners and staff following the visit to ensure that any necessary learning is captured and implemented concerning these arrangements

- To ensure informed parental consent is sufficient, the letter home must ensure that parents/carers are aware that a non-teacher/non-employee will be leading the visit
- CFE must have obtained reassurance from Education Resources and Estates Management to ensure the visit is covered by the current group travel insurance policy
- Appropriate DBS checks and Child protection training will be in place, as will appropriate first aid cover

This arrangement does not supersede the other aspects of these procedures, which must still be followed.

3.4 Risk Assessment/Risk Benefit

The accompanying Policy Directive requires the Visit Leader to complete a visit-specific risk benefit assessment (using an EV4, a risk narrative or event specific notes on EVOLVE). Education Resources and Estates Management current pre-prepared generic visit, activity or site risk assessments may be used to complement this; thus reducing the workload and benefitting from the experience of others. These documents can be accessed from [EVOLVEvisits](#).

The visit risk/benefit assessment needs to consider any significant additional risks e.g. of the group and of any specific individual needs like medical, social, behavioural), the environment, the time of year (weather, light etc.), the site (including any changes), the specific activity, the staff team (and other people/animals), the itinerary and activities (are there higher risk adventurous ones), the distance from the school and the distance from support, etc.

Generic risk assessments being applied must be identified in [EVOLVEvisits](#) as part of the submission for approval. It is critical that these are reviewed and shared with all of the group.

Dynamic (ongoing) risk assessment is required throughout all visits and the Visit Leader must make adjustments as needed; this is no different to normal practice during the usual teaching day.

National Guidance has several very useful guidance documents on risk assessment. These must be used to inform planning and management of all visit risk assessments. They are also used in Education Office training for Visit Leaders. They can be found on the National Guidance web site. The documents are:

[4.3c Risk Management – an overview](#)

[4.3f Risk Management – some practical advice](#)

[4.3g Risk Management – what to record and how](#)

Identifying anything that may cause harm, deciding who and how people might be harmed, evaluating this information and deciding on precautions or control measures and recording this information on an EV4 form, or as a risk management narrative, or using Event Specific Notes in [EVOLVEvisits](#) as evidence of your preparation is essential pre-visit. There always needs to be the option of reviewing and updating this information so it can be informed by learning and dynamic situations.

3.5 Group List

This is a list of the names of all of the group participants and members of staff. If the visit is 'out of hours' the Visit Leader will need emergency contact details for the entire group, including staff. Form EV3 or an equivalent file may be used. The emergency contact details of all adults in the group will also be included on this form.

3.6 Ratios, Staff Team and Gender Balance

The profile of the staff team must be considered and their relevant competence for the scope of the visit. The initial risk assessment for the visit that identifies the risks with specific attention to the individuals in the group will determine the ratio of staff:pupils that is needed. Older school learners may have some supervision tasks with younger learners but they cannot be included within the visit staff:pupil ratio. Whilst over 18's are classed as adults and it is good experience for student teachers to accompany school visits, the staff team will generally be over 21 years of age. Visits will normally have more than one adult to ensure effective supervision. In some cases, based on documented risk assessment, there may be only one adult accompanying a visit, or on a particular activity during a visit. If this is the case, young people (or any adult helpers) should be competent to manage in the event of the leader being taken ill or injured and should, as a minimum, know what to do to contact the Establishment and get support.

Category C visits must have at least 2 adults (as below). In exceptional circumstances, for very small, low-risk groups, with older learners and in specific circumstances, permission may be sought from the OEA for the visit to proceed with only one adult.

3.6.1 Volunteers and Other Responsible Adults

This needs to be kept within the context of these procedures and used in conjunction with the [3.3 Visit Leader](#) and within the framework of the OEAP National Guidance for Visit Leaders and understanding their responsibilities.

It must be first determined by the educational establishment that the volunteers chosen are in fact 'responsible adults'. Sensitive criteria can be drawn up and evidence sought, subject

to the tasks required and the age and experience of the children or young people. There may be a need for training and appropriate DBS checks.

In the absence of this, and on day visits only, it might be acceptable for some volunteers to have no unsupervised contact with learners. Please refer to the [Disclosure and Barring Service - Vetting Requirements in Education Policy](#) and [Safeguarding and Child Protection policy](#) for more information.

An induction into the Establishment's and specific visit or venture's requirements is essential:

1. A guide to behaviour management and talking to children and young people
2. A guide to the supervision strategies used
3. Who (and how, when, where) to report to, work with and communicate with
4. Exact roles and responsibilities
5. An understanding of their duty of care
6. Child protection training (tier 1)

This list would need to be supplemented according to circumstances.

Note: Establishments that invest time and effort into this induction and training are significantly repaid in the support they are given, interpersonal relationships and, most significantly, the quality and enjoyment of the overall visit or venture.

The following ratios apply to the supervision of young people under the age of 18 years and should be seen as minimum figures; that is, they should not normally be exceeded except where examples are specified (also see [2.2 Key Points In Classifying Approvals](#)).

3.6.1.1 Category A

A minimum ratio of 1 adult to 15 group members is required. There may be occasions, particularly regarding the use of Bailiwick transport, journeys between school sites or within the neighbourhood of the school, where the above ratio may reasonably be increased as decided by individual Headteachers, based on an assessment of risk.

3.6.1.2 Category B

Ratios are advised for adventurous activities; please refer to the specific activity information. This may include the relevant National Governing Body award and any local procedures that Education Resources and Estates Management has in place. Please contact the OEA for more information.

3.6.1.3 Category C

1 adult to 10 group members is the required minimum staffing for all off-Island and/or residential visits, which must have the minimum of two accompanying adults (including the Visit Leader). There may be times e.g. higher risk activities (skiing, adventurous activities, etc.) when National Governing bodies, good practice, or risk assessment require more staff than the outlined pupil ratios. If you are unsure please discuss this with the OEA. Visits outside of the UK need to ensure that the ratio meets the requirements of the countries visited.

3.6.1.4 Infants - School Years Reception, Year 1 and Year 2

Within each of the above categories for young people under the age of 8 (but older than 4 years), a minimum ratio of 1 adult to 6 group members is advised.

3.6.1.5 Ratio extensions

There may be occasions (usually on island), particularly regarding the use of Bailiwick transport, journeys between specific school sites (in Guernsey or elsewhere), visits to another indoor premises e.g. St James or within the neighbourhood of the school, where the above ratios may reasonably be increased as decided by individual Headteachers, based on an assessment of risk. The Headteacher/EVC must use risk management principles to support the use of any ratio that exceeds the minimum advised in these procedures and in all such instances that risk assessment must be formally documented and retained by the Establishment.

3.6.1.6 Gender

All category C visits constituted with both genders will have a minimum of one female and one male member of staff. Single-gender groups must have at least one member of staff of the same gender. However, in the primary school setting it is acknowledged there can be exceptional circumstances where it could be unreasonable to insist on gender balance particularly where there may not be a male teacher at the school or where the school has exhausted other options.

Initially the Headteacher should consider solutions such as:

- Reviewing internal staffing options to identify whether it might be possible for an additional member of staff (of the required gender) to accompany the group. This could include considering sharing staff (a federation approach) to help meet this effective supervision need (e.g. one school borrowing a male teacher/Learning Support Assistant (LSA) from another school). Another option might be exploring the Supply Staff list
- Rotating staff on the residential so the same person does not have to attend for the duration of the visit

- Training responsible adults from the community/parents/carers - appeal for support from parents/carers (but it is acknowledged this is not always practical), accepting that vetting procedures will apply
- Contacting the centre/provider (if it is an organised visit) to explore if a member of staff from its team can be the named person to meet the gender requirement. This may leave the travel element of the visit non-compliant and this would have to be considered in the risk assessment. For example this arrangement is often made with Lihou Island and its warden. In this case the school has established a link with the partner organisation and been given the name and contact details of the member of staff (of the appropriate gender where necessary) who will provide pastoral support if required. In this situation the Headteacher/EVC will ensure that:
 - a. The named member of staff/responsible adult will need to undertake any DBS check(s) as required by the current DBS vetting policy (see DBS - Vetting Requirements in Education)
 - b. They have experience of working with young people
 - c. They will be available for the duration of the visit (e.g. in the example above staying overnight on Lihou Island)
 - d. All parties involved are aware that responsibility for the group remains with the school staff at all times, that the supporting member adult will NOT have unsupervised access to the young people and will only deal with an issue having consulted with the Visit Leader
- Following risk assessment it may be appropriate for the visit to go ahead but with a Plan B in place to get a male member of staff on site quickly if required. For example, a nominated member of staff at school will remain on 24-hour standby and is prepared to travel to the group should the need arise.

In recognition of the importance and educational benefit of residential visits, Education Resources and Estates Management may approve these visits providing that the following additional conditions have been met:

- The young people involved are known to the Visit Leader (and specific learners attending have been previously discussed and agreed with the Headteacher)
- The group size is small
- The duration of the residential stay is short (typically less than four nights)
- The Visit Leader has conducted a risk assessment for the young people involved and has determined that the likelihood of behavioural and/or significant pastoral issues arising is low
- Parents/carers have been provided with these specific supervision arrangements and have given written consent
- The Headteacher/EVC have carefully considered the staff team in relation to all aspects of the visit

- All of the staff team are aware of any special protocols the Headteacher/EVC has established to enable this kind of supervision, and that visits without a mixed balanced pupil staffing gender can leave both learners and staff more vulnerable

It should be noted that the distance (as well as the activities, environment and group) of the visit from Guernsey or Alderney could impact on the decision that Education Resources and Estates Management makes and this should feature in the risk assessment.

The school should not repeatedly use these options to staff visits, nor should they have the expectation that when a visit is approved under the above circumstances that it will set a precedent for other occasions, which could compromise what is seen as national guidance and best practice.

3.7 Schedule

The approval submission may be for one visit or a series of visits that are part of a programme. These details will be given in the approval submission. When the visit is within school curriculum time the associated scheme of work/curriculum information should be shared with the school senior management team.

3.8 Drinking, drugs and smoking

Alcohol consumption by anyone (participants, helpers or leaders) at any time during the off-site visits is not permitted. All must be aware of this policy which should be communicated in advance of every visit. Establishments must follow Education Sport and Culture '[Drug, Alcohol and Tobacco Policy](#)'. Consumption/use of any of these substances could impact insurance terms and conditions, leaving those that have participated without cover or compromising their ability to make an insurance claim.

3.9 Headteacher/EVC Approval

For every off-site activity, the approval of the Headteacher/EVC is required. This approval must be granted in EVOLVEvisits and detailed on the visit submission. In establishments where the EVC is a Senior Manager and not the Headteacher it is understood that communication is sent to Education Resources and Estate Management or a note is made on the visit submission on EVOLVEvisits with delegated duties as agreed by the Headteacher.

3.10 Establishment Records

A record of each category A, B and C visit approval will be retained by the Headteacher/EVC until the end of the academic year (this information is stored on EVOLVE). This record will include a copy of all the submitted information. It may be required during this period for monitoring by Education Resources and Estate Management. The Visit Leader will also have

a copy of the approval information from EVOLVEvisits with the Headteacher's confirmation of approval, for active reference during the visit, for her/his CPD file and to aid subsequent visit planning.

3.11 Providers

When Third Party providers are used the duty of care remains with the Education establishment and during the visit with the Visit Leader. The provider has responsibility for the instruction/supervision/technical competence of the specific activities being provided. The Visit Leader should ensure that the provider is given any information about the group that may be relevant for the quality and safety of the provision (e.g. medical or behavioural specifics). Please also refer to [Section 6.4 Quality Badge Scheme and Third Party Providers](#).

3.12 Appointed Person for First Aid

A named first aider must be identified as part of the planning process. Depending on the nature of the visit, this person will normally hold a current first aid qualification of one of the following:

- First Aid at Work Certificate
- Emergency first aid certificate
- Emergency first aid for Outdoor Activity Supervisors

In most cases the one day Emergency First Aid Certificate is sufficient however when the visit is more complex or includes adventurous activities advice on the appropriate qualification is available from the OEA.

The EVC needs to be assured that the qualification is valid. Please note that most supervisor qualifications in adventurous activities require a current 16 hour outdoor activity first aid qualification (or equivalent if agreed by Education Resources and Estates Management) to be valid. A risk assessment informed by previous experience will identify if one or more first aiders is required for a visit.

It is the Headteacher's decision to allow a group off site without first aid qualified staff (Headteacher is accountable). Where this might happen would normally be when the group is going to a venue with an appropriate first aider on site (e.g. Beau Sejour) or maybe into Town (low risk with first aiders in and around establishments being visited, etc.), or a museum where there should be a first aider (always check first). In these cases it is expected that a specific risk assessment is in place, there should be a good mobile phone reception/connectivity and the leader has some basic knowledge of first aid. Potential controls include contacting the venue/s to explore what provision is available (ensuring it is appropriate), knowing the student group and their needs, also ensuring there is a plan in place to manage the lack of qualified first aider in the supervision team. If the Establishment

is relying on a provider for this provision then a check must be undertaken that they are current with appropriate first aid qualifications.

Normally it should be school staff with the first aid competence (there might be times when the provider is not with the group – lunch time, other activities so the school would need provision for these). Parental viewpoints and expectations should be considered – e.g. would a parent be surprised to learn of pupils going on a coastal walk or beach visit without a first aider (it only takes a moment to choke at lunch time)? Does the school have staff that can properly respond (on a school site this should always be true)? As outlined, there is a little scope for variation on the procedures based on risk assessment but this should be used as intended, not considered a blanket relaxation for all activities. Wherever possible a qualified first aider should be present.

Key considerations include

1. The nature of the activity.
2. The nature of the group (any specific needs).
3. The likely injuries that may arise from the activity.
4. The extent to which the group will be isolated from the support of the emergency services (both in terms of distance and response time).

A basic level of first aid support **must be available at all times** (a qualification may not be necessary for all off-site visits). This will require that one or more of the staff leading the visit has a working knowledge of simple first aid and is competent to use first aid materials carried with the group, and they know how to access, and is able to access, qualified first aid support.

Residential and off-Island visits must always have an appropriately qualified first aider as part of the staff team.

3.13 Preliminary Site Visit (“recce”)

It is advisable for the Visit Leader to make a preliminary visit to the location if:

- The site is new to the Visit Leader
- It is possible that there may have been significant changes since she/he was last there

Due to the responsibility for the health and safety of staff, any 'pre-visit travel' or recce by any member(s) of staff must be covered by a risk assessment, not just when they are travelling with learners.

The level of detail provided in a travel risk assessment will depend on the staff competence, intended location (environment, conditions) and planned activities. The assessment may

possibly be covered via a generic assessment for some locations and modes of travel. This must be approved by the travellers' line manager (who will also have an itinerary and agreed contact detail with the staff).

3.14 Itinerary

Final approval requests must include a detailed itinerary that outlines specific information about the visit. This schedule will include all travel (and its various forms/means), all of the activities (for staff and learners) and the location of these. This information must be proportionate to the specific visit and the planned opportunities. For example:

- A visit to Lihou might include time blocks of morning, lunch afternoon, evening;
- Travel to London would itemise more clarity on specific timings and relevant opportunities;
- A walking expedition will include route plans/maps and timings; and
- A self-led visit by the school is likely to be more descriptive than details of a provider-led experience at all-inclusive school holiday centre

Gaps in an itinerary and 'free time' are as important to identify as organised supervised time because many incidents associated with visits take place during the rest and relaxation times. This helps ensure effective supervision is being managed for all elements of the visit.

Adventurous activities (e.g. Swimming, climbing, cycling, surfing) are essential to include in the itinerary for any visit, no matter where these are taking place.

To ensure informed parental consent is in place, parents/carers should have received similar information.

Significant changes following approval must be notified to, and agreed by, Education Resources and Estate Management.

Any specific risk assessments must be linked to the itinerary of the visit.

3.15 Accident and Incident Reporting

All accidents and injuries (staff and learners) must be reported on EVOLVE in the usual manner. The school must be informed as soon as practically possible of all categories of injuries that are required to be reported to The Health and Safety Executive (HSE) in compliance with the Guernsey Ordinance. The school must then report these via the usual process. Please refer to the [Health & Safety - Accident and Near-Miss Accident Reporting Policy](#) and to the [Critical Incidents Policy](#) for more information.

3.16 Evaluation

All visits should be evaluated in proportion to the profile of the visit i.e. perhaps a tick box system for a half-day visit compared to a more detailed report for a residential activity visit, particularly in respect of any potential areas for improvement. Evaluations are a useful tool and should be used to inform planning of future off-site visits.

3.17 Emergency Contact Information

Visit Leaders for all off-site visits must have a competent 24-hour Emergency Base Contact. This base contact must be part of the establishment's Senior Leadership Team and be available on-Island for the duration of the visit. This supporting 'on call' role ensures tasks that can be managed remotely will be dealt with (at least initially) by a single point of contact and without having to concern or distract the Visit Leader from their responsibilities of safe management and supervision of the group during an incident or otherwise.

For Island schools' representative sports teams this can be an establishment Senior Manager or in some cases a Senior Officer, at The Education Office. The Emergency Base Contact should ensure that the Visit Leader has their 24/7 contact information.

The establishment's complete Visit Approval pack must be secure and immediately available (kept in portable paper and/or electronic form via EVOLVEvisits) to the Emergency Base Contact. This should include the following information:

- Contact numbers of the Visit Leader and Deputy Leader (including landline contacts for Hotels and third party providers, etc.)
- Personal details of all individuals on the off-site visit
- Consent forms
- Next of kin details
- Medical declarations
- Itinerary (complete details of)
- The group's vehicle(s) registration numbers, passenger lists for each vehicle(s) and route plan(s). Separate vehicles need Deputy Leaders in each with duplicate visit packs, working under an agreed communication management plan
- Risk Assessments – generic & site specific
- Emergency contact(s) in school/Education Office
- Insurance contacts
- Any third party provider details
- Access to The Education Office Critical Incident Plan
- Overview of contingency plans

Where information is kept in electronic form it should not rely on internet connectivity to access important details that may be needed.

Headteachers must have plans in place for visits that are late back, overdue, delayed or that encounter other difficulties. This should include a check-in system for Visit Leaders to update their Emergency Base Contact ensuring all are accounted for at the appropriate time and place. This 'visit closed procedure' must be agreed between the Emergency Base Contact and Visit Leader for every visit. In case of an incident, the [LOtC Emergency Action Plan and Incident Procedures](#) should be referenced. The Education Office Critical Incident Plan may need to be engaged and contact made with a key Officer.

Plan B or contingency strategies should consider arrangements for liaising with insurance companies to establish in-principle agreements should there be reason to believe difficulties are likely to develop whilst the visit is on-going (or prior to departure). The Visit Leader must have access (directly or indirectly via the Emergency Base Contact) to sufficient funds and resources (depending on specifics of the visit - group size, location, special needs etc.) to be able to put into place a meaningful, appropriate and safe action plan. This may include use of a school purchase card (with a considered upper limit) or the establishments Emergency Base Contact/Headteacher being able to access a purchase card with appropriate available funds for emergency use on behalf of the Visit Leader. It may be necessary in certain instances to contact the Corporate Finance team to ensure a much higher temporary limit is in place for specific trips. Other possibilities may include using an agreed Travel Agent to make emergency bookings on behalf of the school in difficult situations. Contact information/procedures should have been pre-arranged.

Weather (fog, high winds, snow, rough seas, etc.), industrial action and technical problems are all real possibilities and have impacted on visits travel plans (outward and return journeys) and sometimes these factors combine to complicate both. These need due consideration when planning. Parents/carers must be kept current on significant changes to the itinerary. Pre-visit departure this is the role of the Visit Leader, and once departed the Emergency Base Contact should co-ordinate this communication.

Visit Leaders in dialog with their EVC or Headteacher should consider what contact information is given to parents/carers. In the case of an incident it is important that key phone numbers are not over burdened with communication that could be managed separately. Visit Leaders are advised to keep at least one phone number confidential (as with the Emergency Base Contact too). People/parents trying to get information can impact on necessary calls to emergency services and other agencies and this can make incident management in certain situations very challenging and subsequently increase the risks.

For all visits (including those occurring during the school holidays) there is an Education Resources and Estate Management "Key Officer" emergency system in place. Headteachers must ensure they know (or the relevant details are with the Emergency Base Contact) how

they can contact the Education Resources and Estate Management Key Officer at any given time (see the '[Critical Incident Plan](#)').

3.18 Inclusion

Every effort should be made to ensure that outdoor learning, off-site visits and LOTC activities are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender, religion or any of the other protected characteristics. If a visit needs to cater for young people with special needs, every reasonable effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

There may be exceptional circumstances to consider that could lead an establishment providing an alternative opportunity for a learner/s and this should only be explored if all reasonably practical measures have been taken to include that/those learner/s (individual risk assessment may need to be undertaken). For more information please refer to current National Guidance (OEAP) or contact the OEA for advice.

3.19 National Guidance

OEAP National Guidance (www.oeapng.info) is an excellent resource that is updated regularly with the latest information from a number of sources throughout the UK. This includes updates from the Department for Education and Health and Safety Executive in England.

Education Resources and Estates Management does not duplicate the content of this extensive guidance. It must be used in tandem and to supplement these procedures and the accompanying policy by all those supporting, leading and assisting all visits including all LOTC and adventurous activities.

3.20 Code of Practice for PE and Sport/afPE Safe Practice in PE and Sport

All establishments must have this document (current 2020 edition – updated every 4 years) and supporting media available for staff and must ensure the appropriate staff are aware of it. It is not only relevant for establishments planning sports visits; it contains information on adventurous activities as well as a comprehensive guidance to how establishments and employees involved in physical education and other activities should manage their health and safety responsibilities.

Education Resources and Estates Management does not duplicate the content of this relevant guidance. It should be used in tandem and to supplement these procedures and the accompanying policy by those members of staff who are responsible for the approval,

planning, preparation, leading and assisting of all related visits, LOtC and adventurous activities.

For all guidance related to school visits and outdoor education adventure activities, these procedures and associated information on ConnectED take precedence where there are discrepancies.

3.21 Monitoring

Monitoring of off-site visits by the employer (OEA), Headteachers, EVCs, and senior school leaders is essential to ensure compliance and prevent complacency. Monitoring of educational off-site and residential visits should be undertaken annually on a sample basis.

Monitoring must include:

- Scrutiny of systems, procedures and planning
- Field observations of management arrangements on a sample basis either by arrangement, on short notice or without warning.
- Following up accidents, incidents and near misses
- Following up accounts from other credible observers that could arrive formally or informally

Monitoring may be undertaken by anyone with a responsibility for the performance of organisations and individuals which could include:

- Schools' senior staff, Headteachers and EVCs
- Outdoor Education Advisers; other Education-appointed professionals
- Health and Safety professionals including HSE and some NGBs.
- Professionals employed by Quality Assurance schemes.

Monitoring educational visits means:

- Identifying good practice.
- Picking up poor practice and putting into place effective measures to address it
- Conducting and reporting observations so as to create the impression that all activities may at sometime be seen
- Giving out a message that creates the impression among group leaders that they could be met by someone monitoring their visit, whether it's from their authority or another or a specific monitoring agency
- Being at the site where planned activity can be seen so that it can be judged safe. It may also be measured against plans and for the quality of teaching and learning
- Creating an environment where monitoring is seen to be in everyone's interest and that as a result of monitoring reports each person stands to benefit.
- Contributing to raising standards and the quality of learning experiences

Successful Approaches to Monitoring:

- Collect information to assemble the bigger picture in order to provide a reasonable description of everything taking place and to lead towards selecting a representative sample to observe closely
- When in the field, be very careful that monitoring does not have any detrimental impact upon the activity
- Brief staff before the trip, send notes to the group leader for them to pass onto staff or meet staff on the day if there is time.
- Have a clearly stated purpose, explain what you will do and how any follow up will happen.
- Put people at ease as far as possible by not looking in any way officious.
- Avoid becoming drawn in to the visit, which happens if you get too close, but bear in mind that it is hard to hear anything from the hilltops.
- Consider the potential difficulties of inserting yourselves into the group in ways that could lead to influencing proceedings making staff become cautious about what they do and say.
- It may help to have a small notepad and pencil, a pocket size camera (be mindful of protocols for photography) and a small recording device.
- Give feedback. If at all possible, as soon after the session as is practical but as it may require a confidential conducive environment it may be worth waiting until after the visit. However, bear in mind that any subtle points are at risk of becoming lost if the feedback is left too long.
- Confirm your observations and notes with the staff before compiling a report and give them the chance to have their say before you spend a lot of time on points for which there is an explanation that you were not aware of.

Converting Monitoring into drivers of best practice requires:

- Flagging up good points as well as poor ones so as to give an overall picture of the effectiveness of the experience.
- Creating clear recommendations that are realistic and evidence based and in such a way that they can be used in any investigation or action that might subsequently arise.
- Bringing points for action to the attention of the right people who can generate the necessary response.
- Following up on recommendations and occasionally acting to overcome objections or slow responsiveness

A generic monitoring form is available in appendix 3 of this document. It will be used by Education Resources and Estate Management to help inform its monitoring of visits, schools can adapt it for their use.

4.0 Category A Visits

4.1 Establishment Category A Approval System

An internal school policy and procedure will be in place to document the approval of these lower risk visits through EVOLVEvisits. Parental consent, risk assessments and effective supervision all need to be in place and evidenced. The policy must be within the scope of both these procedures as well as National Guidance. This system must require the final visit approval by the Headteacher/EVC to the Visit Leader via the online approval system (EVOLVEvisits). It will be available to the OEA and reviewed annually by the Headteacher. Key National Guidance documents can help establishments write a procedure or policy that sets out its expectations of how outdoor learning and off-site visits will be managed. These documents are [5.3a Writing policies to reduce bureaucracy](#) and [5.3b Writing an establishment visit policy](#). More information can be found here <https://oeapng.info/downloads/policies-planning-and-evaluation/>

The internal school approval submission for a Category A visit will include the following information:

4.1.1 Required information

The following information is required prior to approval:

- Visit Leader name
- Purpose of visit
- Staff names – Establishment representatives and volunteers
- Pupil numbers, gender and age range
- Location of visit
- Dates and times/schedule
- Travel and transport arrangements
- Itinerary/activities
- Plan B contingency arrangements
- Arrangements for remote supervision
- Appointed person for first aid from the staff team
- Emergency contact details including the Emergency Base Contact (mobile and landline telephone numbers)

4.1.2 Parental Informed Consent and Medical Information

An on-entry or annual consent form for all category A activities/visits completed and signed by the parents/carers is appropriate and is the accepted practice for most establishments. It is then sufficient to ensure that parents/carers are informed as appropriate, e.g. when particular clothing is required or the start and finish times are different to the usual schedule. The form needs to request that parents/carers inform the establishment of any

medical information changes during the validity period. Form EV2 or the school/establishment equivalent might be used whilst ensuring that the essential information is both requested and supplied.

4.2 School Curriculum Category A visits

The Visit Leader for all school off-site visits will normally be a Teacher. A LSA may be approved by the Headteacher to have this responsibility. The LSA will complete the school category A system for approval for this visit with the Headteacher/EVC.

4.3 Supervision of School Groups in Curriculum Time

During school curriculum time this will be a teacher. Under certain circumstances, and with a Statement of Competence assessment agreed by the Headteacher, the responsibility for supervision of school learners in curriculum time may be with a LSA. This member of staff will be working with a group remotely supervised by a named teacher.

4.4 Providers

When external providers are used the duty of care remains with the establishment and during the visit with the Visit Leader. The provider has the responsibility for the instruction/supervision/technical competence of the specific activities being provided (as agreed). The Visit Leader must ensure that the provider is given information about the group that may be relevant for the quality and safety of the provision, e.g. appropriate behaviour and medical information. Medical information on the EV2 and EV3 forms should be available to share the relevant/necessary information with the provider.

4.5 Local/extended area and routine local off-site visits

By ensuring planned local activities are covered by a school's generic policy and standard operating procedures, a streamlined approval route using EVOLVEvisits can be taken. This applies to visits and activities that are:

- Straightforward
- Suitable for being covered by a "blanket consent", or where parental consent is not required
- Covered by a generic risk-benefit assessment

Activities and visits that can be covered in this way include:

- Activities/visits organised by schools during normal school hours, where parental consent is not required (except for nursery-age children), such as:
 - Forest Schools
 - Local sports fixtures during school hours
 - Weekly swimming lessons

- Local learning area visits such as to local parks, libraries, museums etc.
- Regular curriculum-based adventure activities (e.g. climbing as part of the PE curriculum)
- Multi-site curriculum delivery
- Activities/visits outside normal school hours, where blanket consent is appropriate, such as local sports fixtures out of school hours
- Youth “drop-in” activity centres

Such policy and operating procedures **must** cover, as appropriate:

- Scope and remit
- Clearly defined geographical boundaries
- Clearly defined activities
- Defined leader competencies/identification of approved leaders
- Leader training and induction
- Generic risk management procedures
- Parental information and blanket consent (where consent is needed)
- Transport arrangements
- First aid
- Communications
- Emergency Plan
- Curriculum planning if taking place in school time

For the procedures to be implemented on the day, the following conditions **must** be met:

- There is a sufficiently competent leader/leadership team.
- There is an emergency base contact at the establishment.
- The appropriate people know who has gone where, with whom, and when they will be back.
- EVC approval has been given.
- The Visit Leader has appropriate information about the individual needs of participants.
- Effective communication between the establishment and the Leaders is possible.
- Fits parental expectations

These visits must be logged on EVOLVEvisits.

5.0 Category B Visits

5.1 Adventurous Activities

Category B (and category C) activities may take place in potentially hazardous or remote environments and require specific competence and management in order to control the risk to an acceptable level. These are generally referred to as ‘adventurous activities’.

5.2 Supervisor Competence

For all local category B activities the Supervisor must have completed the appropriate National Governing Body Award (NGB) training and assessment or the equivalent Education Resources and Estates Management training/assessment course. All category B activity Supervisors must operate within the requirements of the relevant Education Resources and Estates Management policies and procedures and within the scope and standards that are expected by the National Governing Body of the specific activity. Qualifications, training, assessment and necessary Continuous Professional Development (CPD) must be current and updated as required to ensure competence. The OEA can advise schools on the necessary qualifications needed for various adventure activities.

5.3 Headteacher Approval

The Headteacher will approve the category B activity if it is ‘on-Island’ by following the same system as category A. Where the Headteacher does not feel sufficiently competent to complete this approval the OEA must be consulted for assistance. All of the requirements and guidance for category A visits apply to category B visit approvals.

5.4 Non-Compliant Category B proposals

If the activity proposal is beyond the scope given in [2.1. Categories of visits](#) and section [6.0 Category C visits](#), approval must be gained from the OEA.

5.5 Youth Commission Provision of Category B Activities to Education Establishments

The Youth Commission has Youth Workers with registered competence to deliver some category B activities. Please note that they should be requested in the first instance to provide category B activities for Education groups.

An establishment may ask the Youth Commission to provide an adventurous activity for their learners/students as all or part of a programme. In this instance the establishment will complete the category B approval as usual. The Youth Worker will complete Youth Commission approval to provide the activity as a Supervisor and will supply the required written information, complying with the required notice by the school, so that the establishment can complete their approval and give sufficient information to the

parents/carers. All school curriculum category B visits will have a Teacher or member of staff as the Visit Leader.

The College of Further Education will have a Lecturer as Visit Leader for all category B visits that have students less than 18 years of age in the group and are advised to do the same for all groups.

5.6 Youth Commission Provision of Category B Activities to External Youth Groups

The system of approval for category B activities must be followed and in compliance with the relevant policy and procedures. All records must be kept for monitoring.

5.7 Plan B

All category B approvals must include a “Plan B” because the nature of all outdoor and adventurous activities is such that they are dependent on weather and environmental conditions. Plan A may therefore need to be cancelled at short notice. Members of staff should be prepared to continue with an alternative planned activity for the group. The Supervisor will have been included in the approved management ratio for the group during the off-site visit. It is preferable for the group to do an alternative related outdoor activity. The same activity may be able to proceed at a lower level or at a different location. The alternative for atrocious weather conditions may be indoor group team building activities. The OEA has some resource information for this that can be loaned. This will need to be included in the information to parents/carers.

5.8 Activity Specific Informed Consent

All category B activities require visit-specific parent informed consent. This needs to be given in writing with sufficient notice for the parents/carers to be able to discuss any issues arising with the Visit Leader. If a provider is to be used for the activity this information should be included in the information provided to parents/carers.

5.9 Guernsey Sailing Trust

Sailing is a category B activity. You must ensure that specific informed parental consent is gained for this activity. A teacher must accompany all school visits and preferably be in the supervisor/safety boat on the sea with the group.

6.0 Category C visits

6.1 Outline Approval

For all category C visits outline approval from the Headteacher must be gained before any commitment is entered into by the establishment. Where the Headteacher/EVC is unsure

they should seek advice from the OEA before granting outline approval. This is essential for any expeditions or visits outside of Europe.

Few details may be known at this stage therefore the following sections of EVOLVEvisits only need only be completed by the visit leader before submitting to the EVC and Headteacher:

- Visit Purpose
- If it is a joint visit, who else is involved
- Visit dates (approximate)
- Provider – to be used
- Destination
- Activities to be included in the itinerary

The outline approval may contain guidance for further action in preparation for final approval. Final approval for the visit must be obtained at least four weeks before the visit start date. Confirmation of the approval decision for a visit will be given via EVOLVEvisits, those that require Education Resources and Estates Management approval must not proceed until this approval has been given. The insurance is dependent on this approval.

Where further information or elements of the visit procedures or (OEAP) National Guidance for Educational Visits have not been met, approval may be deferred until these conditions are met. Confirmation of this decision will be communicated to the EVC/Head.

Off-Island visits are subject not only to UK/Guernsey legislation and best practice, but also to the laws, regulations and customs of the country/countries of the trip (and any jurisdictions that are transited).

6.2 Further Planning and Preparation

Following initial approval the Visit Leader will work with the EVC to complete the planning and preparation of the visit in compliance with these procedures and to ensure that all is completed within the required time limit. Priority attention will need to be given to the planning as appropriate. The Visit Leader and EVC will complete a visit risk management plan (see [Off-site visits and Outdoor Education - Forms](#)). [National Guidance mind map](#), generic risk assessments and checklists can help with this process.

6.3 Staff Team

Staff should always be able to work within their confidence and competence on all visits, though extending their visit experience in stages. The points made in section [2.1. Categories of visits](#) (refer to sub-section 2.1.10) regarding the staff visit competence with relevant experience have a greater importance here. There should be a progression for staff with the school visits prior to assuming responsibility as a Visit Leader. In addition

appropriate confirmation may need to be sought from new staff when previous experience has been declared but is not known first hand. The OEA may be able to assist with contacts to UK local authorities.

6.4 Quality Badge Scheme and Third Party Providers

For any off-site visit, the Visit Leader must check that the competence of staff, the environment and activities offered are educationally suitable for the group and will meet the aims and objectives of the visit. Check that any provider offers good value for money by comparing with other similar providers. Talking with other schools and using searches on the internet can help to inform this. There is no substitute for first-hand, up-to-date information.

Where opportunities that fall within the scope of these procedures and the accompanying Off-Site Visits Policy Directive ([Off-site visits Policy](#)) are being provided by a third party, Education Resources and Estates Management require that:

- Reasonable and appropriate checks are carried out of any external organisation/s that are contracted to provide any activities, regardless of whether these activities are being carried out on-site or off-site, to ensure that they are competent to provide such activities. Checks would normally be made via an external validation process using an Inspection and Accrediting Body, which may include:
 - The Adventure Activities Licensing Service
 - The Learning Outside the Classroom Quality Badge
 - Adventuremark or sector approval schemes including the equivalent Guernsey HSE adventure activity licencing inspection

Education Resources and Estates Management endorses the LOtC Quality Badge scheme as acceptable without further in-depth checks being required. Visit Leaders and EVCs still need to be involved in the booking and planning of opportunities to ensure they are appropriate for the intended group. This is to ensure that:

- The performance of external organisations is adequately monitored to ensure that agreed practices are being met
- Significant findings of monitoring and session evaluations are acted upon and are reported to the OEA

Where opportunities involve either residential, travel off-Island, or the provision of adventure activities, whether led by The Education Office employed staff or by a third party provider, Education Resources and Estates Management requires that these be notified to the OEA for initial approval early in the planning stages. Final approval must later be gained before the activity can take place.

The LOtC Quality Badge scheme has a registration system that is available to all UK providers of educational visits. These include learning linked programmes, accommodation and transport. UK providers with centres located in Europe are also included.

Education Resources and Estates Management has agreed normally to use only Quality Badge registered providers for visits that employ a commercial company. If the visit includes adventurous activities then the Adventuremark accreditation is required. EVCs and Visit Leaders can select or check a Quality Badge provider from the search option or list of accredited providers on the LOtC website. The provision for category C visits may be similar to that of a tour operator contracted to deliver transport, accommodation, itinerary programme or activities. The contract is with the establishment and care needs to be taken to check the contract that is signed. Reference to their policy is essential. All providers of adventurous activities must be licensed with the [Adventure Activities Licensing Authority](#) (AALA) managed by the UK HSE. By following the link to the Licence Holders the activities that are licensed can be checked. These providers will generally agree to the same provision in centres based in Europe. All providers of visits beyond Europe need to be checked by the OEA or hold the Quality Badge Expedition mark, prior to any commitment being agreed.

6.4.1 Providers Without Quality Badges

Where a proposed visit is outside of the recommendation of the procedures of using a LOtC Quality Badge Provider (refer to Section 6.4 above) there remains an alternative route for approval. The [Provider Statement OEAP form 8q](#) must be completed and evidenced. This form is not a standalone document and it cannot be used just as a tick list, supporting information must be collated (e.g. copies of the centre's insurance, risk assessments/risk management plan, safe supervision/practice for activities, staff competencies, etc).

This far more onerous planning and preparation task requires thorough investigation with rigorous checks, research and follow-ups by the school who must demonstrate that the preferred provider adheres to UK Best Practice, operates within National Guidance and will continue to do so during the period of the intended visit.

The due diligence and accuracy of the information gained remains the responsibility of the Headteacher, as do any subsequent implications of making this choice. Headteachers, EVCs and Visit Leaders should be prepared for, and amenable to, an increased likelihood of Education Resources and Estate Management monitoring at any stage of these visits. If a provider is in the process of, or intending to join the LOtC Quality Badge scheme (for which evidence would have to be provided) the described process may be streamlined; the OEA will be able to provide guidance as required.

This outlined route to approval will need to take place well in advance (in some cases 12+ months) of any required booking deadlines because of the necessary time implications of

this process. This means that, once completed, schools will need to maintain communication with the provider to ensure any changes in its operating procedures do not impact on the original checks.

6.5 Risk Assessment

The itinerary will inform the risk management process in the preparation and planning for the visit. All aspects of the itinerary need to be risk assessed and the significant risks identified and considered. The fully completed final risk assessment will be included in the final approval submission. Please refer back to the guidance in [Section 3.4 Risk Assessment/Risk Benefit](#). Every-day low-level risks do not need to be included in the risk assessment unless they are considered to be significant, such as road crossings, dining out, traffic awareness, stranger danger, etc. The Visit Leader must manage these. Please do not include the management of these in the information submitted for category C Education Resources and Estate Management approval. **A copy of the specific visit itinerary should be included in the final visit approval submission.**

6.6 Total Group Information of Staff/Adults/Young People/Children

Every person that will be with a category C visit, or will be joining for any amount of time, must be detailed on the final approval submission. All members of staff and/or volunteers must be named. All children and young people must be included in the total number of the group with the appropriate age range given. It is possible for family and friends to share the travel and accommodation arrangements with a category C visit. They may also join in with certain activities in the programme. Their participation needs to be agreed by the Headteacher and the details noted in the final approval submission. The risk assessment must consider the age/experience of all children and young people participating in the activity programme of the visit, including the family of staff accompanying a visit. Staff:pupil ratios must not be compromised.

6.7 Travel and Transport

All travel and transport that is included in the visit must be detailed on EVOLVEvisits (or separately in the itinerary if insufficient space) and the significant risks managed in the risk assessment. There is a reasonable expectation (within the British Isles) that licensed and registered transport companies will meet the necessary minimum standards. The Visit Leader and EVC will need to read the 'small print' of all such providers.

If transport has been arranged by a Quality Badge holder further checks are not necessary as they will have completed this.

When travel is financed by the States of Guernsey, The Education Office or the School the States' Travel Service provider must be used. There is an emergency out of hours phone

number for assistance associated with that travel booking. The current number should be requested at time of booking. Other providers/travel agents may have a different process; however, current 24/7 emergency numbers should always be ascertained when making a booking and it is essential they are kept by the Visit Leader and the school Emergency Base Contact.

The Headteacher/EVC must ensure relevant staff have the out of hours contact numbers for providers of travel, especially when they may have sub-contracted various elements of this provision. This is particularly important when connections may be outside of normal working hours. When travel includes onward connections (flights/ferries/trains, etc.) the Visit Leader and Headteacher/EVC must be satisfied that the appropriate insurance, to cover delays and implications/loss, for example, and suitable time margins in the itinerary have been considered.

It is strongly recommended that onward travel should include overnight stopovers to ensure reasonable time to make connections given potential delays due to adverse weather, etc. 'Through tickets' can place a degree of obligation/responsibility on airlines but the terms should be clarified at or before time of booking and contingency plans must be considered during the planning stages.

When a group divides for transport reasons, the vehicle(s) registration number(s), passenger lists for each vehicle(s) and route plan need to be supplied to the Emergency Base Contact. Separate vehicles need Deputy Leaders in each with duplicate visit packs, working under an agreed communication and liaising management plan. All members of the group should carry full contact information and procedures to be following in case they become separated/lost.

Transport providers can potentially provide additional support for school/education groups if requested. Transport for London may be able to help guide groups to and from tube trains, stations and through ticket barriers. They may also be able to add value to the visit by having first-hand contact with the people involved in managing the facilities. Contacting the provider in advance to explore options is recommended.

Learning from incidents suggests it can be safer to arrive at a destination and related accommodation during daylight hours. Arriving late may increase some risks associated with the group's safety; this is particularly relevant when travelling in developing countries.

6.7.1 Risk Assessing Transport Arrangements

Transport arrangements are an essential part of the visit or venture's risk assessment considerations. This is particularly true where long distances are concerned. Good operating procedures and management of transport are essential, as is choosing a reputable and

known company. Consideration should be given to what action would be taken if a breakdown or long delay were to occur, as well as incident and emergency procedures. The Education Office provides generic risk assessments for travel and it is recommended that these be used as the starting point for the specific risk assessment/s.

Procedures for various different forms of travel follow:

6.7.1.1 Air Travel

Taking a group through an airport, customs and then flying takes careful planning and preparation. Only leaders experienced themselves in air travel should consider it.

Considerations are straightforward, but require attention:

- Limits on luggage on and inside the plane need to be planned for
- Constraints on what can be carried (in the hold and into the departures lounge) mean that, for children and young people, items such as cap guns, batteries, scissors (even nail clippers), aerosols and containers with liquids/creams may be banned/restricted. They (and their parents/carers) need to be advised/reminded/briefed appropriately
- Special meals or diets need to be ordered in advance and allergies need to be considered
- In-flight activity can be made available and it is recommended to consider some structured ideas of things for the group to do
- It may be possible to request that a member of the cabin crew be assigned to look after a group's needs, or a particular child/young person's needs
- Wheelchair/special assistance services need to be booked well in advance and may require extra time to be allowed
- Movement, noise levels, eating, etc. all need to be part of an agreed code of conduct
- Movement around airports can be problematic. Direct supervision strategies should be considered and agreements made for meeting places, boundaries, head counts/registrations and reporting numbers to the Visit Leader

This information is in place to supplement the generic risk assessment on air travel.

6.7.1.2 Ferries, Boats and Ships

By virtue of the closeness of deep water, ships are hazardous for groups to use. They have more freedom of movement than most other forms of transport and can provide educational activities in their own right. However, they must be carefully and appropriately managed.

The generic guidance below needs to be applied to the group concerned, in accordance with their age and experience and the leaders expectation of their behaviour:

- A code of conduct and operating procedures must be agreed and everyone should understand their roles and responsibilities
- Supervision strategies should start with small groups of children and young people under the care of a specific leader, these leaders in turn reporting their head counts and other information through to the next tier of supervision or group leader in a pyramidal structure
- A group base should be established and booked with the company. The more exclusive to the group that this can be made the better. Movement from this base should only be by agreement with the leader concerned (not indirectly to others, for example)
- Out-of-bounds areas should be established and each group walked through the boundaries set and locations to be used
- Always being in a group, and the size of that group, can be a critical factor
- The Visit Leader or their representative must always be in an agreed place, normally the group base
- The vessel's communications system for messages should be known and the group should introduce themselves on arrival to key personnel (having pre-booked and discussed their needs)
- Everyone should know what to do and where to go in an emergency
- Access to alcohol needs to be assertively forbidden

The key systems to be known:

- Emergency siren system
- Muster station procedures
- That a member of the crew will take charge

It is often possible to have a video shown to cover the above points and other features and procedures.

Security arrangements, particularly overnight, is very important if cabins are used. The use of such vessels by well-managed groups where everyone knows their roles and responsibilities is well-established and successful. Issues have, however, occurred where poor behaviour is not well managed. Such issues must be addressed.

Many ferry companies (including Condor) have a set of procedures that you can request for group bookings with specific arrangements and processes in place for these. This information is in place to supplement the generic risk assessment on ferry travel.

Establishments must request confirmation from the transport provider that sufficient lifejackets are available. The minimum requirement for ferries/ships is that there must be

sufficient child lifejackets equal to at least 10% of the number of passengers on board. This could, therefore, lead to a shortfall if large groups of children travel.

If you believe the ferry may not have appropriate safety equipment, is overloaded or is not seaworthy, do not get on. These aspects are particularly relevant for visits outside Europe.

6.7.1.3 Coach Travel

This is often the most convenient and/or cost-effective mode of transport for larger groups. They can be kept together in one place and be relatively easily supervised. All coaches in the UK are now required to be fitted with seatbelts when carrying children and young people. Where fitted it is essential that the use of seatbelts is maintained across the entire group, including leaders. The law only requires the fitting of lap belts and few coaches are available with three-point belts.

- It is the responsibility of the leader to ensure that seatbelts and lap restraints are in use, particularly at the start of any journey and following any stops
- Supervising staff should be spread throughout the coach and must also use their seatbelts. Where seatbelts are fitted, the number of passengers (of any age) cannot exceed the number of seats, or usable seatbelts (e.g. if they are broken the seat is unusable)
- When a group splits for transport reasons, the vehicle(s) registration number(s), passenger lists for each vehicle(s) and route plan need to be supplied to the Emergency Base Contact. Separate vehicles need Deputy Leaders in each, with duplicate visit packs, working under an agreed communication and liaison management plan

It is also sensible to:

- Note the position of emergency doors and exits and ask for them to be checked
- Make sure everyone knows what to do in an emergency - try to sit leaders or responsible young people close to the emergency exits and by the driver (to avoid distractions)
- Agree times for food and drink on the journey in advance and have a system for collecting litter
- Select good meeting/collection points for getting on and off. Be aware of the hazards of coach parks and service stations. Try to park next to a pedestrian area or easily supervised location
- Plan toilet stops

Buses and coaches should only be booked from reputable companies. There is more information on selecting appropriate providers in National Guidance documents 4.5e 'Hiring

a Coach' 4.5f Checklist and 4.4f 'Checklist assessing a provider'. For more details see <https://oeapng.info/downloads/good-practice/>

Long coach journeys and travelling abroad by coach:

- It is essential to check that the company concerned has the appropriate experience and coaches for these ventures. Where the tour operator organises the coach travel, similar reassurances should be made. Try to use recommended (by similar establishments) or previously used companies. Ask for and contact a recent user, and get some reassurances about language barriers that may occur between you and your drivers

Some of the issues to consider are:

- Whether modern long-distance coaches are used, with seatbelts and full facilities: toilets, videos, etc.
- Whether drivers are appropriately recruited, e.g. checks on criminal records, employment history, etc.
- Whether driver names are clear and the regulations about driving hours and similar are known
- The number of seats is suitable, not just for numbers but for storage of luggage (which should be packed/stowed by the driver) and equipment, especially for:
 - Ski holidays
 - Music tours

Similar ventures with considerable luggage will require extra storage, above and beyond the normal, e.g. extra empty seats and/or a trailer

- Carefully consider any constraints which may result in significant difficulties, such as only mid-sized cases being able to be taken on a ski trip
- Drivers need to be adequately trained for likely road conditions (e.g. snow/ice etc.) and coaches appropriately equipped.
- Driver competency and general attitude and behaviour should be monitored. Whilst there are many good drivers, leaders should make their own judgements and intervene where necessary, even if this results in disruption to the journey. The duty of care to the group is paramount. Any concerns should be raised early, including issues involving the driver's attitude to children, and behaviour such as mobile phone use whilst driving, etc.
- Be very aware if specialist or pre-agreed coaches are replaced at short notice. The comfort of the group on long journeys is essential
- Where you are asked to join with another group by your tour operator, make every effort to find out who they are and to agree joint behaviour and operating procedures

It is inadvisable to consider sub-letting places on the coach to others, unless they are another compatible educational establishment and the objectives are similar. This could compromise the indemnity and insurance arrangements.

This information is in place to supplement the generic risk assessment on coach travel.

6.7.1.4 Public Transport

This can be effective, particularly outside of rush hours. It may also constitute an educational purpose that the establishment feels is of value. Common-sense operating procedures should be considered and managed by everyone concerned:

- Research/and plan payment/ticketing methods - many providers will not permit payment on board. Where payment on board is an option, pre-collect fares for payment unless this is part of the educational objective
- Appropriate supervision must meet the ratios given in that section. Leaders should be well spaced out along the bus and both up and down stairs
- A code of behaviour must be agreed prior to travelling and be realistic in use, including noise levels, movement, respect for other passengers, eating and drinking
- Regular head counts are needed, in particular just before and after getting on and off
- When a group separates for transport reasons, the vehicle(s) registration number(s), passenger lists for each vehicle(s) and route plan need to be supplied to the Emergency Base Contact. Separate vehicles/planes/trains/vessels etc. need Deputy Leaders in each with duplicate visit packs, working under an agreed communication and liaising management plan
- Any equipment and personal baggage taken should be stored carefully and out of the way of others
- Supervise getting off buses particularly carefully and ensure that the bus has stopped moving. Before getting off, check that there is a space for the group to move to once off and check that no-one is left aboard
- Meeting/collection points must be able to cope safely with the age, experience and number concerned and not present a hazard, such as being close to the road edge

The use of public transport can raise issues with parents/carers, who compare them with coach journeys, e.g. the presence or lack of seatbelts. The establishment should have a clear rationale for using such transport (and it should be clear in the letter home to parents/carers that this is the case) and be able to explain its risk assessment and control measures, i.e. the guidance above, and those specific to the group and its sites.

6.7.1.5 Rail Travel

This is undoubtedly one of the swiftest means of transport, providing of course that it is accessible without too much additional organisation and transportation. Costs can also be a consideration, although planning and booking ahead can produce favourable reductions – noting that in some instances the cheapest fares may apply only to specific services.

Major considerations include:

- Entry to and exit from the particular stations need to be planned in order to keep the group together, in particular when moving through busy locations
- Platform waiting times should be kept to a minimum and this may require a suitable waiting area nearby being established
- Reserved seats and carriages are important for supervision and keeping the group together
- A code of conduct and good discipline are essential, given the potential dangers
- Keeping the group away from platform edges (use the lines provided)
- Always wait until the train stops and then give a clear signal to the group to move forward or disembark
- Do not allow the group to touch carriage doors or lean out of the windows when the train is moving
- Take extra care where there is a gap between coach and platform. Some members of the group may need assistance
- Luggage should be stored safely and securely and a quick check made by the Leader
- Make the group aware of basic hazards or issues, such as: stranger danger, hot drinks, litter, toilet use
- Agree a code of conduct to cover movements, noise levels, respect for other passengers and eating and drinking, as well as general behaviour

6.7.1.6 Underground Trains/Tube

Even those who know the system well will accept that this can be a problematic and potentially more hazardous means of transport than others. Newer stations and trains can be very good, but managing the overall situation is difficult and must not be entered into without thorough planning and briefing:

- A code of conduct (as above) and operating procedures need to be carefully agreed, in particular for those who are not acquainted with the system. It should be described and illustrated. The stations are noisy and crowded, and not like other railway stations
- The operating procedures need to dictate how, where and when group members respond to Leader directions and directives

- The group must know what to do if something goes wrong. (Picture the children/young people moving off behind the closed doors of the wrong train – will the procedures cope?)

It is recommended that the Visit Leader should:

- Purchase tickets in advance
- Avoid rush hour periods
- Have very small groups, each with a designated Leader
- Take care on escalators or lifts – supervision must be direct and effective
- Move from one designated waiting point to your next designated waiting point, i.e. more secure locations
- Practice good platform control and operating procedures (refer to Section 6.7.1.5 on Rail Travel above)
- Brief the children/young people on the route and what is likely to happen
- Have an agreed Plan B in the event of a group or individual getting split up – where to meet – at the next stop/final destination?
- Have clear supervision and management strategies in place. For example, the group leader may determine that the first person on should be the group leader, last person on is another supervising adult.

This information is in place to supplement the generic risk assessment on rail travel provided in Section 6.7.1.5.

6.7.1.7 Self-Drive

Please also refer to [Section 6.7 Travel and Transport](#)

All self-drive is an acknowledged significant risk. The following best practice guidance for self-drive transport may assist in the planning and preparation of visits. Informed consent from parents/carers can only be considered granted if written details of the named drivers and the journey to be undertaken is included in the information provided to them. The generic risk assessment should be made visit specific. As a minimum the EVC and Visit Leader should consider:

- The driver/s' valid and appropriate driving licence
- Any medication or conditions of the driver/s won't impact on ability or the insurance of the vehicle. If any doubt, in advance of the visit the drivers must get written assurance from their GP as evidence that their condition/medication will not affect their ability to drive the vehicle with passengers
- The previous experience of the driver/s for the task e.g. motorways, cities, minibus fully loaded, remote and rural countryside, European/UK, etc. and how recently this was
- The likely route and driving time for the route

- The rest stops
- That the driver/s have had sufficient rest prior to the drive, i.e. not at the end of a busy working day
- That the vehicle is fit for purpose and appropriate for the proposed task

The driver of any vehicle transporting children or young people cannot drive and supervise at the same time. Therefore a judgement needs to be made about the likely behaviour and individual needs of the passengers. If any of the children or young people may require close supervision, then another adult must travel in the vehicle so that the driver is not distracted.

Education Resources and Estates Management does not check any of the above, nor does final approval relate to the self-drive transport arrangements of visits, this is the responsibility of the school/service. Furthermore, Education Resources and Estates Management has no policy or mechanism at present for testing the competence of drivers. Establishments therefore need to take appropriate steps to check the competence and currency of each driver in respect of their ability to drive such a vehicle safely (e.g. how often have they driven such a vehicle and when/where this was).

When checking staff's Guernsey driving licences you also must inspect for endorsements. If there are current offences the Guernsey plastic card section should have an 'E' symbol in the corner and the paper counterpart (which must also be checked) lists the endorsements for traffic offences, etc., which stay on a licence for 5 years. If there are any concerns about the type, nature and severity of offences, the school must seek further guidance from the OEA.

Non-employees can be insured to drive vehicles belonging to Education Resources and Estates Management with approval from the OEA. Further information (including a '[School Minibus Pre-Drive Safety Check](#)' and '[The Minibus Code of Practice](#)') can be found at www.rosipa.com.

Please refer to OEAP National Guidance <http://oeapng.info> specifically '[Transport in minibuses](#)'.

6.8 Food and hydration

Healthy affordable regular meals/food and hydration must form part of the planning for all journeys. If staff are handling or preparing food they should complete the level 2 food hygiene course. An online version of this is available via the Health and Safety Officer.

6.9 Accommodation

The provision of all accommodation must be checked using [OEAP form 8q](#) unless it is:

- Arranged by a Quality Badge Provider (refer to [Section 6.4 Quality Badge Scheme and Third Party Providers](#))
- Licensed with the Adventure Activities Licensing Scheme (AALS)
- A [U.K. YHA](#) Youth Hostel

A copy of the completed form must be included with the final approval. Please contact the OEA if the provider cannot agree to all of the points that are within their expected provision. When providers are used for residential visits, the School Travel Forum assured members system completes regular audits to an agreed standard for the accommodation provided.

However, for visits where the school arranges the accommodation there are no such assurances. The [OEAP form 8g](#) achieves a limited check but when Visit Leaders arrive at the accommodation they must satisfy themselves that the standards and management arrangements are appropriate. It is recommended that a pre-visit inspection be undertaken. Showering/toileting/hygiene must be facilitated with dignity, privacy and decency, staff must manage the group and the use of facilities to accommodate this.

Hotels are not necessarily appropriate for school visits and especially for groups of children aged less than 16 years. Indeed many hotel managers are concerned regarding the security of school groups on their premises. Careful consideration must be given to room arrangements which, as far as possible, should be away from any main areas of foot traffic and activity. Wherever possible, rooms should be booked that are close to one another ensuring the group is kept in a defined area. The Visit Leader should also consider the locking of the rooms and teacher access so that learners can't restrict teacher entry. It is therefore expected that the Visit Leader, when selecting accommodation, will consider first the option of using a Youth Hostel. They have mostly been upgraded in recent years and staff can often have ensuite rooms. Many of our school visits use Youth Hostels in UK and Europe.

Using Youth Hostels can have the following advantages:

- Cheaper accommodation and meals
- Authorised entry systems/better security in respect of strangers on premises
- Child-friendly environment
- Child-friendly meals with choices
- Self-catering or making own drinks if wished
- Social areas for downtime rather than being in hotel bedrooms
- Games area in some hostels
- Secure outdoor areas in many hostels
- Reductions at local visitor attractions
- Provide experience for future independent travel

Education Resources and Estates Management has a corporate YHA membership that should help to reduce costs.

All of these benefits should provide greater assurance and comfort for the staff team. It is, however, understood that there may not be a Youth Hostel in the vicinity or it may be full. In this case there must be an **evident selection procedure for the accommodation that is appropriate for the group.**

Sleepovers in schools (or other equivalent style accommodation) can be a good way to introduce primary learners to residential visits. Considerations include:

- On-site security - not just of valuables but of all those involved (learners and staff). For example, how will visitors/other users on the site/in the building be controlled?
- Ensuring that everyone is aware fully briefed of the specific fire procedures is a priority – making sure fire exits are not locked at night or blocked off (location and access of exits), fire alarms, muster points, emergency lighting. Everyone should consider taking torches as a school is only a temporary accommodation and is unlikely to meet the same standards as a permanent hotel, etc.
- The way the sleeping plan is organised on the floor and kit/bag storage in the room needs consideration as these could be trip hazards in a dark unfamiliar room. Linked to this are privacy arrangements and staff gender balance and sleeping arrangements. Changing, washing and toilet facilities and associated procedures must be considered, possibly using a buddy system if appropriate.
- A policy should be in place in respect of the use/monitoring/restrictions of social media and camera-phones.
- Dynamic risk assessment of the room - what other furniture/fixtures in there that might present a hazard? Are chairs stacked up in a dangerous way, what is on the tables or in the drawers in the room, etc.?
- Careful familiarisation and briefings for the group on the school and its immediate location are all factors that need to be considered and included in briefings/ground rules, e.g. boundaries must be agreed
- Sleeping on the floor could add to the tiredness of learners – so this needs consideration in relation to the next morning's activities
- The emergency services (specifically fire and police) need to know about sleepovers as they will respond differently to a fire/call-out if they know people are sleeping on the site and the use of torches/lights on in the building may imply there are intruders
- Liaise with the caretaker (and/or Education Estates Team) to ensure things like heating, locked doors/access, security systems, closed windows, etc. will not present any unforeseen problems

On-site catering needs planning too: hot food management, areas for eating and the management of the movement of learners during this time may need extra planning. Any issues regarding accommodation must be discussed at Initial Approval with the EVC, who can liaise with the OEA.

6.10 Remote Supervision

The information regarding supervision in the OEAP National Guidance must be considered by the Visit Leader. The purpose for the inclusion of remote supervision in the itinerary will inform the approval. The Visit Leader and Headteacher/EVC will need to consider:

- The proposed aims and educational benefits of remote supervision
- The previous experience of the individuals
- Their age and competence
- The staff knowledge and experience of the individuals
- The staff profile
- The location
- The staff knowledge of the location
- The time of day
- The restricted area (boundaries set)
- The recall arrangement
- The staff deployment in the vicinity

The key question is: would the proposal constitute ‘reasonable care’ within a court of law?

The plan for remote supervision on a visit needs to be included in the written information sent to parents/carers. The itinerary will clearly identify all inclusion of remote supervision and the control measures will be noted in the risk benefit assessment or event specific notes.

Remote supervision must be for educational/learning reasons only; it is not acceptable to leave learners in accommodation or in the evenings using remote supervision as a management tool.

6.11 Informed Parental Consent

As well as using the generic consent form, written information must be given to parents/carers about the visit sufficiently in advance to give them the opportunity to raise any issues with the Establishment before departure. This may be supported by holding a visit information meeting with parents/carers and learners. A copy of all information sent to parents/carers about the visit should be included in the final approval submission. Including an itinerary of the visit with the letter home can help provide clarity for

parents/carers. The EV3 form can help capture and collate information (home contacts, medical, etc.) so that it is in a quick to view format.

Where complex medical/disability conditions are identified schools must look at these cases individually considering the following:

- Fitness to travel confirmation from the person's doctor/medical professional. Does the doctor agree that it is safe to travel? The student/youth must not travel against the advice of a medical practitioner. This is a standard requirement under Insurance, so documented medical approval must be obtained prior to any financial commitment, or commencement of the visit, as appropriate.
- Parents/carers – do they understand the risks involved and are they happy with it? Have they provided confirmation in writing explicit for informed consent?
- Risk assessment must be carried out in respect of travel, accommodation and activities undertaken whilst away. A specific management plan (including an individual care plan) is key to this.
- What assistance is there on the journey and at the destination in terms of support (medical) should the person need emergency assistance, such as hospital A&E or specialist care more appropriate to the individual's condition? Is this easily accessible within a reasonable timeframe? Remote places with no access (within a reasonable timeframe and relevant to the individuals condition) to emergency medical care must be avoided.
- Insurance – this is critical, what is the Insurer's view on this? All such cases must be referred to the Administration & Procurement Manager, Education Resources and Estates Management, for evaluation by the underwriter, who may adjust the terms of the cover and/or adjust the financial elements. The information required to be submitted to the Administration & Procurement Manager is:
 - Description of the individual's condition(s)
 - Any narrative from the individual's GP/specialist
 - An outline of proposed location(s) and level of access to appropriate/sufficient medical professionals and facilities
 - Risk assessment(s) for the individual in relation to any activities

6.12 Visits with a Mixed Age Group

When a visit includes a group of adults with young people less than 18 years of age, e.g. course groups from the CFE, those under 18 years will be identified separately during the approval submission. Consideration needs to be given to the duty of care for these identified young people within the visit itinerary. It may mean that there are different expectations, requirements and supervision for these students. Schools may consider managing all learners as if they are under 18 years, i.e. no adult rights or have very specific agreed conduct codes in place.

6.13 Emergency Base Contact

Please see [Section 3.16 Emergency Contact Information](#)

6.14 Final Approval

Once the Visit Leader is satisfied that this planning and preparation is complete, this should be approved through the online visit approval system. The complete final approval submission will then be checked by the EVC and Headteacher for their final approval. Once this has been done the same submission will be forwarded to the OEA for final approval **at least 4 weeks before departure.**

Education Resources and Estate Management may attach specific conditions to the final visit approval being granted, usually using EVOLEvisits to communicate this. Conditional approval is used to help expedite the schools final planning and preparation. Where conditions are used, the responsibility for the implementation of the associated safety conditions sits directly with the Headteacher who must ensure all the requirements are appropriately actioned. Increased monitoring by Education Resources and Estate Management may be implemented in these cases to check on compliance.

For a typical visit all sections of the visit approval submission will need to be completed in full. In addition to completion of the online form, the following information must also be uploaded in EVOLVEvisits:

- Evidence of informed parental consent e.g. letter to parents/carers
- Itinerary
- Generic and specific risk assessments
- Any visit-specific information
- EV3 Summary of participants (if not included in register)
- Provider form (OEAP form 8q)

There are additional information requirements for specific visits, which are outlined in the following sections.

6.15 Alterations to Visits after Final Approval (including date changes due to weather)

Significant changes e.g. staff, pupil numbers, ratios, activities, travel details/dates, and itinerary must be recorded via EVOLVEvisits. These should be reviewed by the EVC/Headteacher/OEA as appropriate.

Please note that these changes may mean that the risk management needs to be reviewed and parents/carers must be kept informed for consent purposes. Journey insurance will have to be amended separately with the Administration & Procurement Manager.

6.16 Residential Visits to Lihou Island and Visits to Herm

6.16.1 Lihou Island Residential Visits

This guidance is provided to assist Headteachers/EVCs and Visit Leaders in making the necessary planning and preparation arrangements ahead of a visit. The Headteacher or EVC must be confident that the Visit Leader and staff team for visits to Lihou Island have sufficient competence to manage in this remote coastal environment where access/egress is limited and reliant on the tidal causeway being open.

The Committee *for the Environment & Infrastructure's* "Lihou Causeway Opening Times" are the only official reference for safe crossing details and must be used for gaining current information. It is available at <https://www.gov.gg/lihou>, published in the Guernsey Press and posted on the notice board at the start of the Causeway.

The Visit Leader must have completed the Coastal and Countryside course (or other equivalent training) and understand their role and responsibilities whilst being confident of managing the group under these conditions. She/he must have made a preliminary visit to the house and understand all of the daily maintenance and emergency procedures. The support staff should have visited Lihou Island on a previous occasion; they will feel comfortable being part of the supervising team with the known group.

Shoreline activities will need a member of staff with the Emergency Response Activity Supervisor Award (ERAS), the National Water Safety Management Programme (NWSMP) award or an agreed equivalent or higher competency.

The Lihou Charitable Trust (LCT) is approved by Education Resources and Estates Management as a provider. If the Warden is included in the minimum staffing ratios, the Warden needs to be resident on the Island throughout the duration of the visit and their name must be included on submission for approval.

There is an expectation that all of this guidance will be followed by the Visit Leader. When requesting final approval, the OEA will look to the planning and preparation submission for evidence of:

- Informed parental consent that is specific to the itinerary (clearly identifying any remote supervision, water or adventurous activities).
- Medical and contact information for each learner must be added to EVOLVEvisits, a separate form with details of staff relevant medical and emergency contact details will need to be uploaded to EVOLVEvisits
- Itinerary (detailing the programme and activities for the visit)
- Identification and review of generic risk assessment referencing the appropriate Education Resources and Estates Management and LCT risk assessments.

- Risk Benefit form EV4 or Event Specific Notes. This should be linked to the itinerary and cover specific details (that are outside of the generic risk assessments) with regard to the group and its management. Form EV4 is a risk assessment of the whole visit; it wraps up the areas that generic risk assessments don't cover. It would normally include supervision information of the group. This is true of the group in the evenings too, and it should cover planned activities at this time. The generic risk assessments cover certain aspects of a visit but there remain specifics that might be to do with the nature of the group you are taking, or that might be to do with specifics of the visit, behaviour, medical, general supervision etc. The completed EV4 may end up being brief (as you may be using generics for much of the visit) but Education Resources and Estates Management will require evidence that these areas have been covered
- Sample EV4 forms are available from the resources area on EVOLVEvisits
- The Appointed Person for First Aid must have a current first aid certificate (minimum 1 day 'Emergency First Aid' course)
- Details of remote supervision management including location, conditions, boundaries, communication, staff management, recall arrangements, etc.
- Sea swimming (category B activity) – only current qualified competent supervisors complying with the code of practice and using the LCT Venus Pool specific risk assessment with dynamic risk assessment during the activity. As with all activities the group need to use appropriate equipment, which can be loaned from the Education Resources and Estates Management (via the Outdoor Education Officer).
- Beach visits - for all visits using the beaches the Visit Leader must include as part of their risk management: tide times; tidal state during visit; weather conditions; use of throw bag. Dynamic assessment is expected at all times and group location on the beach is a consideration that must be identified

In addition to the above, please consider that Plan B options should be identified as weather conditions at this exposed location can impact on plans. The Lihou Island website (<http://www.lihouisland.com/>) can be used as an information resource and for general island guidance.

6.16.2 Herm (Day Trips and Residentials)

This guidance is provided to assist Headteachers/EVCs and Visit Leaders in making the necessary planning and preparation arrangements ahead of a visit. The Headteacher or EVC must be confident that the Visit Leader and staff team for visits to Herm Island have sufficient competence to manage in this remote coastal environment with access/egress limited and reliant on scheduled ferries.

The Visit Leader must have completed the Coastal and Countryside (or other equivalent training) course and understand their role and responsibilities whilst being confident of

managing the group under these conditions. Support staff should have visited Herm on a previous occasion; they will feel comfortable being part of the supervising team with the known group. When requesting final approval the OEA will look to the planning and preparation submission for evidence of:

- Informed parental consent (specific to the itinerary). The school must ensure they have current relevant medical/behavioural and emergency contact details for staff and learners.
- A full itinerary, detailing the programme and activities for the day
- Risk Benefit assessment has been completed
- Generic risk assessment have been reviewed, shared and acknowledged by identifying them on EVOLVEvisits (see also Generic Herm Island visit Risk Assessment)
- The Appointed Person for First Aid will have a current first aid certificate (minimum 1 day Emergency First Aid course)
- Details of remote supervision management including location, conditions, boundaries, communication, staff management, recall arrangements, etc.
- If cliff paths (category B area) are used then recognition that this is an additional risk and assessments and route plan outlined by marking and annotating the route on a map (this as per 'Coast and Countryside' booklet resource provided on the training)
- Sea swimming (category B activity) - only current qualified competent supervisors complying with the code of practice and using Bay-Specific risk assessments with dynamic risk assessment during the activity. As with all activities, the group needs to use appropriate equipment, which can be loaned from Education Resources and Estate Management
- Orienteering - the supervisor leading this should have completed the Education Resources and Estate Management training course (or agreed equivalent). The Herm courses are part of a progressional programme of learning, learners should have had an initial orienteering experience prior to using these areas. This resource must be booked via the Outdoor Education Advisor in advance. There is a generic risk assessment for this available to download from [EVOLVEvisits](#)
- Beach visits - for all visits using the beaches the Visit Leader must include as part of their risk management a specific beach risk assessment that includes: up to date tide times, tidal state during visit, weather conditions, use of throw bag. Dynamic assessment is expected at all times.
- Herm is an exposed environment with little shelter from the elements, in particular the sun. Careful consideration must therefore be given to protection, hydration, etc. The relevant [Sun Safe Policy](#) must be followed.

In addition to the above, please consider that Plan B options should be identified as weather conditions at this exposed location can impact on plans. The sand dunes area in the North is

a fragile environment and controls must be in place to respect and conserve this sensitive area.

Herm Island office in the harbour area can be used as an information resource and for general island guidance. Visit Leaders should keep the phone number (01481 722377) with them. The out of hours contact is 01481 750075 (Hotel Reception). The First Aid number is 07781 460542. Further information is available from the Herm Island Office. Please check that these numbers are current before going.

6.17 Visits Shared with Other Schools/Federation

When schools are working together to offer a combined visit there will be a Visit Leader from each school but one teacher will be the overall Visit Leader. This person will manage the approval process with their school EVC. The Visit Leader's school will complete the initial approval. The Headteacher/EVC from each school will check the complete submission for final approval before it is sent to the OEA.

The Emergency Base Contact must ensure that they have current 24-hour contact information for a senior staff member for each of the schools involved. If a school is not sending a representative of its staff on the visit (this is only permitted in exceptional circumstances e.g. possibly when only one or a few of its learners are attending a Federation trip), the visit staff must be in agreement and have knowledge and experience (possibly acquired during the lead-up to a trip through preparation and team training, etc.) of all learners in the group. Consideration must have been given to this in a risk assessment and at senior leadership level in the schools.

Shared visits between any of the grant-aided colleges and States' high schools need additional considerations. The insurance cover and limitations must be very clear to all. Responsibilities regarding supervision arrangements for the learners outside of the high schools must be clearly agreed. Plans to accommodate a sick (or injured) member of staff or learners from the grant-aided schools must be in place. Parents/carers must have clearly consented to the joint visit.

The grant-aided colleges do not use EVOLVEvisits for visit management. Planning and preparation evidence/documents must be shared in another way (e.g. via email/attachment). The lead school will need to attach evidence of the grant-aided school EVC approval to the EVOLVEvisits form.

Self-led adventurous activity visits cannot be shared with grant-aided colleges, for example DofE groups combined with the colleges and the high schools.

6.18 Learner Exchange Visits/Host Families/Home Stays

The single most effective way of understanding a different country, culture or language is to experience it first-hand. Given our dependence on a global economy, an understanding of the wider world has never been more important. An exchange visit involving the placing of young people in a family home stay setting has traditionally been seen as one of the best ways of enabling this.

Such experiences help young people to develop self-esteem, self-confidence and independence, while developing their knowledge base and broadening their horizons. Staying with a host family gives young people both an insight into the culture and a first-hand opportunity to use their language skills in a real context.

Home stays may also take place between host families in the UK to provide young people with accommodation during a visit.

6.18.1 Management arrangements

Exchange and home stays visits must be planned, prepared and managed in accordance with the current National Guidance documents including 'Exchanges and Home Stays', available on the National Guidance website www.oeapng.info. The only exception is that Education Resources and Estates Management does not require Disclosure and Barring Service (DBS) checks on UK and Guernsey families that host learners as part of exchange and home stay visits (this is not a statutory requirement in Guernsey).

Education Resources and Estates Management acknowledges that:

- A DBS check, in itself, is no guarantee as to the suitability of an individual to work with young or vulnerable people (nor are DBS or equivalent checks, available in many foreign jurisdictions);
- DBS checks should only ever form part of safeguarding processes (e.g. in addition to references, interview, induction, monitoring, etc.);
- DBS checks are only as useful as the information authorities can access on offenders, criminal activity or known persons (by their very nature, first-time offenders may not be identified, which is a limiting factor).

The placement of an adult in a situation of professional trust with young or vulnerable people must always be subject to a robust engagement process. For this reason, and for consistency and clarity of processes, when host families are used to provide young people with accommodation during a visit, the school has a duty to take all reasonable steps to ensure that learners are placed in appropriate homes. The school must also be able to evidence that it has applied due diligence to the selection process of host families. If there is any doubt in the ability to do this, they must consider whether the visit should take place.

Vetting, family matching and safety procedures are outlined in this document (informed by National Guidance documents which contain further useful details).

6.18.2 Supervision

Young people are not directly supervised by the Visit Leader whilst they are with host families. Therefore, home stays require careful planning to ensure everyone involved is clear about both their responsibilities and the supervision arrangements. It is essential that all parties involved fully understand the management and supervision arrangements and are clear about who is responsible for what and when (schools retain a non-delegable duty of care). Young people must be appropriately supervised throughout and parents/carers must be able to give, or withhold, consent based on a clear understanding of how the visit will be managed. Remote supervision requires clear boundaries and guidelines so that the Visit Leader knows and agrees the intentions/locations of the learners at all times. Consideration of the day to day management of this (e.g. checking in with the leader/logging locations, buddy systems etc.) must be included in the planning.

6.18.3 Key Questions

Schools must be able to demonstrate that they have collated and acted on the following key questions (using the current National Guidance forms, documents and information can help this):

- Are families and young people carefully matched for gender, age, diet, religious belief, special needs etc.?
- Are families known to the host school?
- Has the host school confirmed the families as suitable and is there a hosting agreement form that includes a question about criminal convictions or other contra-indicators?
- In case it is necessary to move a young person at short notice, are contingency plans in place?
- Has consideration been given to the safety and wellbeing of the young people during travel, and does this include appropriate drivers and transport whilst with the host family?
- Are young people and host families aware of a 24-hour contact number and are they fully briefed as to procedures should problems arise?
- Do leaders have daily contact with all young people?
- Do young people have an agreed 'keyword' that they can use which means 'I want you to visit me immediately'?
- Will young people have access to a mobile phone to call or send text messages to their school staff (considerations include connectivity/roaming/credit, battery charge)?

- Have the young people and their parents/carers been briefed about personal safety, and have they been issued with written guidance on this topic?
- Does work experience feature as part of the exchange and if so, has an assessment been made by an appropriately competent person about any significant hazards the work environment may present?
- Have “acceptable” and “unacceptable” activities on ‘family days’ been discussed and has parental agreement been sought prior to the visit e.g. is there an opportunity to go cycling or horse riding, or a visit to a beach with swimming? If such activities are to form part of the experience, parental consent is required. Any activities must also be included in the itinerary so that insurance implications can also be captured.

6.18.4 Communication

Parents/carers must be informed of the checks (and their limitations) in place, potentially this will be at parents' evening but in the least it must be documented in a letter home. This is so that they are aware of how host family risks are being managed (e.g. DBS checks have not been completed), and to ensure they are consenting to the selection process that has placed their child with the host family.

It is critical that local school ensure that the overseas host school, or agency has an equivalent or uses the same vetting procedure outlined here to assess the suitability of home placements. Using a provider or agency does not relieve a school/establishment of its responsibilities; in this case the school must work with the provider to ensure appropriate measures are in place.

Long-term relationships built over a period of time can help, as can encouraging correspondence between families, pen friend relationships and dialog between parents/carers. If the host school or placing agency/provider does not have appropriate measures in place for carrying out suitable and sufficient checks to ensure the health, safety and welfare of the young people, the School must seek further assurances and/or reconsider whether the visit should take place.

6.18.5 Vetting of Host Families

The vetting of host families must include:

- Verification of family structure
- Ensuring a Code of Conduct has been agreed
- Checking that House Rules are as agreed
- Home visit checks
- Ensuring that appropriate information is shared
- Checking the suitability and privacy of sleeping and toilet arrangements
- Ensuring that family activities fall within the scope of parental consent and insurance

- Transportation (including drivers) is suitable and covered by parental consent

6.18.6 The Visit

During the visit, the Visit Leader must monitor the host accommodation (even if only a sample) to ensure, as far as is reasonably practicable, the properties/families were correctly assessed and that this ties in with the original checks on the hosts. It is understandable that visit Staff may not be staying with host families; in these cases it is important that consideration has been given to the location (and distance) of the staff in relation to the learner accommodation, it is essential to help ensure staff assistance can be provided quickly if necessary.

6.18.7 Evaluation

Feedback and review must be built into the homestay/exchange arrangements. This should involve the young people, parents/carers, host families, staff, leaders and partner organisations, and can help with the celebration of success, as well as facilitating ongoing improvement and contributing to the planning of future visits. Any significant issues must be shared with the EVC, the Headteacher and the OEA.

6.18.8 Host Family Stay Information Form

The current relevant OEAP guidance documents and forms must be used, this includes [7f Exchanges and Home stays](#), [8b Home form exchange visits](#), [8i Model code of conduct](#) and the specific risk management mind map. More on the relevant documents can be found on the [OEAP National Guidance website](#).

6.19 Snowsports/Ski Visits

Snowsports and ski visits must be organised and led in compliance with the current OEAP guidance on [Snowsports](#). Staffing must be risk assessed and it is expected that 1:8 ratio is desirable due the more adventurous nature and higher risk of an accident (and the possible impact this would have on the group's activities). The itinerary should be carefully planned so that any evening/additional activities like ice skating are completed towards the end of the holiday (to lessen the impact of any injury). Helmets must be worn by both staff and learners during Snowsports activities. As outlined in the current OEAP Snowsports guidance, staff must work within the scope of their qualification; different jurisdictions have various penalties including prison and considerable fines for individuals (who would be personally liable) breaking the local laws.

6.20 Island Schools Sports Teams' Visits

The Headteacher of the school of the Visit Leader is asked to approve the form to endorse that the Visit Leader is, in his/her opinion, sufficiently experienced and trained to fulfil this role.

The same requirements for category C visits must be followed in relation to initial and final approval. The following additional tasks must also be completed:

- A pupil group list needs to be enclosed with the school of each pupil noted
- Where any part of the visit is in school time each Headteacher will be requested in writing to permit their pupil/s to join the visit. A copy of this letter and confirmation of Headteacher (or member of the school's Senior Leadership Team) permission must be enclosed with the final approval
- The completed form EV3 must be enclosed with the final approval for any participants not included in the online registers
- The Emergency Contact will be a Senior Leader/Manager from the school of the Visit Leader
- Final approval confirmation will be sent to the Visit Leader and all EVCs involved so that all are kept current on the visit

6.21 Duke of Edinburgh's Award Expeditions

There is a separate Code of Practice, forms and Award Expedition Guide for Duke of Edinburgh Award Expeditions available using the following link: [DofE](#). All Education establishment expeditions must complete the requirements for Category C off-Island visits with consideration to the whole visit itinerary and as well as the expedition phase. This must be uploaded to EVOLVEvisits in the usual way.

Expedition submissions for approval also go to the DofE Award Manager, or in their absence, to the Chief Executive Officer of the Youth Commission for consideration. The Duke of Edinburgh Code of Practice and associated form are available from the DofE Manager at the Guernsey Youth Commission.

6.22 Review and Evaluation of visits

All visits must be reviewed and evaluated by staff in a timely fashion and within 28 days of the visits return to the island. EVOLVEvisits has a function for this.

The 'Intended Outcomes' section of the visit form is the basis of Visit Evaluation function on EVOLVEvisits. A maximum of 4 Intended Outcomes are available.

Visit Evaluation on EVOLVEvisits can be carried out by either the visit leader or the EVC up to 28 days after the visit end date. Visit forms awaiting evaluation (after the visit date) can be found in the Evaluate tab on EVOLVEvisits and can be accessed by clicking on the 'Edit' (orange pencil icon). After 28 days, any comments made on the evaluation are locked and cannot be changed.

The initial questions are linked to the original outcomes which the leader identified. The comment box allows further annotation. 'Other comments' is possibly the most flexible section, given anything can go there.

The Evaluate function has been available since EVOLVEvisits has been in use by Education Resources and Estates Management and the system sends a reminder to staff following the completion of a visit. The Headteacher/EVC should check that this has been completed.

For more complex visits or those involving a near miss or where an incident has taken place a more thorough review could be attached as a word document to the EVOLVEvisits form after the event, in that respect it's not automated but in some cases (where there has been specific learning following an incident for example) it could be more appropriate.

Useful information which could inadvertently be lost due to staff changes or similar must be properly captured.

It is important to reflect on how the review and learning from previous years informed the visit planning and management, what changes were made and how learning for future visits might be instigated and communicated.

National Guidance documents [4.2c Reviewing](#) and [5.1d Evaluation](#) can help with reviewing and evaluating educational visits. For more information see <https://oeapng.info/category/evaluation/>

6.23 Outdoor Education Staff Training

It is important that all staff are suitably trained for visits; the Headteacher/EVC should therefore ensure that they are aware of the training programme and are encouraged/supported to attend training courses as appropriate.

Many Education Resources and Estates Management courses are centrally funded. NGB training and assessment courses are a requirement for many adventurous activities. The OEA can advise on appropriate technical qualifications for various adventure activities and visits that might involve travel in remote and or challenging locations.

Education Resources and Estates Management has access to adventure activity consultants as follows:

Paddlesports	Paul Donovan
Climbing	Mike Rosser/D'Arcy Brimson
Coasteering	D'Arcy Brimson
Swimming	Sheena Melrose/D'Arcy Brimson

Education Resources and Estates Management can arrange the following staff training courses throughout the year:

- Education Visits Co-ordinator
- Group Leader Training
- Outdoor Learning Cards Training
- Environmental Learning Cards training
- Coastal and Countryside Training
- Orienteering training for Primary and Secondary Schools
- Outdoor Learning Cards – Bouldering development
- Indoor Climbing Wall and Outdoor Rock Climbing training and assessments
- Sea swimming Supervisor Training and Assessment
- First Aid Training for Outdoor Activity Supervisors
- Bushcraft, earth, environmental and Forest schools type training

The above list is not exhaustive. Please contact the OEA for more information.

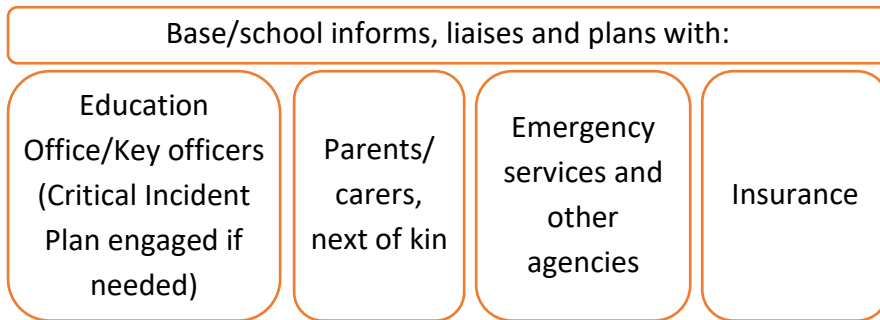
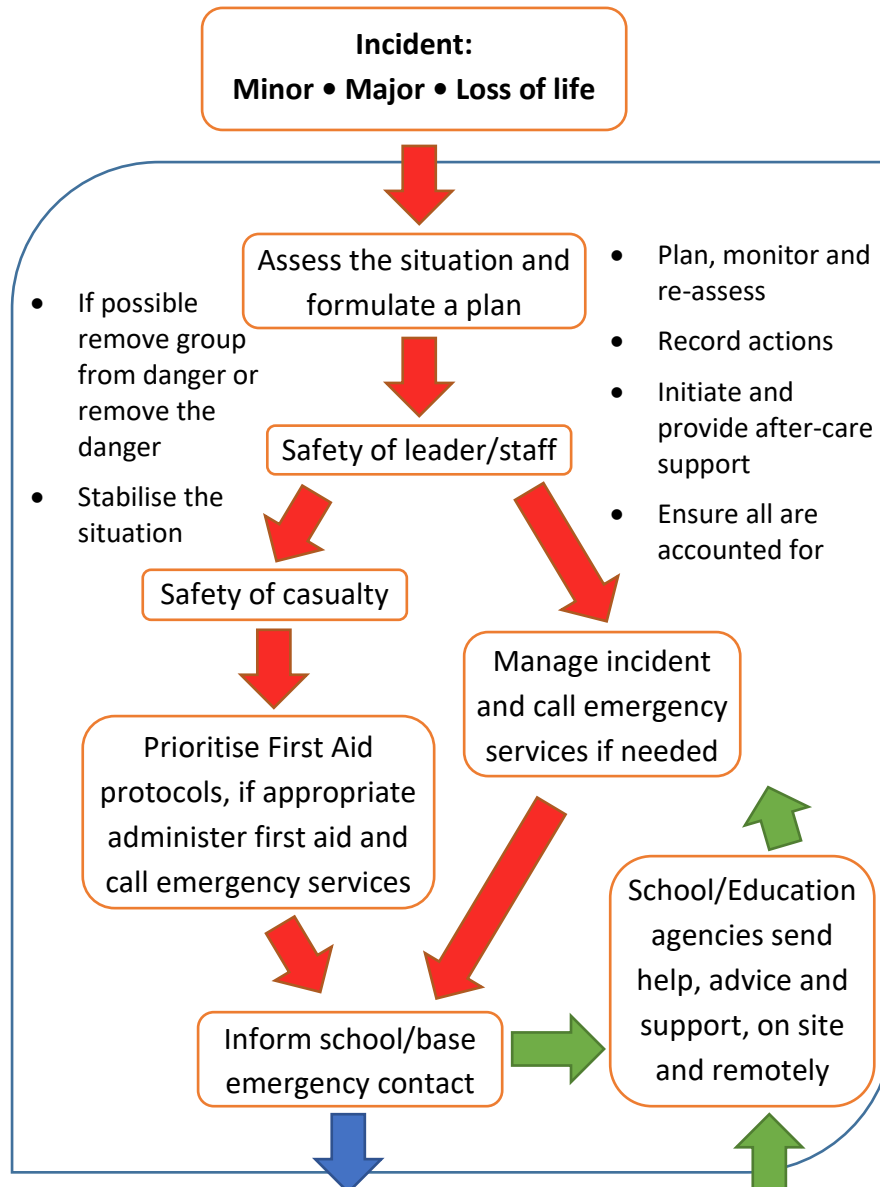
7.0 Emergency Action

The Emergency Action Plan is illustrated below, this can be used to guide Visit Leaders and staff and help manage an emergency incident.

If, or when, managing the situation becomes beyond the staff or school's ability to cope then the Critical Incident Policy should be followed.

A printable copy of the Emergency Action Plan, with a useful notes page, is available in [Appendix 1](#).

An Emergency base contact form can be found in [Appendix 2](#). It provides a prompt for the base contact when dealing with an incident or emergency situation.



- POST INCIDENT:**
- Contact with school, police, parents/carers, HSE, other authorities as necessary
 - Leader, staff and pupil debrief and review
 - Review policies, implement any actions

- LEADER PROMPTS**
- Stay calm
 - **Watch your group & keep them safe**
 - Restrict use of mobile phone & social media
 - **Prevent discussion with public or media**
 - Don't admit liability
 - **Witness information**
 - Photograph the scene sensitively
 - **Don't alter any equipment**
 - Don't allow unsupervised contact with individuals/ group
 - **Only work within your ability, competency & confidence**
 - Adapt this plan if necessary
 - **What seems to be a minor incident can escalate quickly in remote & changing environments**

8.0 Insurance

All off-Island visits other than to Lihou, Herm and Sark require travel insurance. Headteachers/EVCs are responsible for ensuring that all off-site visits are covered by suitable and sufficient Insurance. The usual choice for this would normally be the Education Resources and Estates Management Journey Insurance. This can be booked using the EV5 form (via the Administration & Procurement Manager, Education Resources and Estates Management). Where known medical conditions are concerned, which could have a significant impact on planned activities, please also see [Section 6.11 Informed Parental Consent](#).

Staff and parents/carers must be made aware of the key features of the relevant insurance policy to ensure all are aware and agree to the scope and limitations of the cover, for example limited payments for cancellation, delays, missed flights, loss etc., and any excesses payable. The policy documents can be provided in the information sent home to parents/carers.

Self-led (school staff led, where a third party provider is not involved) off-Island visits that include adventurous activities (climbing, coastering, kayaking, etc.) will need to highlight this when booking/arranging the Education Resources and Estate Management Journey insurance. There may be an additional/increased premium to pay, or further conditions attached by the insurance company. Education Resources and Estate Management must notify the insurance company who need to agree cover. For this reason the visit details should be provided within a time frame that allows for this correspondence. Final approval from Education Resources and Estate Management will be subject to the agreement of our insurers.

If a visit is underwritten by an insurance company other than Education Resources and Estate Management own Journey Insurance, it is essential that the school checks that the policy schedule is suitable and sufficient; it must include repatriation to Guernsey. The certificate/documents should note that the travel starts and finishes in Guernsey and not the U.K. Evidence in writing of this must be kept by the school and be available for monitoring if requested by Education Resources and Estate Management. Education Resources and Estate Management will not take any responsibility for checking insurance policies.

If alternative insurance is arranged, any subsequent administration arising from the visit e.g. claims, etc. must be managed by the establishment. In addition the claims for costs for all follow-up medical treatment arising from the visit must also be managed by the establishment. Parents/carers and staff will need to be informed.

The forms to complete and apply for Education Resources and Estate Management Journey Insurance, the current charging system and Policy Schedule are all available to download from [EVOLVEvisits: Forms](#)

The application for Education Resources and Estate Management journey insurance must be sent to Education Resources and Estate Management separately. It can be obtained by completing the EV5 form and sending it with payment as instructed on the form. A certificate will then be sent to the Headteacher/EVC.

Any subsequent changes to the information given on form EV5 must be notified immediately. Education Resources and Estate Management journey Insurance can only be obtained once Initial Visit Approval is completed and is usually valid only once Final Approval has been given. The Insurance Policy is dependent on compliance with Education Office policies and procedures available on ConnectED.

Insurance cover should be put in place as soon as possible after initial approval so that all financial commitments are covered and **at least 4 weeks before departure**.

Please note that whilst skiing visits can be insured by this policy it does not include cover for lack of snow with transport to other resorts etc. It is advised to check the 'small print' of all ski visit insurance policies.

The Education Resources and Estate Management journey insurance policy does not cover visits to Herm or Lihou or when on-Island. The principle is the same as an injury or similar at school or on-Island – the emergency services/ambulance are called and the usual fee is charged by them. Personal effects and baggage are therefore not covered for the visits to Herm, Lihou or on-Island. Schools should advise parents/carers to ensure their children don't take on visits expensive items like phones and iPads etc. (this is the same principle as when learners are at school). If items are taken on visits and are damaged or lost it is their risk (given they would have been informed – again same principle as when attending a normal school day). If parents/carers want to cover their child or their property in these situations they could take out private insurance to make sure their expectations are catered for.

Further guidance on insurance matters is available from the Administration & Procurement Manager.

8.1 Collective Passport

A letter or email should be sent to the Administration & Procurement Manager to request Education Resources and Estate Management verification for a Collective Passport

application. The Visit Leader will manage this application with the Passport Office. This should be completed at the earliest opportunity.

There is also a section on the EV5 form when applying for Journey Insurance to note that a Collective Passport will be required.

8.2 Off-Site Approvals Category C Visits: Final Approval Checklist for EVC Use

This checklist can help the Headteacher/EVC to determine if thorough planning and preparation is in place for this visit prior to submitting to Education Resources and Estates Management for final approval.

Purpose of visit			
Group			
Item	✓	x	Comment
Visit Leader – previous experience			
Deputy leader assigned with duplicate paper work			
Purpose of visit			
Appropriate to age range of students			
Staff group – previous experience			
Authorisation - criminal record check – Headteacher approval			
Ratio staff : students			
Journey Insurance			
Headteacher (written digital) approval			
Emergency base contact			
Appointed qualified person for first aid			
Informed parental consent (all aspects of trip covered – itinerary provided)			
Itinerary			
Travel/transport			
All onward journeys noted			
Coach operator check – seat belts?			
Group divided/separated?			
Self-drive? See checklist			
Accommodation			
Accommodation - OEAP Provider Form (8q)			

OFF-SITE VISIT PROCEDURES

Item	✓	x	Comment
Authorised entry system			
Appropriate location for group			
Location of staff rooms			
Provider – OEAP Provider Form (8q)			
Quality Badge Scheme or STF			
AALS for adventure activities			
Local providers on 'Out and About' website			
Activity/Itinerary specific submitted			
Provider – Quality Badge Scheme			
Or check AALS for adventure activities			
Relevant qualifications/experience of staff			
Experience of students			
Personal Protective Equipment			
Activity equipment			
Time of year/weather			
Plan B			
Remote supervision			
Noted on EVOLVEvisits?			
Why - purpose?			
Location			
Limited area			
Re-call time			
Appropriate to all individuals in group			
Progressive training with group?			
Parental informed consent specific to arrangements			
Included in risk: benefit assessment			

OFF-SITE VISIT PROCEDURES

Item	✓	x	Comment
Exchange visits – ref. OEAP guidance			
DBS of host families			
Vetting procedure/assurances			
Details of accommodation			
Profile of people in the house			
Bathroom arrangements			
Room share?			
Supervision/journey to group meeting point			
Island representative teams			
EV2 copies			
EV3 completed incl. contacts for staff			
Permission from other school Headteachers?			
Emergency School contact supplied			
School time permission from Headteachers			
Self-drive			
Parental consent – specific and naming driver/s			
Named drivers			
Previous experience – in country – on motorways – minibus/car as appropriate			
Driving licence check – appropriate coding – copied.			
Minibus test?			
Insurance schedule – copy			
Maintenance checks assurance			
Number of seats			
Seat belts – lap and diagonal			

OFF-SITE VISIT PROCEDURES

Item	✓	x	Comment
Journey route/schedule including distances, estimated times and planned breaks			
Hours of work during previous 24 hours?			
Emergency contact			
Out of hours contact – 24 hour – mobile and landline			
Information left at base and with emergency contact			
Risk assessment			
Risk: benefit visits specific assessment			
Reference to generics – site, activity, visit.			
Deals with all 'self-led' parts of the programme			
Attention to high risk areas			
Significant visit specific risks/controls recorded			
DBS check completed on ALL adults accompanying the visit			

9.0 Further Information

9.1 Outdoor Learning Web Site Links

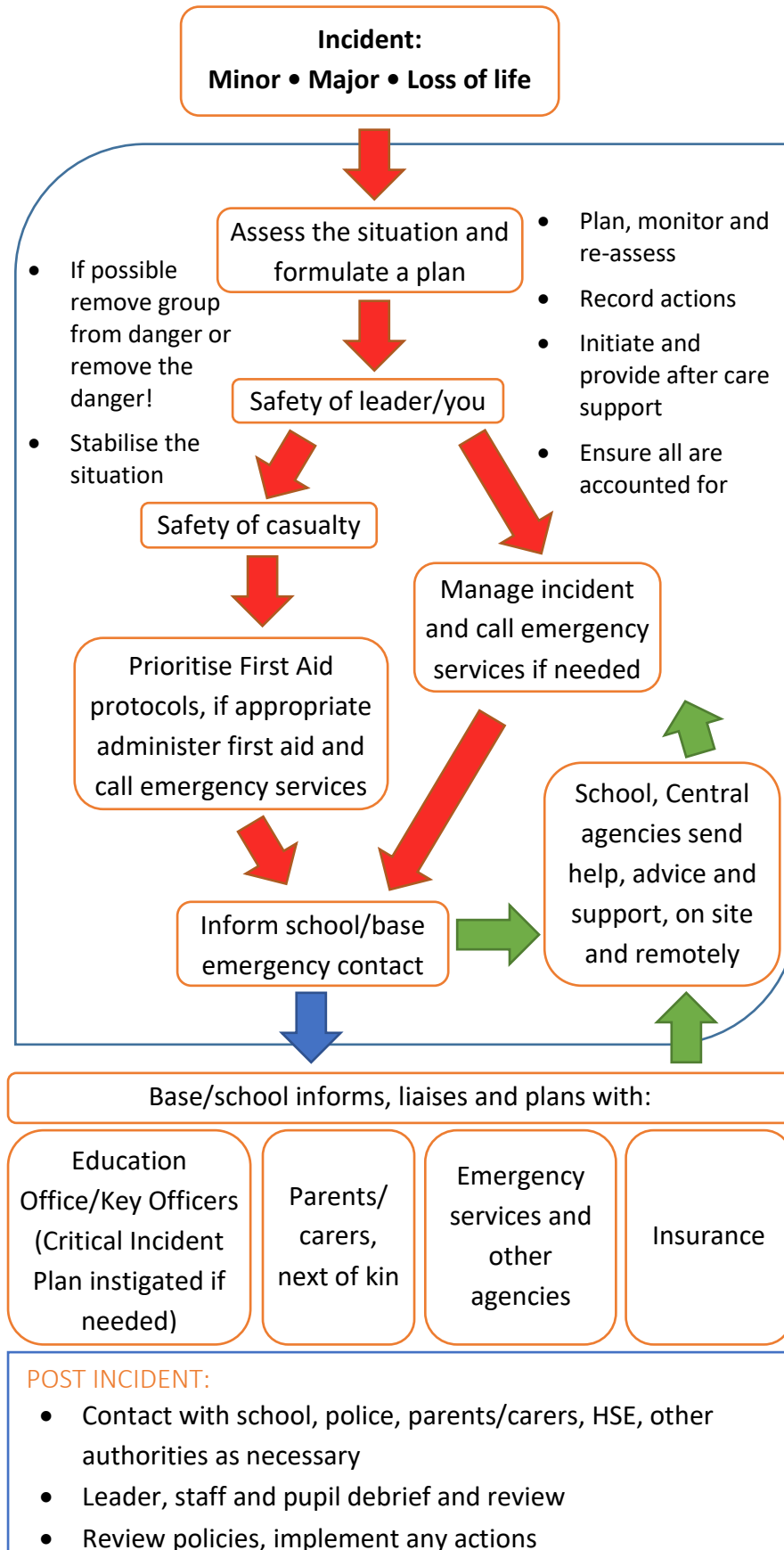
Organisation/Source	Website address/link
EVOLVEvisits	https://evolve.edufocus.co.uk/evco10/evchomepublic.asp?domain=guernsey
Further guidance from Education Resources and Estate Management in relation to off-site visits and Outdoor Education, including risk assessments and forms	Off-site visits and Outdoor Education
Outdoor Education Advisers' Panel	www.oeap.info
National Guidance OEAP	http://oeapng.info/
Department for Education Health and safety: Advice on legal duties and powers	https://www.gov.uk/government/publications/health-and-safety-advice-for-schools
UK Health and Safety Executive (HSE)	http://www.hse.gov.uk/services/education/school-trips.htm
HSE Adventure Activities Licensing	http://www.hse.gov.uk/aala/index.htm
Learning Outside the Classroom	www.lotc.org.uk
Quality badge*	www.lotcqualitybadge.org.uk
Adventuremark*	www.adventuremark.co.uk
Adventure Activity Associates*	www.adventureactivityassociates.co.uk
School Travel Forum*	www.schooltravelforum.com
Adventure Activities Licensing Service*	www.hse.gov.uk/aala
Youth Hostel Association	www.yha.org.uk
Guidance on first aid for schools	www.teachernet.gov.uk/firstaid
Guidance on medical needs	www.teachernet.gov.uk/medical
HSE INDG163 Risk Assessment	www.hse.gov.uk/pUbns/indg163.pdf

* Web sites to be used for checking that providers are assured.

10.0 Index of Forms

Forms	Description
EV1	Medical and emergency contact details (Staff and other adults)
EV2	Medical details/parental consent for learners
EV3	Summary form of participants
EV4	Specific Risk Assessment form
EV5	Insurance form

Appendix 1: Emergency Action Plan



LEADER PROMPTS

- Stay calm
- **Watch your group & keep them safe**
- Restrict use of mobile phone & social media
- **Prevent discussion with public or media**
- Don't admit liability
- **Witness information**
- Photograph the scene sensitively
- **Don't alter any equipment**
- Don't allow unsupervised contact with individuals/group
- **Only work within your ability, competency & confidence**
- Adapt this plan if necessary
- **What seems to be a minor incident can escalate quickly in remote & changing environments**

Field notes and recording sheet for Incidents			
When	Who	What	Where
11.30pm	Joe Bloggs	Fell out of bed, staff took him to downstairs	Room 12

Useful numbers

Base contacts:

Other Staff:

Providers:

Local Emergency Services:

Other:

When notifying your base they need to know:

What happened? Where – location? When – date/time?
 Who was involved/injured?
 Name of all involved? Action taken so far? Agree further actions and contact number/procedure.



Appendix 2: Emergency Base Contact Form

Action to be taken by the Emergency Base Contact (an on-call senior manager) in the event of a serious accident/incident or other difficulties e.g.:

- an incident leading to a fatality, serious or multiple fractures, amputation or other serious injury
 - circumstances in which a group member might be at serious risk/serious illness
 - any situation in which the press or media are or might be involved.
 - significantly changing itineraries
- 1) Record the telephone number of the Visit Leader and the group (and possible alternative contacts). Listen carefully and write down:
 - what happened
 - to whom
 - where
 - when
 - what has happened since the incident
 - agree possible actions (including contact procedures)
 - 2) Inform the Headteacher of your establishment or a senior member of staff, of the relevant details as soon as possible. Phone number:
 - 3) If agreed or as necessary, implement the Critical Incident Plan.
Relevant current Key Officer telephone numbers are:.....
.....
- Liaise with The Education Office, Emergency Services, HSC/Child Services, Insurance, HSE, relevant agencies
- 4) The parents/carers of any injured young person(s) must be notified as a priority, arrangements should also be made for all parents/carers to be contacted regarding the safety of their particular child(ren) (this includes information on significant itinerary changes).
 - 5) If necessary, assistance should be given to transport parents/carers to their injured child if he/she is hospitalised. This may involve liaising with the insurance company
 - 6) Refer all press/media enquiries to the Corporate Communications Team (comms@gov.gg). **Do not discuss anything with media or other third parties.**
 - 7) Emergency Base Contacts must keep with them the visit pack - including:
 - lists of all group members (including adults) together with relevant medical information and the addresses/telephone/contacts details of their next-of-kin
 - Complete details of the itinerary, route plan, and info on alternative plan B options
 - The group's vehicle(s) registration number(s) and passenger list(s) for each vehicle
 - Phone numbers of senior staff from the establishments (+Education Office) concerned
-

Recording sheet for Incidents

When	Who	What	Where
11.30pm	Joe Bloggs	Fell out of bed, staff took him to downstairs	Room 12

Useful Numbers:

Visit Leader: mobile.....landline.....
 Other staff
 Other.....

Consider:

What happened? Where – location? When – date/time?
 Who was involved/injured? Names of all involved? Action taken so far?
 Agree further actions and contact number/procedure Take notes

Remind the Visit Leader to:

- Stay calm, work within their ability whilst assessing the situation and formulating a plan.
- Ensure all are accounted for - watch the group and keep them safe
- Remove the group from danger or remove the danger - if at all possible
- Initiate and provide after care and support, prioritising first aid protocols as necessary
- Restrict the use of mobiles/social media – do not discuss with the media/public
- Don't admit liability, get witness information/contacts
- Photograph the scene sensitively but don't alter anything
- Don't allow unsupervised contact with individuals or the group
- Monitor the situation re assess the plan, adapt as needed
- Record actions

Appendix 3: EV 9 Form

Person Monitoring:		Date of monitoring visit:					
School/Service setting:							
Evolve I.D. and visit name:							
Visit Category (tick box)	Residential (Cat C)		Off-Island (Cat C)		Adventurous Activities (Cat B)		Low risk (Cat A)
Location & activities:							
Visit Leader name:							
Time of observation: from.....to.....				Total time:			
Supervision details:							
	Total on visit	Total as per EVOLVE	Males on visit	Males as per EVOLVE	Females on visit	Females as per EVOLVE	Comments (discrepancies with original ratio/supervision plan, etc.)
Staff							
Adult helpers							
Learners							
Context:							
Quality & Safety:							
Outcomes & Recommendations:							
Signed:				Date:			

Checklist to help inform Visit Monitoring

	Variables	Considered	Comments
Context (pre-visit)	History of activity		
	Size of group		
	Experience of group and leaders (Staff)		
	Relationship between group and leaders		
	Evidence of planning and preparation (EVOLVE)		
	Briefings		
	Informed parental consent obtained		
	SEN/Medical needs		
	Insurance		
	Announced/unannounced visit		
Observations on Safety	Suitability of venue and location (Environment)		
	Suitability and safety of the activity		
	Familiarity with venue		
	Competence of visit leader		
	Competence of technical lead		
	Risk assessments for the activity (& plan B activity)		
	Evidence of staff training		
	Appropriate ratios of staff to participants		
	Pastoral supervision		
	Dynamic risk assessment		
	Weather and forecast		
	Transport/driver competence/vehicle suitability		
	PPE and other safety critical equipment		
	Emergency procedures (& base contact + comms)		
	First aid provision		
Observations on Quality	Clear learning outcomes		
	Appropriate tasks/ activities		
	Proportion of time on task		
	Differentiation		
	Progression		
	Pace		
	Appropriate level of challenge		
	Inclusion and special needs provision		
	Extension activities		
	Assessment for learning		
	Evaluation		

Relate the **SAGE** (Staff, Activity, Group, Environment) variables to the visit.