

FEBRUARY '05

**Guidelines For Off Site Visits
And Activities**

**BRADFORD METROPOLITAN
DISTRICT COUNCIL**

CONTENTS	PAGE
FOREWORD	3
INTRODUCTION	
• The value of visits	4
• Who the guidance applies to	5
• Requirements for schools	5
• How to use the guidance	5
• Terminology	6-7
<u>PART 1</u> GROUPEADERS HANDBOOK FOR ORGANISING AND LEADING VISITS	
• Approval Procedures and Model Approval Form	8-12
• Visit Planner	13-14
• Checklist for the Group Leader	15-17
PART 2 TYPES OF VISIT	32-56
• Adventure Activities. Includes Adventure Activities Leader Registration, Adventure Activity Matrix, Specific Activity Standards (Including Generic Risk Assessments),	
PART 3 MANAGEMENT FRAMEWORK	57
• Legal Framework	58
• Overview of Roles and Responsibilities	59
• Notification, Approval and Monitoring Procedures	59
• Council Code of Practice	60-61
• Schools Code of Practice. Roles and Responsibilities for Governors, Head teacher, EVC, Group Leader, Adult Helpers, Parents and Pupils	62-75
APPENDICES	
• A. Risk Assessment exemplar and notes	
• B. Medical / Parental Consent Form	
• C. Activity Providers and Tour Operators checklist	

FOREWORD

February 2005

Bradford Metropolitan District Council published its most recent guidelines on Educational Visits in January 2001.

A large number of Bradford Schools continue to make the considerable benefits of Educational Visits available to their pupils, and great credit goes to Headteachers, Educational Visits Co-ordinators, Group Leaders and others whose hard work makes this possible.

It has to be acknowledged however, that schools and teachers do feel pressure to reconsider their commitment to Educational Visits, in light of the perceived threat of litigation and anxiety about unnecessary and time-consuming paperwork. Consequently, the Education Client Team, on behalf of the Council, has reviewed and updated its guidance to schools. The intention is to present a clear and simple handbook, particularly for those planning and organising visits.

Teachers and others leading visits need to be confident that they have taken the reasonable and practicable steps necessary to ensure the safety of the young people in their care whilst on visits. If they follow the guidelines outlined here, they are demonstrating precisely the level of care and commitment which society rightly expects, and which are the hallmarks of a well-organised, successful educational visit.

In addition to the guidelines published here, the Education Client Team have appointed a full time Educational Visits Adviser, Jim Hughes, based at Future House, telephone 01274 385585, e-mail jim.hughes@bradford.gov.uk. The EVA role is to organise training for Educational Visits Co-ordinators and others involved in the delivery of visits, to offer individual advice and guidance to schools, and to monitor and review the planning and delivery of visits.

Thank you for the work you have done and continue to do for the benefit of Bradford's pupils. I commend these guidelines to you.

Yours sincerely

Phil Green

Education Director

INTRODUCTION

The Department for Education and Skills issued the following national guidance for the Health and Safety of pupils on Educational Visits. (HASPEV)

- Health and Safety of Pupils on Educational Visits. 1998
- Responsibilities and Powers. 2001
- Standards for LEAs in Overseeing Educational Visits. 2002
- Standards for Adventure. 2002
- A Handbook for Group Leaders. 2002
- Safety at the Water Margins. 2003

Whilst the Bradford Guidance should offer the first point of reference, Managers and Organisers need to be familiar with the national guidance, using it as required. These documents form an addendum to the Bradford Guidance and are referenced where information can be directly adopted.

THE VALUE OF VISITS

Visits, off-site activities and outdoor education have great potential for enhancing the health, education and development of young people. In particular such first hand experience can:

- Extend personal horizons through greater appreciation and understanding of the world and its peoples
- Understand the need for sustainable relationships between people and their environment
- Develop self-esteem, personal responsibility, co-operation and respect
- Enhance practical problem solving and team work skills
- Promote a positive and knowledgeable response towards personal health and well being

The venture is particularly effective when participants have the opportunity to reflect and build on their experiences.

Bradford Council recognises the value of a wide range of visits from short local excursions to expeditions overseas. Many opportunities are available, led by Schools as well as Community-based organisations.

These are most often taken up by young people, but should be available and accessible to all regardless of age and ability. They should not discriminate against anyone on the grounds of gender, ethnic origin, social background or disability.

WHO THE GUIDANCE APPLIES TO

This Guidance applies to staff and volunteers in all Bradford MDC establishments including:

- Schools and Colleges
- Youth Service
- Bradford Duke of Edinburgh's Award
- Leisure
- Social Services

Whilst the terminology and principal audience is school based, other departments should ensure that an appropriate management framework is in place.

The document may also apply to those organisations, which have formally subscribed their participation in its use and associated advice, information and training.

REQUIREMENTS FOR SCHOOLS

Schools are required to:

- Approve ALL Visits. This is a delegated responsibility from the Council
- Notify the Local Authority of the types of visits planned on a biannual basis. This will assist the Council to support and monitor visits
- Register School Staff wishing to lead Adventure Activities with the Council.
- Seek Advice where necessary

The Council will:

- Monitor the School based management and on site leadership of visits
- Offer advice, training, emergency support and insurance cover

Detailed requirements are given in Part3. Management Framework

HOW TO USE THE GUIDANCE

PART 1. GROUPLADERS HANDBOOK FOR ORGANISING AND LEADING VISITS

The Group Leader plays the central role in the organisation of all Visits. With this in mind the first part of the document, 'Organising and Leading Visits' can be regarded as a **Handbook for the Group Leader**, and will help the Group Leader to consider all arrangements for the trip and present these for approval.

It is intended as a practical guide, and could usefully be used in School as a Handbook for everyone who leads an Educational Visit.

Suggestions for customising this Handbook as a **School Policy document** are given at the start.

PART 2. TYPES OF VISIT

The second part of the document considers the range and scope of visits. It focuses particularly on adventurous activities, and provides a matrix of individual activities indicating minimum ratios and appropriate leadership qualifications. This section also explains Bradford's Adventure Activities Leader Registration scheme.

Note: Adventurous Activities may only be led by school and youth service staff if their competence has been verified by this scheme. Contracted providers with an AALA licence, such as Ingleborough Hall O.E.C, will verify the competence of their own centre instructors.

PART 3. MANAGEMENT FRAMEWORK

Part 3 of the document provides an overview of the whole process of managing a visit, from conception to completion. The *delegated* roles and responsibilities of all involved parties are detailed, along with **Bradford Council's requirements for the notification and approval of visits by schools.**

Safe and successful Educational Visits are a team effort requiring input from Managers and Governing Bodies, the Group Leader, Group Supervisors, Activity Leaders, Contracted Providers, Participants and Parents. Each party should be aware of their contribution and the need to exchange information freely.

TERMINOLOGY

School terminology is generally used, however titles are interchangeable with the equivalent term in other departments. These are indicated below.

"Local Authority" – Bradford Metropolitan District Council. (LEA / Council)

"Governors" – members of school and college governing bodies. It also includes Community Governors, members of management committees and other formally constituted groups which have delegated responsibility.

"Head" – the Head teacher, Principle of the establishment or line manager to whom the Group Leader is responsible and from whom approval is required for a trip to go ahead.

"Group Leader" - is in overall charge of the planning as well as the supervision and safety of the party throughout the visit. May be a teacher, Youth leader, etc.

"Supervisor" (Group Supervisor) – the person who has been delegated direct responsibility for managing a group at specified times within the visit, usually as a result of a larger group splitting, e.g. on transport, on activities or excursions, at a residential base. Supervisory skills are generally required rather than technical activity skills.

“Activity Leader” – the person to whom responsibility may have been delegated for specialist or technical instruction or supervision, as a result of their specific competence in an activity. May be referred to as Instructor, Coach, Tutor, etc. Note that the Group Supervisor retains ultimate responsibility and will need to discuss any concerns with the Activity Leader.

“Assistant” – will take direction from the attendant Leader or Supervisor who must ensure that duties are assigned within the known competence of the assistant.

“Participant” (Pupils, Students or group members) – any person undertaking the activity or visit.

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

“Contracted Provider” (Contractor) – any third party provider contracted to deliver a particular aspect of the visit. E.g. Outdoor Education Centre, Freelance Instructor, Travel Company, Coach Hire, Hotel, Theme Park. The Contractor and the Group Leader must be clear about who is responsible for each aspect of safety management.

“Visit” (Trip/Excursion) – may refer to the whole journey away from home or particular aspects such as activity time. The terms off-site activities, Outdoor Education, Residential may be used to identify a particular type of visit.

PART 1. **GROUPLEADERS HANDBOOK FOR ORGANISING AND LEADING VISITS**

The Group Leader plays the central role in the organisation of all Visits. With this in mind this section can be regarded as a model **Handbook for the Group Leader**. It will help the Group Leader to consider all arrangements for the trip and present these for approval.

HOW THE HANDBOOK WORKS

The model **Approval form** is accompanied by a **Visit Planner**. This helps the Group Leader to make plans systematically, making notes and references under each heading.

The Visit planner can be used by the Head/Governors as evidence that the Group Leader has made appropriate arrangements. It also helps them to make systematic checks.

The headings on the planner correspond to headings in the **Group Leaders Checklist**. This is a fairly detailed list of considerations and appropriate standards which will help the Group Leader to think about each aspect of the trip.

References are given to HASPEV, other documents and contacts where further research or advice may be required.

Schools can adapt the forms and text to suit their own requirements. With additions it may be adapted as a **School Policy document for Educational Visits**.

OUTLINE SCHOOL POLICY FOR EDUCATIONAL VISITS

A School Policy for Educational Visits would include:

1. A statement of intent and support from the Governors
2. A list of the types of visit that the school arranges. It is useful to split these into categories according to how the visits are approved. (See suggested Levels of Approval).
3. Outline of how School Staff gain approval for visits in each category. Approval procedures. (See Exemplar notes)
4. Approval Form and accompanying information. (See model form and visit planner. These forms can be adapted to specific school requirements)
5. Additional forms i.e. Consent/Medical/Next of kin contacts, Contracted providers checklist, Visit Risk Assessment. (See Appendices A,B and C).
6. Booking out procedures for e.g. minibus, FA kit, packed lunch, emergency cards
7. Procedures for notification before going off-site.
8. School Emergency plan
9. Where to find Forms and Reference Information in School and who to seek for Advice

NOTES FOR APPROVING SCHOOL VISITS

For each Visit or Rolling Programme the Group Leader must:

- ✓ Complete the approval form.
- ✓ The Visit planner should help the Group leader to plan systematically, making notes and references under each heading. It may be required by the EVC/Head to assist them when approving the trip.
- ✓ The Group Leaders Checklist gives a detailed list of considerations for each heading on the Visit planner.

Approval Timetable

- ✓ Seek initial approval from the Head/EVC/Governors, in principal, before committing to detailed arrangements for the trip.
- ✓ A single approval may be given for rolling programmes organised by a Visit Leader over a set period. E.g. Club activities, Sports fixtures, regular activities. In this case each visit would need to be notified in school before departure.
- ✓ Final approval must be obtained from the Head/EVC, before the trip can go ahead. Additional Endorsement may be required from the Governors.
- ✓ **Formal Approval** must be in writing. A signature on the approval form is sufficient.

Written Guidance

- ✓ Headings on the Visit planner correspond with those on the more detailed Group Leaders checklist.
- ✓ Further references and HASPEV give more detailed information.

Further Advice.

- ✓ Initially contact the School Educational Visits Coordinator (EVC)-name/telephone or Head.
- ✓ The Local Authority Educational Visits Advisor will give further help. Name/contacts.

Submit the Visit Approval form to the EVC/Head

- ✓ Consider timescales for planning and approval.
- ✓ The Head/EVC and the Visit Leader must retain copies of all appropriate information.
- ✓ The Head /EVC must be informed if the programme changes after being approved.

SUGGESTED LEVELS OF APPROVAL

The EVC will direct the Approval Forms and associated information to the Head, the Governors and the Local Authority, as appropriate.

TYPE OF VISIT	APPROVAL AND CONSENT
<p>Frequent Offsite Activities such as School Matches and Club Activities, Swimming Lessons with qualified tutors, simple walks from School, visits to Local Libraries and Leisure Centres.</p>	<p>Rolling Approval by Head Teacher. Governors may endorse according to School Policy. Daily School notification system</p> <p>Periodic Parental Consent for frequent activities may cover up to 1 School year. Parents to be notified before each visit</p>
<p>Occasional day trips to Museums, Theatre, Cities, Parks, Theme Parks, Farms (with Public facilities), Environmental Centres, Village Studies, Zoos, Local Walks.</p>	<p>Approval for each visit by Head Teacher. Governors may endorse according to School Policy. Parental Consent obtained for each visit.</p>
<p>Residential trips. All Overnight Stays.</p> <p>Visits Abroad. Exchange visits</p>	<p>Approval by Head Teacher. Endorsement from Governors. Specific Parental Consent for Visit and Activities</p>
<p>Adventure Activities Sailing, Windsurfing, Canoeing, Rafting. Hill/Mountain Walks. River Walking, Gorge Scrambling. Rock-Climbing, Abseiling, Rock Scrambling. Caving (not show caves). Skiing and Snow Boarding. Off Road Cycling. Swimming in natural waters or pools without lifeguard supervision.</p>	<p>Registration with Local Authority for Self-led Adventure Activities</p> <p>Approval by Head Teacher. Endorsement from Governors.</p> <p>Specific Parental Consent for Visit and Activities.</p>
<p>Activities requiring special care, experience, training. Paddling in sea, lake or stream. Camping. Countryside Walking E.g. Malham, Bolton Abbey. On Road Cycling</p>	<p>Approval by Head Teacher. Endorsement from Governors. Seek Advice as required.</p> <p>Specific Parental Consent for Visit and Activities.</p>
<p><u>Higher risk activities beyond the Guidance</u> E.g. Land Yachting and Kite Buggy, Power Kiting. All Airborne Activities. Gliding, Hang Gliding, Parapenting. Surfing, Water-skiing, Jet Skiing, Offshore Yachting, Sub Aqua and Snorkelling.</p>	<p>Approval by Head Teacher. Endorsement from Governors. Seek Advice Specific Parental Consent for Visit and Activities.</p>

SCHOOL VISITS AND OFF-SITE APPROVAL FORM

Group Leader: Contact address, phone, email

Dates:

Group: Class, Year

Number of Pupils

Male

Female

Total

Ages

Venue: Address of residential base

Nature of Activities

Led by: Contractor, Named School Staff

Purpose of Trip:

Transport and Travel Arrangements: e.g. School Drivers, Contractors, append details

Staff and Volunteers:	Main Duties: Deputy leader, assist activities, first aid, supervision

Emergency School Contact(s): 24hr, mobile and landline phone numbers
Main Contact(s) on Visit: 24hr, mobile and landline phone numbers

List appended details: Letter to Parents, Contact details, Visit Planner, Costs	Notes:

I confirm that the visit will be arranged in accordance with the Bradford Guidance for Off-site visits.

Signed Visit Leader: _____ Date _____

I confirm that the visit is approved. **Head teacher/EVC:** _____ Date _____

I confirm that the visit is endorsed. **Governor(s):** _____ Date _____

Comments: Further info required, not approved, conditions of approval

VISIT PLANNER

GROUP LEADER _____

Use with the approval form. The Group Leader Checklist gives details for each heading

CHECKS	NOTES (or where information attached)	Checked
INITIAL PLANS		
Timetable for Planning/Approval.		
Exploratory Visit		
Accommodation		
Contracted Providers		
STAFFING AND SUPERVISION		
Staff Roles and duties		
Child Protection/CRB Checks		
General Supervision and Ratios		
Gender issues		
Arrangements for Special Needs		
Participant preparation, rules & conduct		
Remote Supervision. Unaccompanied parts of the visit		
Activity Supervision/Leadership		
Staff Briefing		

CHECKS	NOTES (or where information attached)	Checked
TRANSPORT AND TRAVEL		
Travel Details/Contractors		
Travel Supervision		
Minibuses/Drivers		
Private Cars		
INFORMATION FOR PARENTS, PARTICIPANTS AND LEADERS		
Information to Parents		
Emergency/Consent/Medical forms		
Parent Briefing		
Participant Briefing		
ACCIDENT AND EMERGENCY PROCEDURES		
First Aid		
Emergency Plan/Contacts		
Accidents/near miss reporting		
Insurance		
Cost and Finances		
Risk Assessments		
Monitoring and Review		

All arrangements appropriate _____ Confirmed _____ Date _____

GROUP LEADERS CHECKLIST

INITIAL PLANS

A Group Leader must be nominated for each trip (or rolling programme) and will be in overall charge of the planning as well as the supervision and safety of the party throughout the visit.

This may include delegation of duties to other members of staff and volunteers, however the key responsibility remains with the Visit Leader.

The Checks below outline key arrangements and considerations. References to more detailed information are given. The Checklist in brief (Visit Planner) should be used with the Approval Form.

Approval

The School must approve all Visits and Off-site Activities

- ✓ Decide timescales for planning and Full Approval.
- ✓ Visit Leader has appropriate experience, skills and personal qualities.
- ✓ Outline proposals need to show a purpose for the visit, with venue and activities that are appropriate for the age and ability of the group.
- ✓ Cost and staffing estimates are often useful at an early stage.
- ✓ Initial Approval, given in principle by Governors/Head/EVC, only agrees to detailed plans being worked up and in no way gives permission for the visit to go ahead.
- ✓ Seek advice as required from the School EVC, Head teacher, EVA, etc.
- ✓ Submit Approval Form and other relevant information to the EVC/Head.
- ✓ Use the Visit Planner to confirm that all appropriate arrangements have been made, giving reference to further appended details e.g. letter to parents, contractor info, emergency contacts.
- ✓ Formal approval, in writing, must be given before the trip commences. A signature on the approval form is sufficient.

Exploratory Visit

First hand knowledge of the venue is strongly advised, particularly for first time visits and where leaders need to familiarise themselves with the locality e.g. to lead activities. If an Exploratory visit cannot be arranged then staff should generally have a high level of experience of similar types of visit.

Consider:

- ✓ Consult records of previous visits
- ✓ What local knowledge is available? E.g. Tour operators, Activity Providers.
- ✓ Ensure that the venue is suitable; identify obvious and significant dangers, exchange information with contractors. Plan supervision and programming.
- ✓ Could changes to the venue e.g. river levels since a recce or previous visit significantly affect safety?
- ✓ Should time be allocated to recce the area in the early stages of the visit?
- ✓ Make notes of issues arising as part of the risk assessment.

Reference: HASPEV 47-52, Standards for LEA's 26-28

Accommodation

A wide variety of overnight accommodation may be appropriate including Hotel, Youth Hostel, Self-catering bunkhouse, mountain hut, camping.

Consider:

- ✓ General security arrangements. Building and room security, access to staff help, particularly of the same gender, and proximity of the group to each other.
- ✓ Fire safety arrangements.
- ✓ Dietary requirements and Food Hygiene standards.
- ✓ Specific Hazards around the site e.g. balconies.

Contracted Providers

Contracted Providers include Outdoor Centres, Freelance Activity Providers, Tour Operators and Travel Companies as well as facilities such as Theme parks, Zoos, Farms, Museums, etc. Key questions that determine the safety arrangements are:

- ✓ Which aspects of the visit is the Visit Leader/staff responsible for? E.g. supervision
- ✓ Which aspects of the visit is the contractor responsible for? E.g. Activity Leadership, Driving, Safe Facilities.
- ✓ What reassurances need to be obtained from the contractor in order to check that their provision is safe? E.g. ATOL bonded travel company, Adventure Activities Licence, See copies of Risk Assessments, written contract to declaring that safety provision is in place. (See Appendix B)

- ✓ What information is required from the contractor to help the visit leader/staff to keep the group safe? E.g. Centre/facility rules, hazardous areas, fire drills.
- ✓ How and when will the Visit leader and staff be given safety information? E.g. Written, briefing sessions, contractors risk assessment. Consider the most useful way to do this.

Advance contact with the contractor and exploratory visits will establish:

- ✓ Programme content and organisation that is appropriate to the age and abilities of participants and the aims of the programme.
- ✓ The Safety parameters, as considered above. Who will take care of the safety measures and how this will happen.
- ✓ How and when the providers' staff will be informed about medical and other needs of the visiting party.
- ✓ If concerns arise how these can be resolved on the visit.
- ✓ Emergency procedures.

Reference: HASPEV 201-204, Standards for LEA's 56-61

STAFFING AND SUPERVISION

Staff Roles

The Headteacher must be satisfied that pupils are supervised by an adult who is:

- Competent and suitable
- CRB checked
- Fully briefed on school policies and relevant procedures
- Approved by the Headteacher and governing body

Competence may be defined by training, qualification and experience

Suitability is a matter of judgement of the character, attitude and experience of the person to undertake the required level of supervision or leadership.

A clear understanding of **roles and duties** must exist between the Visit Leader, and other staff, including volunteers. Managing visits is often a team effort, particularly with large-scale visits or rolling programmes. In these circumstances the Visit Leader retains ultimate responsibility throughout the programme. Outline the duties on the Approval form.

- ✓ Delegation of duties must fall within each person's competence.
- ✓ A Deputy Visit Leader must be assigned for multi-staff visits. They must be able to assume the Leaders duties if required e.g. if the leader is ill.
- ✓ The Local Authority Adventure Activities Registration Scheme must approve staff wishing to lead Adventure Activities.

Child Protection/CRB Checks

The greatest protection against child abuse in any form is staff awareness, vigilance and a willingness to report concerns. All adults who are given unsupervised or regular access to children must have obtained an appropriate Criminal Record Check. This will normally include staff and volunteers working residentially. The visit Leader should consider:

- ✓ Who is not CRB checked? Will they be working under supervision? Do they need checking?
- ✓ Requesting assurances from contractors that staff have received appropriate checks
- ✓ How do adults protect themselves against false accusations?
- ✓ Particularly, how do adult supervisors ensure that wherever possible they are not alone with a pupil?
- ✓ How to ensure that Staff are aware, sensitive and vigilant towards child protection issues.

The Visit Leader must report any concern directly to the Headteacher/Governing Body or in unusual circumstances to the LEA

Reference: Standards for LEA's 82-86, HASPEV 75-78, www.disclosure.gov.uk, DfES 0780/2002.

Supervision and Ratios

All Supervision must be Active

Appropriate Supervision should be part of the planned arrangements and needs to be maintained throughout an excursion. Staff to pupil ratios should reflect the specific needs of the group, the venue and the programme.

Appropriate Staffing levels are the responsibility of the Headteacher

Consider:

- ✓ Supervision whilst travelling, at residential bases, on activities, in non-directed time? Ratios are not prescribed; they should be decided by a carefully considered risk assessment. Guidance is given in HASPEV para 70. Minimum ratios for activities are given in Bradford Guidance (Part 2) – Types of Visit.
- ✓ When large groups are split into smaller sub groups it is important that the responsibility for supervision is clear and unambiguous, particularly at changeover time.
- ✓ Systems such as, Headcounts, buddy groups, staff carrying or having ready access to a list of participants, easily identifiable clothing should be deployed as appropriate
- ✓ Ensure that enough supervisors are available to cope effectively with emergencies or other contingencies e.g. staff illness.
- ✓ Particularly for Residential visits, participants must have access to a member of staff of their own **gender**.
- ✓ Supervision and Ratios should be adjusted to take into account participants with **disabilities special educational and/or medical needs**. Special arrangements may be needed to create access including higher supervision ratios, specialist training and physical adaptations. Alternatively programmes may need to be adapted to be inclusive.
Reference: HASPEV 99-108, Standards for LEA's 87-90, Disability Rights Commission Code of Practice for Schools, www.drc-gb.org
- ✓ Ensure that **participants are fully prepared and aware of rules and expectations of their own conduct**. Participants may be involved in the planning of visits, and should be involved in assessing their own responsibilities and contributions to safety.
Reference: HASPEV 85-94
- ✓ **Remote Supervision**, including unaccompanied parts of the visit, e.g. souvenir shopping) can be considered if participants are suitably responsible, experienced and prepared. The supervisor retains responsibility and must be able to actively monitor the welfare of the group and respond to concerns if they arise
Reference: HASPEV 82-84 and 95-96, Standards for Adventure 43-51

- ✓ Staff may be asked to adopt a **supervisory or assisting role on activities**, and should work under the direction of the Activity Leader. A clear transfer of leadership must take place at the beginning and end of activities. In these circumstances staff are still responsible for monitoring the safety of participants. If Staff are concerned about safety the first course of action must be to inform the Activity Leader. If the situation is not rectified then participants should be withdrawn from the activity at the first appropriate opportunity. Care should be taken not to cause further risk or distress. The Visit Leader must be informed and written concerns submitted to the Contractor and the Head teacher.
- ✓ Ensure that when applicable Adventure Activities are **school led**, the Activity Leaders are approved by the LEA's Leadership Registration scheme. (See guidance notes in Part 2, Types of Visit). Where Registration does not apply, e.g. non-remote country walks, the Headteacher must be satisfied as to the Leader's competence.
- ✓ After the excursion, the Visit Leader must ensure that participants are **returned to a 'safe' place**. Where appropriate a parent or carer should meet children.

Staff Briefing

A briefing session for all staff should be held before the visit. Staff briefing or an alternative means of communication will need to be arranged at appropriate intervals throughout the visit, without compromising supervision. Consider when and how?

Staff briefings will need to include:

- ✓ Clear definition of Staff roles and duties.
- ✓ How staff will exchange significant information and report to the Visit Leader.
- ✓ How to maintain Supervision throughout the visit. Splits into Sub groups. When to headcount.
- ✓ Full details of visit.
- ✓ Special needs and Medical Issues
- ✓ Child Protection arrangements
- ✓ Rules and expectations of behaviour from participants. Staff?
- ✓ First Aid, Accident Reporting and Emergency Plans
- ✓ Anticipation of key hazards and management of these
- ✓ When to go to Plan B. How to deal with/Who to tell about immediate and ongoing concerns.

Reference: HASPEV supplement part 3 - A HANDBOOK FOR GROUPLADERS, HASPEV 69-108, Standards for Adventure 43-57

TRANSPORT AND TRAVEL

The Group Leader is responsible for ensuring that all transport arrangements are safe and that specific Local Authority and legal requirements are met. A Generic Risk Assessment for transportation is appended. Additional issues and specific arrangements should be identified on Visit specific assessments.

Risk may be higher whilst travelling than at any other time on the visit.

Forms of transportation on off-site visits may include:

- School owned/volunteer transport: Minibus, car and coach.
- Private Hire: Minibus - self drive, minibus – driver supplied, taxi, and coach.
- Public Transport: Local bus, coaches, trains, air travel, ferries, underground, etc.

Travel Contractors and Public Transport

E.g. Privately hired transport such as Coach hire and public transport systems e.g. Air travel, Rail, Ferry.

Contractors are responsible for ensuring safety standards. Assurances should be requested if doubts exist as to the company's reputation and safety standards. Specific requirements such as the availability of seatbelts on coaches should be confirmed.

Staff must ensure that supervision is maintained throughout the journey.

Other forms of Public Transport such as Trams, cable cars, have individual requirements. Risk Assessment will dictate specific arrangements e.g.

Use of Underground

This is potentially a very dangerous and frightening method of travel for parties of children, especially if they have not used it before. The Group Leader must ensure:

- ✓ Strict supervision, discipline and clear instruction regarding the destination and what to do if separated from the party
- ✓ Avoidance of rush hours whenever possible
- ✓ Advanced purchase of tickets whenever possible

Reference: HASPEV 130-135

Travel Supervision

The Group Leader must ensure the following:

- ✓ Pupils are actively supervised by appropriate placement of adult supervisors, especially on double-decker buses, trains etc.
- ✓ Seat belts are correctly fitted
- ✓ Behaviour does not cause any distraction to the driver or annoyance to members of the public
- ✓ The party knows the location of the emergency exit, first aid, meeting point, fire equipment etc as appropriate
- ✓ Headcounts or registration as appropriate at key points
- ✓ Safety of the party whilst waiting at pick-up points and passage to and from the vehicle, especially during comfort stops
- ✓ Safety of the party during a comfort stop
- ✓ Safety of the party in the event of an accident or breakdown
- ✓ Larger parties consider specific delegation of small groups to individual adult supervisors for the entire journey (travel groups)
- ✓ Baggage is safely stowed
- ✓ All members of the party clearly understand what freedom they have to 'roam' on ferries, trains etc or use comfort facilities on any transport
- ✓ Any bookings on public transport are made early enough to ensure the party can travel together
- ✓ Travel sickness medication is only administered with the written authorisation of parents or carers
- ✓ The planning and confirmation for any special need
- ✓ The predicted weather or any other known circumstance will not hinder the safe passage of the journey
- ✓ Alternative plans will enable the journey to be completed in safety should there be a breakdown or other hindrance
- ✓ Transport and travel details should be left with the home base contact.
- ✓ A contingency may be required to inform parents of a late/early return.

Reference: HASPEV 127-129

School Minibuses/Drivers.

National as well as Local Authority regulations and guidance apply.

- The Headteacher and Governing Body are responsible for the maintenance of vehicle and driver standards.
- The driver is responsible for the vehicle during a journey and must observe all legal requirements, Local Authority Guidelines and School Policy
- Use abroad is subject to the prevailing regulations

Consider:

- ✓ Drivers must pass the Local Authority minibus test. Driver standards apply equally to hired passenger vehicles.
- ✓ Additional drivers may be needed on long journeys to allow for rest periods.
- ✓ The driver cannot be expected to supervise passengers. Additional staff may be required as supervisors.

Reference: HASPEV i32-135 and 139-142

Private cars

School staff, Parents and Volunteers may use their own vehicles to transport pupils.

Headteachers must ensure the safety of pupils travelling by this method and should:

- ✓ Decide that the driver is suitable
- ✓ Have parents written agreement
- ✓ Gain assurance on the main points of reference – insurance, licence, roadworthy, seatbelts, etc. A sample letter is appended
- ✓ Engage with the general Child Protection arrangements
- ✓ Ensure any payment arrangements are confirmed prior to the journey

Reference: HASPEV 136-138

Further Reference: HASPEV Planning transport 123-142, Bradford Guidance for Passenger Carrying Vehicles, www.rospa.com

Contacts for Advice: Occupational Safety Unit. Tel: Wendy Bland 01274 431751.
Social Services Transport Section. Tel: Errol Guest 01274 437959

INFORMATION FOR PARENTS PARTICIPANTS AND LEADERS

The Group Leader will need to ensure that essential information is disseminated between Parents, Participants, and adult supervisory staff (including contractors) as well as Managers approving the visit.

Informing Parents

Parents should understand the nature of the visit and activities as fully as possible so that they may consent on an informed basis. Written information to Parents may include:

- ✓ Programme arrangements e.g. activities, proposed venues, aims, dates, start and finish time.
- ✓ Names of key staff leading the visit.
- ✓ Travel arrangements. Departure and return times/place. Food, luggage requirements. Details of travel company.
- ✓ Accommodation address and contact arrangements. Standards and rooming arrangements.
- ✓ Alternative activities and other contingencies in case of bad weather, staff illness, etc.
- ✓ Safety Assurances. Full information of any Special hazards.
- ✓ Risk Statement. Where Adventure Activities are undertaken parents should be informed that whilst safety arrangements are paramount, the activities are hazardous by their nature. Parents and Participants must accept that a certain degree of risk is involved with each chosen activity. Where advanced programmes allow higher levels of risk-taking, the nature of this should be explained to parents.
- ✓ Cost, Method of Payment and Cancellation arrangements.
- ✓ Emergency contact arrangements at school and visit base.
- ✓ Insurance arrangements and the nature of the cover. E.g. public liability, personal accident, etc.
- ✓ Clothing requirements and kit list. Prohibited items. Spending money.
- ✓ Pre entry requirements e.g. water confidence, age ranges, inoculations.
- ✓ Rules and expectations of the conduct of participants. Sanctions for misbehaviour.
- ✓ Special arrangements e.g. dietary provision, religious or cultural arrangements, wheelchair access.
- ✓ How changes/updates to rolling programmes will be notified e.g. Sporting fixtures.

Consent, Medical and Emergency Information (See example Form Appendix B).

Information is confidential and should be treated with discretion. Written information is required for all members of the party (including supervisors):

- ✓ Written consent for anyone under 18.
- ✓ Emergency contacts. Name, address and telephone numbers of next of kin.
- ✓ Medical information.
- ✓ Special Needs and dietary requirements.
- ✓ Other information e.g. religious and cultural issues.

Briefing Parents and Pupils.

Parents and Participants should be given the opportunity to attend a briefing session, particularly for residential and more complex programmes. Separate briefing sessions may be more appropriate. As well as the details above briefing would include:

- ✓ Addressing questions and concerns. Engaging Pupils and parents in the risk management process
- ✓ Agree personal standards of behaviour and conduct. Sanctions for misbehaviour.
- ✓ Give roles of staff and other adults
- ✓ Emergency Procedures
- ✓ A record of the meeting, including attendance, and issues arising may be useful.

ACCIDENT AND EMERGENCY PROCEDURES

First aid

Cover is required throughout the excursion.

- ✓ Supervisors must hold a current valid First Aid Qualification, unless other qualified First Aiders can be quickly reached.
- ✓ Appropriate first aid and emergency equipment must be readily available at all times.

Emergency Arrangements

The school should have a plan for what to do in the event of an accident or serious incident. There are two aspects to this:

- A. What happens at the scene of the accident/ incident.
- B. What happens at school.

A. In the event of an accident or serious incident involving one or more of the participants, the Group Leader (or Activity Leader until Group Leader is in a position to take charge) should:

1. Assess the situation
2. Safeguard uninjured members of the group (i.e. ensure they are supervised to a place of safety).
3. Attend to the casualty/ casualties.
4. Inform those who need to know, viz
 - i) Emergency services as appropriate
 - ii) Group leader/ other activity leaders (if school led visit), or Activityprovider (if provider led visit). The activity provider will contact the Group leader who will make all necessary further contacts, i.e.
 - iii) School/ Home contact, with details of incident i.e. date and time; names of those involved; action taken; action to be taken.
 - iv) Embassy/ Consulate if abroad.

IF SITUATION INVOLVES FATALITY, LIFE THREATENING INJURIES OR MULTIPLE CASUALTIES WITH MAJOR INJURIES, THE GROUP LEADER WILL ACTIVATE THE LEA'S FATAL/ SERIOUS INJURIES PLAN BY RINGING THE NUMBER ON THE YELLOW CARD

(Further details are to be found on the Occupational Safety Website - <http://www.bradford.gov.uk/scsafety> Username = SOS, Password = lookout).

As soon as possible, the Group Leader should write down all relevant facts, witness details etc as appropriate. Log action taken after the incident and complete an accident report form.

Do not speak to the Media or discuss legal liability with other parties.

B. School/ Home contact should be available 24 hours/ day, (second contact as reserve).

1. Ensure Group Leader is managing situation, whether any assistance required from school.
2. Contact parents (accurate contact details essential e.g. mobile numbers).
3. Liaise with LEA and/ or governing body.
4. Report incident using appropriate forms.

Reference : HASPEV 240-250

Emergency Contacts

Staff will need to carry or have ready access to Emergency contact numbers. It is useful to have alternatives e.g. both landline and mobile contacts, and to know which contacts are most likely to respond. Essential Contacts include:

- ✓ 24hr School/Home base
- ✓ Residential base
- ✓ Visit Leader and other Staff, for support and assistance
- ✓ Parents or other Emergency carer
- ✓ Mobile phone for participants, if appropriate.
- ✓ 999, Emergency Services if abroad. Consider Local Services e.g. Medical Centre
- ✓ The Councils Emergency Card for Serious Incidents.

Missing Persons: Staff (and participants, where appropriate) should be clear about procedures for leave and return to any given base e.g. residential base, central meeting point, and coach.

- ✓ Give clear return times. Return checked by a reliable person
- ✓ Ensure that a response can be quickly initiated if a person is missing persons.
- ✓ This is crucial where those missing may be in danger e.g. on a caving trip.
- ✓ Participants will need to know how to respond if they become lost or separated from the group.

Reporting and recording accidents and near misses

- ✓ Staff know procedure
- ✓ The Visit leader may need to take immediate action to prevent recurrences.
- ✓ Accidents and near misses should prompt a review of risk assessments.

Cost and Financial Management

The issue of charging for educational visits will be covered by the school's Charging Policy.

Essentially, educational visits fall into one of two distinct categories:

- *Necessary* – i.e. mainly within the school day;
part of the National Curriculum;
part of a public exam syllabus;
statutory requirement relating to R.E.
- *Optional Extra* – any activity not deemed necessary
i.e. ski trip, evening panto visit etc.

For 'Necessary' activities, schools may ask for a voluntary contribution subject to the usual provisos, (see your school's charging policy).

If a 'necessary' activity includes a residential stay, the school may charge for the board and lodging element, though parents in receipt of certain benefits, including Income Support, may have such costs remitted.

For 'Optional Extra' activities, schools may charge the full cost, which may not include an element of subsidy to cover non-payment.

It is advisable that parents are informed of the proposed costs of a visit, and their agreement sought, as early as possible in the planning stage.

Reference: HASPEV 54-63

Insurance

Schools which subscribe to the "All Risks" insurance package administered by the Council's Insurance Section, (presently 95% of all schools), now have School Journey cover automatically for every Educational Visit.

This means schools no longer have to arrange specific insurance every time they organise a trip.

This blanket policy includes:

- Medical and Associated Expenses (including Worldwide Emergence Medical Assistance)
- Personal Accident
- Cancellation/ Curtailment Expenses
- Personal effects and money
- Legal Liability (Third Party)

Further detailed guidance, including exclusions where appropriate, can be found in school's copy of the Schools Insurance Manual (2001). If you are considering arranging a trip involving an activity that is excluded under this general policy, contact the Insurance Section on 01274 432779 to ascertain whether it will be possible to arrange alternative cover.

Schools which make their own arrangements independently of the LEA scheme need to satisfy themselves that they are adequately covered for every aspect of their visit.

It is advisable that information to parents includes details of the cover which the school is arranging, so that they can arrange additional cover if appropriate e.g. expensive personal items beyond the scope of the LEA policy.

Ref; HASPEV 143-15 Schools Insurance Manual (2001) section1.6

RISK ASSESSMENT

What is Risk Assessment?

Put simply, it is the process by which potential *hazards* are identified and *control measures* put in place to reduce the *risk* of someone being harmed.

Hazard = something which might cause harm

Risk = likelihood of someone being harmed by the hazard

Control Measures = steps taken to reduce risk to an acceptable level

Why should educational visits be Risk Assessed

- ✓ Your safety management will be enhanced. Remember, 'It is better to plan and not need it, than to need it and not plan'.
- ✓ DfES identifies Risk Assessment as an essential aspect of good practice.
- ✓ It is a legal requirement that educational visits are Risk Assessed.

Who should carry out Risk Assessment?

In the context of an Educational Visit, the Group Leader is usually the most appropriate person to carry out Risk Assessments. Always consult with EVC, Headteacher or designated senior manager, or, where appropriate, the LEA's Educational Visits Adviser. (Whoever carries out a Risk Assessment must be deemed by the Head to be competent to carry it out.)

When should Risk Assessment take place?

For Risk Assessment to be effective, foreseeable hazards need to be considered early in the planning process so that control measures can be identified and if necessary, put in place.

It is helpful to consider three principal types of Risk Assessment.

1. **Generic**

Generic assessments are, as their name suggests, general assessments relating to a visit, activity or location, identifying common hazards. They may be generated within school or accessed from an external provider. They would be appropriate and sufficient for a regularly occurring visit in which the group remains essentially the same and the hazards remain constant (e.g. Y1 walk to local park, Y9 football team away fixture).

2. **Specific**

Specific assessments are particular to a given visit. They may be site specific e.g. for a new venue, or visit specific, bearing in mind the particular needs of the group or individuals within the group. Specific assessments will identify particular 'danger spots', and will try to anticipate variable factors (weather, water levels, other users etc). They will also identify additional control measures necessary so that members of the group with particular needs (medical, physical etc) can be included in the activity. A generic risk assessment which is modified to take account of a different venue or individual needs would constitute a specific risk assessment. This assessment shows a leaders awareness of where special care is required.

3. **Ongoing** or **Dynamic**

Ongoing assessments are the judgements a leader makes during the course of a visit which are not pre-planned. They will be required when an unforeseen change of plan is made necessary (accident to pupil/ member of staff, sudden change in weather conditions, unexpected event etc). When generic and specific assessments are embedded in the planning of a visit, the Group Leader is better placed to make ongoing assessments as the need arises.

Health and Safety law requires that Risk Assessments made prior to a visit should be recorded. This is evidence that hazards have been identified and control measures considered.

Format

There are a plethora of Risk Assessment formats available, from a variety of sources. It is strongly recommended that the format you employ should be simple and direct. Avoid obscure technical language and complex numerical rankings for likelihood of risk. In essence, your Risk Assessment format needs to focus on two areas,

- a) Hazards and who might be affected
- b) What you are going to do to reduce the risk of harm

A 3-column framework would meet this need, and an exemplar is included in Appendix A.

If your own format already furnishes this information, stick with it.

Contracted Providers need to give assurances that they have their own Risk Assessments for specialist activities, transport standards etc. Detailed copies of these assessments are not generally required, as Group Leaders cannot be assumed to have the expertise to judge whether the assessments are valid or not. However, providers should inform visitors of significant dangers and clearly identify where visiting leaders and participants are expected to contribute to the management of safety. This information should be requested before the visit to assist planning. Advice should be sought if the Group Leader is concerned about the Providers safety arrangements.

MONITORING AND REVIEW

The last stage in the Risk Assessment process is Monitoring and Review. Monitoring is necessary to ensure that agreed control measures were effectively put in place. Review will identify where control measures were less successful than anticipated. As with planning for a visit, best practice in reviewing the effectiveness of control measures will take into account the views of those who attended the visit.. Brief notes made as part of a de-briefing session by the Group Leader should be sufficient to record significant ongoing assessments that had to be made. Alongside logs of accidents and near misses, this will inform planning for subsequent visits.

In Conclusion

Risk Assessment is not a piece of paper, it is a process. It begins with the recognition of potential hazards and the identification of control measures. The process concludes with a review of the Risk Assessment which will highlight any recommended amendments in the event of further visits.

The more people involved the better. The best Risk Assessments are collaborative. All adults involved in a visit should have copies of, and opportunity to contribute to/ comment upon Risk Assessments for that visit.

Good practice points to the involvement of pupils, at a level appropriate to their age and maturity, in thinking about hazards and being aware of the importance of control measures.

Risk Assessment assumes a discussion about hazards and what to do about them. Written Risk Assessments are the evidence that such a discussion has taken place.

PART 2. **TYPES OF VISIT**

OUTDOOR AND ADVENTUROUS ACTIVITIES

Competence Requirements and Activity Guidelines (in the form of a Generic Risk Assessment) are given for a broad range of Adventure Activities including some less specialist Outdoor Activities which still require special care, experience and some training e.g. paddling, country walking.

School Staff Leading Adventure Activities must be registered with the Local Authority as an approved leader. Listed below:

IN REMOTE OPEN COUNTRY (Above 600m or more than 30minutes easy walk to the nearest accessible road)

Hill and Mountain Walking – including Moorland (summer/winter), orienteering

IN ANY ENVIRONMENT

Land-based: Climbing, Caving, Gorge Scrambling, River Walking, Off Road Cycling, Skiing.

Water-based: Sailing, Windsurfing, Canoeing, Kayaking, Rafting, Swimming in Open Water

Leader Competence Requirements are given in this Section. Leader Registration is not required for:

Non Remote Walking, Camping and Orienteering; Cycling on Roads, Limited Resort Skiing, Simple Group Initiative Exercises, Paddling in the Sea, Lakes or Streams or when working under the overall direction of an AALA Licensed Outdoor Centre e.g. Doe Park Water Activities Centre.

Outdoor Centres providing Adventure Activities are required to hold a licence stating which activities they are eligible to lead. A centre is not required to hold a licence for climbing walls, canoeing on very small lakes and canals, paddling, swimming or walks/cycling in non remote countryside. However safety reassurances should be given. (Reference HASPEV para 157-180).

All Activities listed are subject to the standard Schools Notification Procedure

BRADFORD COUNCIL ACTIVITY LEADER REGISTRATION SCHEME

GUIDANCE NOTES

Bradford Schools Youth Service and Social Service staff leading Adventurous Activities MUST be registered with the Bradford Adventure Activities Leader Registration Scheme. (The scheme does not apply to AALA licensed providers; Bradford Duke of Edinburgh Award Doe Park Water Activities Centre Bradford Adventure Development Ingleborough Hall OEC Buckden House OEC)

WHAT ADVENTUROUS ACTIVITIES DO I NEED TO BE REGISTERED FOR?

REMOTE OPEN COUNTRY (Above 600m or more than 30minutes easy walk to the nearest road)

Hill and Mountain Walking – including Moorland (Summer / Winter), Orienteering.

IN ANY ENVIRONMENT

Land-based: Climbing, Caving, Gorge Scrambling, River Walking, Off Road Cycling, Skiing.

Water-based: Sailing, Windsurfing, Canoeing, Kayaking, Rafting, Swimming in Open Water

(Activity Standards give further details of competence requirements)

HOW DO I REGISTER?

1. **For each activity complete a Registration Form (Appendix 5) and attach: -**
 - National Coaching/Leadership Award or Local Validation (originals required).
 - First aid certificate.
 - Log of recent experience (2 years) e.g. copy of NGB logbook.
2. Send this to the Educational Visits Advisor, Education Client Team, Future House, Bolling Rd, Bradford, BD4 7EB. For Advice telephone: 01274 385585.
E-mail: jim.hughes@bradford.gov.uk
3. An appropriate assessor will approve registration for each Activity. Certificates will be returned along with the assessment Outcome.
4. An application to upgrade your registration may be made at anytime by re-registering.
5. The Educational Visits Advisor will maintain the Register of Approved Leaders. Periodic requests to show that Leaders are currently active will be made. Leaders may receive a practical monitoring visit.

CAN I LEAD GROUPS ONCE I AM REGISTERED?

The Head/Manager makes the final decision. Registration approves your activity competence, however the Head will decide if you have the appropriate personal qualities to be in charge of each designated group.

CITY OF BRADFORD METROPOLITAN DISTRICT COUNCIL

ADVENTURE ACTIVITY LEADER REGISTRATION FORM

Please read the Guidance notes before completing this form

A Separate form must be used for each Activity

LEADERS DETAILS			
Name: Address:		School/Establishment: Address:	
Telephone: Email:		Telephone: Email:	
ACTIVITY (include Level and/or Locations) e.g. Single Pitch Climbing			
QUALIFICATION or LOCAL AUTHORITY VALIDATION (list below) (send your most recent/highest level certificate of assessment plus first aid certificate)			
Course	Date	Provider	Office Use
EXPERIENCE. Indicate overall experience. Send Log of last 2yrs e.g. NGB logbook			Office Use
REFERENCES			
Name: Address/Establishment:		Name: Establishment/Address:	
Telephone: Email:		Telephone: Email:	

Please return to: Educational Visits Adviser, Education Client Team, Future House Bolling Rd, Bradford, BD4 7EB. For Advice telephone: 01274 385585. Email: jim.hughes@bradford.gov.uk

LEADER COMPETENCE REQUIREMENTS – LAND BASED ADVENTURE ACTIVITIES

- ✓ All activities listed below are subject to the standard Notification Procedure.
- ✓ **Leaders must be approved through the Local Authority Registration Scheme** for all listed Activities. Except where 'Leader Registration not required' is stated
- ✓ Leaders should refer to the Standards and Generic Risk Assessments for each Activity

ACTIVITY LEVEL	MAXIMUM RATIO LEADER; PARTICIPANT	LEADER QUALIFICATION/ REQUIREMENT
LOW LEVEL COUNTRYSIDE WALKING		
Simple Country Walking Very well defined pathways, close to habitation.	1: 15 (additional 10 per assistant)	Site/Route specific risk assessment. Leader Registration not required.
Non- Remote Countryside journeys. Below 600m/within 30minutes easy access of habitation	1: 12 (additional 12 per assistant)	BELA or Route specific risk assessment by experienced walker. Leader Registration not required.
HILL AND MOUNTAIN WALKING (including remote moorland)		
Low Hill and Moorland Walks	1:12 (Max 12)	WGLA (Walking Group Leader Award)
Supervision of unaccompanied low hill and moorland walks and expeditions	1:group (+ additional groups per assistant) (Max group size 12)	WGLA + extensive experience
Mountain walks and overnight 'wild' camps	1:12	MLA
Supervision of unaccompanied mountain walks and expeditions	1:group (+additional groups per assistant) (Max group size 12)	MLA + extensive experience
LIGHTWEIGHT CAMPING		
Low Level Camping.	1: 12 (additional 12 per assistant)	BELA or experienced camper. Leader Registration not required.
'Wild Camping'	1:12	MLA
WINTER HILL WALKING and MOUNTAINEERING		
Mountain Walks - may include single night at specified location	1:8 (up to 12 with assistant)	Winter MLA
Overnight Expeditions - not restricted.	1:8 (up to 12 with assistant)	MIC
Winter Mountaineering. Use rope	1:4 (up to 8 with assistant)	MIC
ORIENTEERING		
School Sites Local Park Simple Fixed Courses	1:Class Size 1+assistant:20 (additional 10 per assistant)	Leader Registration not required. → BOF → L1(Teacher/Leader) → Prior Experience
Non-Remote Area. Fixed Courses. Local Parkland and Woodland. Within 30mins easy walk of habitation	1+assistant :20	Leader Registration not required. → BOF Level 2/3 (Instructor) → Experienced Orienteer
Remote. Hill and Moorland. More than 30mins easy walk from habitation or prearranged transport	1:10 with at least 2 competent staff	BOF Coach Level 4 or Mountain Leader with substantial experience of delivering orienteering events

ACTIVITY LEVEL	MAXIMUM RATIO LEADER; PARTICIPANT	LEADER QUALIFICATION/ REQUIREMENT
OFF ROAD CYCLING/MOUNTAIN BIKING		
Non-Technical tracks and bridleways in non- mountainous areas.	1+ assistant: 10 (Max 10)	OTC Level 1 MBL award or BSCA MBL award or BCF Level 1 MBL award (+ML/WGL as appropriate)
Technical tracks and bridleways in non- mountainous areas.	1+ assistant: 10 (Max 10)	OTC Level 2 MBL award or BCF Level 2 MBL award (+ML/WGL as appropriate)
Mountain areas – not restricted	1+ assistant: 10 (Max 10)	OTC Level 3 MBL award(+MLA) MBIA Level 2 or SMBLA Level 3
ON ROAD CYCLING		
Carefully considered journeys	1+ assistant: 10	Leader Registration not required. Risk Assessment by experienced leader.
SKIING AND SNOWBOARDING		
Artificial Ski Slope	1: 12	Club Instructor
Downhill. Resort. Controlled skiing outside ski school. Limit to familiar slopes advised by ski school.	1+ assistant: 10	Experienced Skier. Leader Registration not required
Downhill. Resort Package. Resort leadership outside ski school.	1+ assistant: 10	Alpine Ski Leader Award
Downhill. Teaching and leading	1+ assistant: 10	BASI 3
Cross Country		BASI 3 Nordic
ROCK CLIMBING		
Single Pitch Crags (non serious, non tidal) and Climbing Walls	1:6 (additional 6 per assistant) (Max 2 ropes each)	SPA
Intermediate/Advanced Single Pitch Climbing	1:6 (additional 6 per assistant) (Max 2 ropes each)	MIA
Multipitch Climbs/Rock Scrambles	1:2 (4 with assistant)	MIA
CAVING		
Simple, non-serious, non-remote, no ropes. Specified Caves	1: 12 (Max 12)	LCLA Level 1 or Local Authority Validation by CIC
Other Specified Caves with no pitches	1+ assistant: 10 (Max 10)	LCLA Level 1
Ladder and Line Pitches <18m Specified Caves	1+ assistant: 6 (Max 6)	LCLA Level 2
Caving (inc SRT) not restricted	1+ assistant: 6 (Max 6)	CIC
GORGE-WALKING, RIVER-WALKING, GORGE-SCRAMBLING		
Restricted to specified Gorges	1: 12 (Max 12)-simple gorge 1(+ assistant): 8- technical gorge	Local Authority Validation by CIC/MIA with appropriate water safety awareness.
Not restricted	1: 12 (Max 12)-simple gorge 1+ assistant: 8- technical gorge	CIC/MIA with appropriate water safety awareness.
SEA CLIFF TRAVERSING		
Easy or short traverses	1: 12	MIA with water safety awareness
Extended technical traverse	1+ assistant: 8	MIA with water safety awareness
GROUP INITIATIVE EXERCISE		
Higher Risk Exercises. Water or Height Risk. Technical Equipment used.	1:12	Local Authority Assess or appropriate qualification
Non Technical use of equipment	1: 12	Risk Assessment. Leader Registration not required

STANDARDS FOR LOW LEVEL COUNTRYSIDE WALKING

Low Level Countryside Walking is defined by a broad range of environments from local parks and countryside areas to dales valley walks and moorland fringes. The hazards presented will differ in each Countryside area. The School should approve each venture with this in mind ensuring that the Walk Leader has substantial experience of similar ventures, knows the area well, how it would be affected by poor weather conditions and is able to manage the group accordingly. Adventure Activity Leader Registration is not required however advice should be sought from the Educational Visits Advisor where doubt exists.

Competence to lead

Activity Level	Max Ratio. Leader: Participant	Competence Requirements/Indicators
Parkland. Simple Country Walks. Very well defined pathways, close to habitation	1:15 (additional 10 per assistant)	Leader Registration not required. → Site/Route Specific Risk Assessment → Experienced Country Walker → Local Knowledge → Teacher/Youth Worker.
Non-Remote Countryside. Below 600m/within 30 minutes easy access of habitation	1:12 (additional 12 per assistant)	Leader Registration not required. → BELA → WGL or MLA training → Experienced Hill Walker → Site/Route Specific Risk Assessment → Local Knowledge → Teacher/Youth Worker.
Care should be taken not to stray beyond the defined areas. A separate remit exists for Hill and Mountain Walking. Where boundaries are unclear especially for more remote ventures advice should be sought from the Educational Visits Adviser.		

An Assistant would need to play a positive role in the safety management of the group, including rendering aid and/or summoning assistance in an emergency. Assistants must have proven experience and a good knowledge of the area. Responsibility remains with the Activity Leader to check that assistants are competent and provide overall supervision.

Special Conditions

1. The Standards apply to summer conditions only, i.e. Snow/ice/sleet/heavy rain is neither prevailing nor forecast. Generally British Summer Time, Daylight Hours.
2. Non Remote Countryside refers to areas below 600m, which have well defined tracks and pathways with easy escape (Max time 30mins on foot), to habitation or group transport left on a nearby road. Suitable areas would be enclosed by well defined and reliable boundaries e.g. roads, walls or rivers.
3. The Standards do not include entry to water. River crossing should be at bridges. Refer to separate guidance for paddling.
4. The Standards do not include any kind of Scrambling or Climbing Activity.

General Requirements

Leaders will need to follow their establishments' general procedures for disseminating information between parents, participants, group leaders, instructors and other supervisors; care and use of equipment; and accidents/emergencies.

Reference and Advice

- www.theaward.org for Duke of Edinburgh Award Expeditions.
- www.bst.org.uk for British Sports Trust who administer Basic Expedition Leader Award. i.e. Level 2 Community Sports Leader Award.

Low Level Countryside Walking Leaders are expected to have the judgement and experience to anticipate and deal with hazards, on an ongoing basis. The following risk assessment outlines the generic Hazards for Low Level Countryside Walking. Activity Guidelines outline the corresponding standards that would be expected of Leaders in managing these risks.

Hazards (What can go wrong?)

Problems most often arise from a combination of factors.

Leaders, Assistants and Participants are at risk of:

1. **Serious Falls** from cliffs, outcrops, ridges, rock steps, large boulders, rocky terrain, or into potholes, open shafts or gorges.
2. **Slips, trips and stumbles** on uneven surfaces. All made worse by wet conditions, slippery slopes, poor footwear, high winds, silly behaviour poor coordination or tiredness.
3. **Injury from stone fall** or larger rock falls, particularly below loose, exposed cliffs.
4. **Cold and exhaustion leading to Hypothermia** caused by:
 - **Poor or changeable weather conditions** i.e. cold, rain, and wind, particularly if the group are inadequately dressed/ equipped, and do not have sufficient food or (hot) drink.
 - **Route is too difficult** for the group, carrying **too heavy a load**, are **unfit**, have **ill-fitting boots** and develop **blisters. Sprained ankles.**
 - **Navigational errors** particularly in poor visibility (i.e. fog, mist or darkness).Group become lost.
 - **Poor supervision**, group walking at different speeds or wandering off, group members become separated from the party.
5. **Hot weather conditions** i.e. heat and direct sunlight leading to heat stroke/Hypothermia, sunburn, exhaustion through dehydration. Group do not carry enough to drink.
6. **Medical difficulties** and recent illnesses made worse through activities, leading to emergency medical situations. E.g. heart attack, angina, asthma attack, diabetic coma.
7. **Drowning** caused by swimming or wading into rivers, streams and lakes particularly when fully clothed, in strong currents, on slippery rocks or where children could be swept off their feet even in gentle currents. Cold water shock and hypothermia leading to seizure, serious cramps or respiratory problems e.g. asthma attack. River and stream crossing at stepping stones.
8. **Lightening.**
9. Difficulties increase following **Accident/Incident.**
10. **Road traffic** hits walkers on busy roads, narrow country lanes, no street lights, and blind bends.
11. **Poisons.** Insect bites, fungi, drinking poor quality water.
12. **Abuse** by farmers and other land users.

Activity Guidelines for Low Level Countryside Walking.

These correspond generally to the numbered Hazards above but may contribute to the overall protection of other hazards.

1. Leaders should be aware of any special hazards present on the planned route and take suitable precautions. **Avoid cliff edges and deep shafts.** Lead safe routes on slopes and rock steps and supervise closely.
2. **Protective footwear** (e.g. boots, trainers for easy paths) which is appropriate to the terrain should be worn. Not high heels or platform shoes. Whilst it is impossible to avoid all trips and slips it is possible to give warnings and support as appropriate e.g. hidden steps, slippery rock, 'stop running.'
3. **Do not walk below loose rock areas.**
4. **Check a weather forecast.** Leaders should **be aware of early signs of deteriorating conditions.**

Leaders should ensure that their **group wear or carry suitable amounts of warm, wind and waterproof clothing (Including hat, gloves and spare jumper), and adequate food and drink.**

Leader should **be vigilant towards early signs of cold and tiredness** and take remedial actions.

Leaders are expected to **be competent in the use of a map**, and able to navigate in poor visibility.

The leader must **keep the group in sight to avoid separation.**

Leaders need to **plan routes that are appropriate to fitness levels** of their least able participants, taking into consideration the loads carried. If early problems are spotted routes can be adjusted or abandoned.

First aid provision should anticipate blisters and sprains.

5. The leader must ensure that people **drink enough fluid** to avoid dehydration. **Suncream, sunglasses, sunhats, light clothing** covers body to protect from sunburn and heat exhaustion.
6. The leader needs to **be aware of the group's medical conditions** and **have details/contacts to hand**; select appropriate routes and **carry medication** e.g. inhalers, glucose tablets.
7. The leader should **prevent people from paddling or swimming in lakes, streams and rock pools**. If the Leader wishes to do these activities as part of the walk they should be specifically approved in the planning process. Refer to Standards for paddling or swimming. **Rivers and streams should be crossed using appropriate bridges. Stepping Stones should generally be avoided. If used the leader would need to be able to easily walk through the water along any part of the crossing to rescue a fallen party.**
8. Retreat if a lightening storm is threatening. **Do not shelter under boulders, cliffs or in small Sit on a dry rucksack on open ground.**
9. Details of the walking area/route **including return time should always be left with a responsible person at base**. In the event of an overdue situation, base should be able to make appropriate checks and response. This may include an appropriate search and rescue.

Appropriate equipment should be carried and leaders aware of its usefulness particularly for emergencies. Kit may include: emergency shelter, survival bag, spare clothing, hat/gloves, emergency food/drink, lighting, spare map, whistle, first aid kit, walking poles, mobile phone.

Following an accident initial action should include; keep the group together, deal with casualties; decide on best course of action. If the leader sends others for help s/he must be confident that they can achieve this without further incident. Very clear instructions need to be given (preferably written) giving the location of casualties.

10. **Vigilance** is required whilst walking on or crossing country roads. Walk on same side as oncoming traffic. Check put blind bends. Consider using luminous/bright clothing. Plan appropriate crossing points for busy roads ensuring careful supervision.
11. Don't drinking from streams, eat wild berries, mushrooms, etc unless you know specifically that they are safe.
12. **Respect access agreements and other land users.**

STANDARDS FOR HILL AND MOUNTAIN WALKING (including remote moorland)

The Mountain Leader Training Board UK. (See references below) set the standards for training and assessment. Leaders need to have current knowledge of the relevant training scheme and keep their practice up to date.

Competence to lead

Activity Level	Max Ratio. Leader: Participant	Minimum Qualification
Low Hill and Moorland Walks	1:12 (Max 12)	WGLA (Walking Group Leader Award)
Supervision of unaccompanied low hill and moorland walks and expeditions	1:group (+ additional groups per assistant) (Max group size 12)	WGLA + extensive experience
Mountain walks and overnight 'wild' camps	1:12	MLA
Supervision of unaccompanied mountain walks and expeditions	1:group (+additional groups per assistant) (Max group size 12)	MLA + extensive experience

An Assistant would be able to play a positive role in the safety management of the group, including rendering aid and/or summoning assistance in an emergency. Assistants must have proven experience and a good knowledge of the area. Responsibility remains with the Activity Leader to check that assistants are competent and provide overall supervision.

Special Conditions

1. The Standards apply to summer conditions only, i.e. Snow/ice is neither prevailing nor forecast.
2. Hill and Mountain refers to any area of the UK that is more than 30 minutes easy going on foot to the nearest accessible road *and* is either uncultivated moorland at any altitude *or* on a mountain above 600m.
3. WGLA holders are restricted to non-mountainous areas that (a) are enclosed by well defined and reliable boundaries e.g. roads, walls or rivers (areas that border mountain regions and do not have well defined boundaries are excluded); (b) can be exited by the group to an accessible road within 3hours; (c) do not require movement (in either planned or unplanned situations) on steep or rocky terrain.
4. Unaccompanied groups would be expected to have undertaken a thorough programme of training and preparation such as that undertaken by candidates of the Gold Duke of Edinburgh Award Expedition.
5. Scrambling activities where use of rope is planned or anticipated does not fall within the ML/WGL remit

General Requirements

Leaders will need to follow their establishments' general procedures for disseminating information between parents, participants, group leaders, instructors and other supervisors; care and use of equipment; and accidents/emergencies.

Reference and Advice

Web based.

- www.mltuk.org for training schemes. Email info@mltuk.org
- www.thebmc.co.uk for clubs, access, technical reports, mountaineering. Email: office@thebmc.co.uk
- www.aala.org described under *trekking*. Gives advice, definitions and standards of competence
- www.theaward.org for Duke of Edinburgh Award Expeditions.

Key Organisations

- British Mountaineering Council. 177-179 Burton Rd, Manchester, M20 2BB. Tel 0161 455 4747
- Mountain Leader Training UK. Siabod Cottage, Capel Curig, Conwy LL24 OET. Tel 01690 720272
- Adventure Activities Licensing Authority, 17 Lambourne Crescent, Llanishen, Cardiff, CF4 5GG. Tel. 01222 755 715

Hill and Mountain Leaders are expected to have the judgement and experience to anticipate and deal with hazards, on an ongoing basis. The following risk assessment outlines the generic Hazards for Hill and Mountain Walking. Activity Guidelines outline the corresponding standards that would be expected of Leaders in managing these risks.

Hazards (What can go wrong?)

Problems most often arise from a combination of factors.

Leaders, Assistants and Participants are at risk of:

1. **Serious Falls** from cliffs, outcrops, ridges, rock steps, large boulders, rocky terrain, or into potholes, open shafts or gorges. Caused by slips, stumbles, loose rock, soil and vegetation, or travelling too fast down hill. All made worse by wet conditions, slippery slopes, (e.g. grass, snow), poor footwear, high winds, silly behaviour or tiredness.
2. **Injury from stone fall** or larger rock falls, particularly below loose, exposed rock areas, in narrow gorges or whilst travelling on scree slopes. Rock fall caused by higher climbers/walkers including members of your own party.
3. **Hypothermia** and exhaustion caused by:
 - **Poor or changeable weather conditions** i.e. cold, rain, and wind, particularly if the group are inadequately dressed/ equipped, and do not have sufficient food or (hot) drink.
 - **Route is too difficult** for the group, carrying **too heavy a load**, are **unfit**, have **ill-fitting boots** and develop **blisters. Sprained ankles.**
 - **Navigational errors** particularly in poor visibility (i.e. fog, mist or darkness).Group become lost.
 - **Poor supervision**, group walking at different speeds or wandering off, group members become separated from the party.
4. **Hot weather conditions** i.e. heat and direct sunlight leading to heat stroke/Hypothermia, sunburn, exhaustion through dehydration. Group do not carry enough to drink.
5. **Medical difficulties** and recent illnesses made worse through activities, leading to emergency medical situations. E.g. heart attack, angina, asthma attack, diabetic coma.
6. **Drowning** caused by swimming or wading into rivers and lakes particularly when fully clothed, in strong currents, on slippery rocks or where children are swept off their feet even in gentle currents. Cold water shock and hypothermia leading to seizure, serious cramps or respiratory problems e.g. asthma attack.
7. **Lightening.**
8. Difficulties increase following **Accident/Incident.**
9. **Road traffic** hits walkers on narrow country lanes, no street lights, and blind bends.
10. **Poisons.** Insect bites, fungi, drinking poor quality water.
11. **Burns/Fire** caused by camping stoves.
12. **Abuse** by farmers and other land users.

Activity Guidelines for Hill and Mountain Walking.

These correspond generally to numbered Hazards above but may contribute to the overall protection of other hazards.

1. Leaders should be aware of any special hazards present on the planned route and take suitable precautions. E.g. **Avoid cliff edges; lead safe routes on steep slopes/rock steps** and supervise closely. Protective footwear **with good tread, a positive heel grip and ankle support should normally be worn. Planned use of a rope does not fall within the scope of the M.L.A. but a light rope (U.I.A.A. Not less than 8.5mm diameter/25mtres long) may be used in some cases, for security on steep ground or for confidence roping over short distances for individuals who are unsure or anxious about that particular part of the journey. This does not lend itself to scrambling or extended/planned use of the rope.**
2. **Avoid loose rock areas;** if reasonably stable **move ahead with caution** leaving an appropriate gap (close or distant) between party members to reduce the chance of injury from rock or stone fall. **Traverse scree slopes and avoid climbing directly below others** on rock steps.

3. **Check a weather forecast** before venturing into the hills and adjust routes accordingly. Leaders should **be aware of early signs of deteriorating conditions**. Leaders should ensure that their **group wear or carry suitable amounts of warm, wind and waterproof clothing (Including hat, gloves and spare jumper), and adequate food and drink.** Leader should **be vigilant towards early signs of hypothermia** and take remedial actions.

Leaders are expected to **be competent in the use of map and compass**, and able to navigate in very poor visibility. Global Positioning Systems, if carried should be used in conjunction with map and compass. These devices should not be relied upon totally, as they are designed to allow error within the co-ordination system for military reasons. The leader must **keep the group in sight to avoid separation.** Leaders need to **plan routes that are appropriate to fitness levels** of their least able participants, taking into consideration the loads carried. If early problems are spotted routes can be adjusted or abandoned.

4. The leader must ensure that people **drink enough fluid** to avoid dehydration. **Suncream, sunglasses, sunhats, light clothing** covers body to protect from sunburn and heat exhaustion. **First aid provision should anticipate blisters and sprains.**
5. The leader needs to **be aware of the group's medical conditions** and **have details/contacts to hand**; select appropriate routes and **carry medication** e.g. inhalers, glucose tablets.
6. The leader should **prevent people from swimming in mountain lakes, streams and rock pools.** These bodies of water are often deep and cold and also contain a large amount of weed and drop off ledges. Particularly wet clothing, boots, etc may lead to negative buoyancy, and cold-water shock leads to swimming difficulties. **Extreme caution should be exercised if crossing rivers and streams can not be avoided. DO NOT CROSS if strong currents/high water levels are encountered or if children are likely to be swept off their feet in gentle currents.**
7. Retreat from peaks if a lightening storm is threatening. **Do not shelter under boulders, cliffs or in small caves. Sit on a dry rope or rucksack on open ground away from the peak if caught in a storm.**
8. **A route card including return time should always be left with a responsible person at base.** In the event of an overdue situation, base should be able to effect an appropriate search and rescue. **Appropriate survival equipment should be carried and leaders trained in its use.** Kit may include: emergency shelter, survival bag, spare clothing, hat/gloves, emergency food/drink, lighting, spare map and compass, whistle, first aid kit, emergency rope, walking poles, mobile phone.

Following an accident initial action should include; keep the group together, deal with casualties; decide on best course of action. If the leader sends others for help s/he must be confident that they can achieve this without further incident. Very clear instructions need to be given (preferably written) giving the location of casualties.
9. **Vigilance** is required whilst walking on or crossing country roads. Walk on same side as oncoming traffic. Check out blind bends. Consider using luminous clothing/torch, etc at night.
10. **Specific knowledge** and caution is required when drinking from streams, eating wild berries, mushrooms, etc. Consider carrying water purification tablets, boiling water, using insect repellent.
11. **Specific training** and caution is required with camping stoves. Carry fuel in sealed container/separate compartment. Carefully consider appropriate, well ventilated cooking area inside or outside tent.
12. **Respect access agreements and other land users.**

STANDARDS FOR ORIENTEERING

Orienteering courses can be set in a broad range of environments such as school sites, local parks, woodland and moorland. Bradford has many mapped areas and fixed courses. This guidance is intended for teachers/Leaders using these fixed sites as well as contained areas in school grounds, local parks and woodland. The Leader qualifications referred to those set by the British Orienteering Federation (see reference below). The hazards presented will differ in each area. The School should approve each venture with this in mind ensuring that the Leader has substantial experience of similar events, knows the area well, how it would be affected by poor weather conditions and is able to manage the group accordingly. Adventure Activity Leader Registration is not required for non remote contained areas however advice should be sought from the Educational Visits Advisor where doubt exists.

Competence to lead

Activity Level	Max Ratio.Leader: Participant	Competence Requirements/Indicators
School Sites Local Park Simple Fixed Courses	1:Class Size 1+assistant:20 (additional 10 per assistant)	Leader Registration not required. → BOF Level 1 Coach (Teacher/Leader) → Prior Experience → Site Specific Risk Assessment → Local Knowledge → Teacher/YouthWorker.
Non-Remote Area. Fixed Courses. Local Parkland and Woodland. Within 30mins easy walk of habitation	1+assistant :20	Leader Registration not required. → BOF Level 2/3 Coach (Instructor) → Experienced Orienteer → Site Specific Risk Assessment → Local Knowledge → Teacher/Youth Worker.
Remote. Hill and Moorland. More than 30mins easy walk from habitation or prearranged transport	1:10 with at least 2 competent staff	BOF Coach Level 4 or Mountain Leader with substantial experience of delivering orienteering events

An Assistant would need to play a positive role in the safety management of the group, including rendering aid and/or summoning assistance in an emergency. Assistants must have proven experience and a good knowledge of the area. Responsibility remains with the Leader to check that assistants are competent and provide overall supervision.

Special Conditions

- The Standards apply to summer conditions only, i.e. Snow/ice/sleet/heavy rain is neither prevailing nor forecast. Generally British Summer Time or Daylight Hours.
- Non Remote Areas refers to areas which have well defined tracks and pathways with easy escape (Max time 30mins on foot), to habitation or group transport left on a nearby road. Suitable areas would be enclosed by clear boundaries e.g. roads, fences. Obvious Hazards such as busy traffic, crags and fast/deep water would not normally be present. Any such Hazards would need careful protection e.g. suitable placement of staff.
- Those leaders wishing to use more remote areas should refer also to the standards and risk assessment for Hill and Mountain Walking.

General Requirements

Leaders will need to follow their establishments' general procedures for disseminating information between parents, participants, group leaders, instructors and other supervisors; care and use of equipment; and accidents/emergencies.

Reference and Advice

- www.britishorienteering.org.uk
- British Orienteering Federation. 'Riversdale', Dale Road North, Darley Dale, Matlock, Derbyshire DE4 2HX . Telephone: + 44 (0) 01629 734042 (answerphone 5pm - 9am)

Orienteering Leaders are expected to have the judgement and experience to anticipate and deal with hazards, on an ongoing basis. The following risk assessment outlines the generic Hazards for Orienteering. Activity Guidelines outline the corresponding standards that would be expected of Leaders in managing these risks. A site specific risk assessment would need to be carried out for each area used.

Hazards (What can go wrong?)

Problems most often arise from a combination of factors.

Leaders, Assistants and Participants are at risk of:

1. **Serious Falls** from cliffs, outcrops, ridges, rock steps, large boulders, rocky terrain, or into potholes, open shafts or gorges.
2. **Slips, trips and stumbles.** All made worse by wet conditions, slippery slopes, poor footwear, high winds, running too fast, silly behaviour poor coordination or tiredness.
3. **Cold and exhaustion leading to Hypothermia** caused by:
 - **Poor or changeable weather conditions** i.e. cold, rain, and wind, particularly if the group are inadequately dressed/ equipped, and do not have sufficient food or (hot) drink.
 - **Poor planning. Route is too difficult** for the group, are **unfit, inexperienced**, have **ill-fitting footwear** and develop **blisters. Sprained ankles.**
 - **Navigational errors, panic, get lost** particularly in poor visibility (i.e. fog, mist or darkness). Course too hard, lose map/map disintegrates, no clear boundaries, controls hidden
 - **Poor supervision, poor briefing.** Group don't listen to instruction, copy controls wrongly, forget compass/ whistle
4. **Hot weather conditions** i.e. heat and direct sunlight leading to heat stroke/Hyperthermia, sunburn, exhaustion through dehydration. Group do not carry enough to drink.
5. **Medical difficulties** and recent illnesses made worse through activities, leading to emergency medical situations. E.g. heart attack, angina, asthma attack, diabetic coma.
6. **Drowning** caused by swimming or wading into rivers, streams and lakes particularly when fully clothed, in strong currents, on slippery rocks or where children could be swept off their feet even in gentle currents. Cold water shock and hypothermia leading to seizure, serious cramps or respiratory problems e.g. asthma attack.
7. **Lightening.**
8. Difficulties increase following **Accident/Incident.**
9. **Road traffic** hits runners on busy roads, narrow country lanes, no street lights, and blind bends.
10. **Poisons.** Insect bites, fungi, drinking poor quality water.
11. **Abuse** by farmers and other land users. Stranger danger.

Activity Guidelines for Orienteering.

These contribute to the overall protection of outlined hazards.

1. Orienteering requires structured **planning, organisation and appropriate briefing** of participants with regard to behaviour, the limitations of the area and potential Hazards. It is difficult to control individual actions after set off; hence the course planning and preparation is critical and must take into account the ability, experience and fitness levels of the group. An understanding of concepts such as 'decision points', 'handrails' and 'catching features' are useful. It is not normally good practice to send participants out on a long course. Out and back exercises are useful so that competence, morale and safety can be checked. Participants having been taught at least the basic skills of Orienteering before they set out is an important key to safety.
2. **Younger children, beginners and people with special needs will require extra supervision.** Normally an adult would be at the start/finish and one other adult would be monitoring on the course and can respond to emergencies.

3. Leaders should be aware of any **special hazards** present in the area and take suitable precautions to ensure runners avoid major hazards such as cliff edges, deep shafts, and water hazards. E.g. Place a member of staff at appropriate points, careful placement of controls. If relevant participants should be instructed not to wade into lakes, streams and rock pools. Rivers and streams should be crossed at appropriate points and rising water levels monitored carefully.
4. **Appropriate footwear** (e.g. boots, trainers) would depend on the experience of the group matched to the terrain. Not high heels or platform shoes. Whilst it is impossible to avoid all trips and slips it is possible to give warnings. Hidden steps, slippery rock, 'don't run.'
5. **Check a weather forecast.** Leaders should **be aware of early signs of deteriorating conditions.** Don't be afraid to cancel the planned activities. Give plenty time for participants to return before dark.
6. Leaders should ensure that their **group wear or carry suitable amounts of warm, wind and waterproof clothing (Including hat, gloves and spare jumper), a whistle and adequate food and drink.** This will be determined by the nature of the course and the experience of participants. Adequate **Shelter** should be provided at base. **Maps and markers should generally be waterproof.**
7. Leader should **be vigilant towards early signs of cold and tiredness** and take remedial actions.
8. Leaders are expected to **be competent in the use of a map and compass** and able to navigate efficiently in poor visibility.
9. The leader must ensure that people **drink enough fluid** to avoid dehydration. **Suncream, sunglasses, sunhats, light clothing** covers body to protect from sunburn and heat exhaustion.
10. The leader needs to **be aware of the group's medical conditions** and **have details/contacts to hand**; select appropriate routes and **carry medication** e.g. inhalers, glucose tablets. **A qualified First Aider must be to hand. First aid provision should anticipate blisters and sprains.**
11. **Retreat if a lightning storm is threatening.** Do not shelter under boulders, cliffs or in small caves. Sit on a dry rucksack on open ground.
12. A clear **return time** must be given and the importance stressed of **reporting back** regardless of course completion. Safety procedures and phone numbers are useful, on maps or control cards. In the event of an overdue situation, base should be able to make appropriate checks and response. E.g search, casualty care, accounting for rest of group without causing further incident.
Appropriate equipment should be to hand and leaders aware of its usefulness for emergencies. **Kit may include: emergency shelter, survival bag, spare clothing, hat/gloves, emergency food/drink, lighting, spare map, whistle, first aid kit, walking poles, mobile phone.**
13. **Vigilance** should be advised whilst crossing roads. A supervisor may need to be used at appropriate crossing points for busy roads.
14. Don't: drink from streams; eat wild berries, mushrooms, etc unless you know that they are safe.
15. Respect access agreements and other land users. For lone runners, particularly children, vigilance is advised with regard to approach by strangers.

STANDARDS FOR ROCK CLIMBING (including Abseiling, Bouldering and Scrambling)

The Mountain Leader Training Board UK. (See references below) set the standards for training and assessment. Leaders need to have current knowledge of the relevant training scheme and keep their practice up to date.

Competence to lead

Activity Level	Max Ratio. Leader: Participant	Qualification
Single Pitch Crag (non serious, non tidal) and Climbing Walls	1:6 (additional 6 per assistant) (Max 2 ropes each)	SPA
Intermediate/Advanced Single Pitch Climbing. Teaching Leading	1:6 (additional 6 per assistant) (Max 2 ropes each)	MIA
Multipitch Climbs and Rock Scrambles	1:2 (4 with assistant)	MIA

The minimum contribution of an Assistant would be to play an active part in the supervision of the group, including response to an emergency. The Activity Leader would need to be confident of the assistants' competence before allowing them to make technical safeguards. Safe belaying technique is particularly important. Responsibility remains with the Activity Leader to check and supervise assistants.

Special conditions

1. The Standards apply to summer conditions only, i.e. no snow or ice.
2. **Climbing Walls.** As well as the Bradford minimum standard (SPA), Commercial Climbing walls will have their own requirements. **Schools with Climbing Walls** should have their internal systems vetted by an appropriate Technical Adviser (MIA/MIC). Staff/Students belaying will normally be required to be under the direct supervision of an SPA qualified leader.

General Requirements

Leaders will need to follow their establishments' general procedures for disseminating information between parents, participants, group leaders, instructors and other supervisors; care and use of equipment; and accidents/emergencies.

Reference and Advice

Web based.

- www.mltuk.org for training schemes. Email info@mltuk.org
- www.thebmc.co.uk for clubs, access, technical reports, climbing walls. Email:office@thebmc.co.uk
- www.aala.org for definition of climbing and associated advice/standards.

Key Organisations

- British Mountaineering Council. 177-179 Burton Rd, Manchester, M20 2BB. Tel 0161 455 4747
- Mountain Leader Training UK. Siabod Cottage, Capel Curig, Conwy LL24 OET. Tel 01690 720272
- Adventure Activities Licensing Authority, 17 Lambourne Crescent, Llanishen, Cardiff, CF4 5GG. Tel. 01222 755 715

Rock Climbing Leaders are expected to have the judgement and experience to anticipate and deal with hazards, on an ongoing basis. The Generic Hazards for Single Pitch Rock Climbing (including Abseiling, Bouldering and Scrambling) are given. Activity Guidelines outline the corresponding standards that would be expected of Leaders in managing these risks.

Hazards (What can go wrong?)

Leaders, Assistants and participants are at risk of:

1. **Falls from the top of the cliff**, caused by slips, trips, loose rock, wet rock or grass, high wind, participants moving around, pushing each other. Smooth soled footwear.
2. **Falls from steep (scrambling) ground** around the crag; causes as above.
3. **Falls whilst climbing** unroped (soloing or bouldering).
4. **Injury from stone fall**, rock fall. Injury caused by larger areas of loose rock.
5. Falls caused by **anchor failure**.
6. Falls caused by **main belay failure**.
7. Falls caused by **failure to tie into rope and harness correctly**.
8. Falls caused by **failure to belay correctly** or pulled off ground/off cliff edge causing them to let go of the rope. Failure to communicate between belayer and climber
9. Injuries and distress to climber **falling on traverse, limbs stuck** in cracks, or **crag fast** climber.
10. Falls or **trapped fingers, hair**, etc., distress whilst abseiling.
11. Falls caused by **equipment failure**.
12. **Medical conditions and recent injuries** made worse through activities/leading to accidents e.g. heart conditions, back problems, asthma, and epilepsy.
13. Further accidents happening resulting from and following an **accident/emergency**.
14. Angry farmers and other climbers!
15. **Lightening**

Activity Guidelines for Rock Climbing

These correspond generally to the numbered Hazards above but may contribute to the overall protection of other hazards. Activity leaders should be aware of any special hazards at the planned location (loose rock, steep or exposed descent paths, etc.) and take suitable precautions. These hazard 'hot spots' should be risk assessed for each location used.

1. The Leader must approach the top of the crag with care, exerting firm control of the group. Particular care must be taken on steep approaches and slippery, wet, loose or grassy surfaces and where smooth soled footwear is worn e.g. rock boots, trainers. The Leader must judge the best means of protection i.e. safety line, physical support or very close supervision, and ask, "Can I prevent a slip from becoming a serious fall?"
2. All participants should be in sight of Leaders unless otherwise directed. Leaders must decide when to allow participants unroped on easy scrambling ground and when protection is required according to ability, temperament and the consequences of a fall. Special attention should be paid to unaccompanied participants moving between locations (eg. bottom to top of crag). If appropriate, they should be shown the route to be followed and made aware of potential hazards.
3. Do not allow solo climbing. U.I.A.A. approved safety ropes should be used to protect all participants climbing at height. The Leader must set a height limit for 'bouldering' activities ensuring that good spotting techniques are applied and taking particular account of hazards in the landing area. Novice bouldering should be supervised.
4. U.I.A.A. approved helmets must be correctly fitted and worn for all outdoor climbing. Areas of loose and unstable rock should be avoided.
5. All anchor points should be inspected before use i.e. for loose or fractured rock around anchor point, trees live and firmly rooted. No movement from boulders, rock-rock threads touching, bolts and stakes in good condition and well placed - no rust or movement. The Leader must not use 'dubious' anchors.

6. All main belays should employ as a minimum either: a) two 'solid' independent artificial anchors (eg. nuts, pegs, bolts, stakes, camming units). Sole use of camming units is not recommended, or, b) one bomb proof natural anchor. In all cases, two independent attachments should be used, suitably linked (angle of belay less than 120 degrees) in order to stabilise the belay, both capable of acting independently if the other fails. Locking (2200kgs minimum) krabs should be used.
7. A sit harness, which supports weight at back of thighs, must be used for all climbing activities. Before climbing, the Leader must check that it is correctly fitted and that fastening buckles are locked off. Attachment to the rope should be as recommended by manufacturer. (Normally, using fig. 8 knot or bowline + stopper knot with tail). If attachment by karabiner is used, care should be taken that the loading on the krab is not across the gate. Locking krabs must be used. A system for double-checking attachments before climbing is strongly encouraged.
8. Leaders must teach, apply and supervise correct belaying. (Belay devices used according to manufacturers recommendations). When using a belay plate (eg. sticht plate, ATC, Bug) the user must be behind and close to the plate and be able to pull the loose rope back to hold a falling climber.
Participants and assistants who are allowed to belay must be trained and tested repeatedly before being allowed to belay independently. Very close supervision is required throughout with the loose end of the rope held by a third party in case the belayer fails to hold a fall.
A top rope belayer must be tight on the anchors so they are not pulled over the edge (at top). Or for bottom ropes the belayer should be anchored to the ground if not heavy enough to hold a falling climber.
Clear communication and understanding between belayer and climber should be encouraged from the start, particularly emphasising no slack rope exists in the system, particularly before lowering.
9. Care should be taken to protect climbers on traverse. The Leader must be able to lock off a fallen or stranded climber, escape from the system and deal with problems as appropriate. Lowering an injured climber to the ground will generally be the best option but the Leader should have the ability to reach a cragfast climber. Care should always be taken to ensure that the Leader has a suitable safeguard.
10. Abseiling should incorporate a safety back up system. With novices, a safety rope and a releasable abseil anchor system should be used. For more experienced abseilers, the use of an autobloc, or other techniques can be considered.
11. All critical items of equipment must conform to an appropriate CE standard i.e. Ropes, Harness, Helmet, karabiners, slings, etc and must be used in accordance with manufacturer specifications.
During Activities protect rub points, especially where ropes run over edges. Ensure single krabs are loaded correctly and the gate locked. Ensure static ropes are not used in dynamic situations. Check that participants own equipment shows no visible signs of damage.
After Activities check for damage e.g. when coiling ropes. Damaged equipment must be removed from use. Independent checks need to be made periodically. Ensure Equipment is removed at the end of recommended lifetime.
12. Leaders to check medical details and discuss concerns, before activities start. Ensure activities and safety arrangements are appropriate.
13. For Emergency use the Leader should have available, as a minimum, a first aid kit and a spare rope. Consider carrying prussik loops and a knife. If transport is not within 10 minutes easy reach of the crag, extra emergency equipment must be considered. E.g. group shelter, survival bag.
14. Due consideration should be given at all times to any access restrictions and all efforts made to minimise the impact on the environment and other crag users.
16. Evacuate crag if threatened by lightning.

LEADER COMPETENCE REQUIREMENTS – WATER BASED ACTIVITIES

- ✓ All activities listed below are subject to the standard Notification Procedure.
- ✓ **Leaders must be approved through the Local Authority Registration Scheme** for all listed Activities. Except where 'Leader Registration not required' is stated.
- ✓ Leaders should refer to the Standards and Generic Risk Assessments for each Activity

ACTIVITY LEVEL	MAXIMUM RATIO LEADER; PARTICIPANT	LEADER QUALIFICATION/ REQUIREMENT
CANOEING AND KAYAKING		
Doe Park Water Activities Centre (Safety boat Active)	As below	Canoe Safety Test (+2 star) And Centre Assessment. Leader Registration not required
Very sheltered waters i.e. quiet canals, very small lakes, suitable sections of very slow moving rivers (not rapids)	1: 8 (kayak)	BCU Level 1 Coach Or BCU Level 2 trainee
	1: 6 (solo open boats)	
Sheltered water i.e. small lakes, slow running rivers (not rapids), suitable sections of larger lakes	Kayak - 1: 8 (+ 4 per assistant)	BCU Level 2 Coach
	Open Boat - 1: 8 (max 4 boats) 1: 6 (solo)	
Large loch activities in sheltered bays close to suitable beaches	Kayak - 1: 6 (+ 4 per assistant)	BCU Level 2 Coach trained for area with 4 Star (Sea)
	Open Boat - 1 + assistant: 8 (Max 4 boats)	BCU Level 3 Coach (Canoe)
Large loch - journeys	Kayak - 1 + assistant: 6	BCU Level 3 Coach trained for area with 4 Star (Sea) or Level 3 Coach (Sea)
	Open Boat - 1 + assistant: 8 (Max 4 boats)	BCU Level 3 Coach (Canoe)
White Water Grade II	Kayak - 1 + assistant: 6	BCU Level 3 Coach (Inland)
	Open Boat - 1 + assistant: 8 (Max 4 boats)	BCU Level 3 Coach (Canoe)
Advanced White Water Grade III and above	Kayak - 1 + assistant: 4	BCU Level 3 Inland Coach with 5 Star
	Open Boat - 1: 2 (max 2 boats)	
Sea and Surf		Endorsement by Local Authority and appropriate BCU qualification

SAILING		
Sailing Centre e.g. Doe Park (including Safety boat cover)	Ratios as below	Centre Requires AALA Licence. Centre Rules Apply. For Doe Park: RYA Assistant Instructor or Level 2 Proficiency and Centre Assessment. Leader Registration not required
Inland Water (Safety boat cover required. One Safety boat per group. Max 6 dinghies)	<u>Crewed Dinghies</u> 1: 3 for beginners with instructor on board. 1: 9 (Max 6 boats) e.g. 3 Wayfarers with 3 in each or 4 toppers with 2 in each	RYA Senior Instructor. or RYA Instructor with site specific Local Authority Endorsement. Plus additional person to give Level 2 Power boat Safety cover with site/activity specific training.
	<u>Single Handers</u> 1: 6 only when boats are used as single handers	
Sea/Tidal Waters-from a suitable harbour or beach	As above	As above with Costal Endorsement
Coastal Journeys	As above	Advanced Instructor Costal

STANDARDS FOR CANOEING AND KAYAKING

The British Canoe Union (See references below) set the standards for training and assessment. Leaders need to have current knowledge of the relevant training scheme and keep their practice up to date.

Competence to lead

ACTIVITY LEVEL	MAX RATIO LEADER: PARTICIPANT	LEADER QUALIFICATION
Doe Park Water Activities Centre (Safety boat active)	As below	Canoe Safety Test (+2 star) and Centre Assessment. Leader Registration not required
Very sheltered waters i.e. quiet canals, very small lakes, suitable sections of very slow moving rivers (not rapids)	1: 8 (kayak)	BCU Level 1 Coach Or BCU Level 2 trainee
	1: 6 (solo open boats)	
Sheltered water i.e. small lakes, slow running rivers (not rapids), suitable sections of larger lakes	Kayak - 1: 8 (+ 4 per assistant)	BCU Level 2 Coach
	Open Boat - 1: 8 (max 4 boats) 1: 6 (solo)	
Large loch activities in sheltered bays close to suitable beaches	Kayak - 1: 6 (+ 4 per assistant)	BCU Level 2 Coach trained for area with 4 Star (Sea)
	Open Boat - 1 + assistant: 8 (Max 4 boats)	BCU Level 3 Coach (Canoe)
Large loch - journeys	Kayak - 1 + assistant: 6	BCU Level 3 Coach trained for area with 4 Star (Sea) or Level 3 Coach (Sea)
	Open Boat - 1+ assistant: 8 (Max 4 boats)	BCU Level 3 Coach (Canoe)
White Water Grade II	Kayak - 1 + assistant: 6	BCU Level 3 Coach (Inland)
	Open Boat - 1+ assistant: 8 (Max 4 boats)	BCU Level 3 Coach (Canoe)
Advanced White Water Grade III and above	Kayak - 1 + assistant: 4 Open Boat - 1: 2 (max 2 boats)	BCU Level 3 Inland Coach with 5 Star
Sea and Surf		BCU Level 3 Coach (Sea or Surf)

An Assistant would be able to play a positive role in the safety management of the group, including rendering aid and/or summoning assistance in an emergency. Assistants would be competent paddlers and be able to rescue a capsized canoeist in the given water conditions. Responsibility remains with the Activity Leader to check that assistants are competent and provide overall supervision.

Special Conditions

- Qualifications must be relevant to the discipline being delivered
- White water grades as defined by International Canoe Federation.

General Requirements

Leaders will need to follow their establishments' general procedures for disseminating information between parents, participants, group leaders, instructors and other supervisors; care and use of equipment; and accidents/emergencies.

Reference and Advice

Web based.

- www.bcu.org.uk
- www.aala.org described under *trekking*. Gives advice, definitions and standards of competence.

Key Organisations

- British Canoe Union. John Dudderidge House, Adbolton Lane, West Bridgford, Notts NG2 5AS
Tel: 0115 9821100 Fax: 0115 9821797
- Adventure Activities Licensing Authority, 17 Lambourne Crescent, Llanishen, Cardiff, CF4 5GG. Tel. 01222 755 715

Canoe Coaches are expected to have the judgement and experience to anticipate and deal with hazards, on an ongoing basis. The following risk assessment outlines the generic Hazards for Canoeing and Kayaking. Activity Guidelines outline the corresponding standards that would be expected of Leaders in managing these risks.

Hazards (What can go wrong?)

Problems most often arise from a combination of factors.

Leaders, Assistants and Participants are at risk of:

1. **Drowning** resulting from one or more of the following circumstances:

- Cold water shock
- Person can't swim or float
- Clothing too heavy
- Person unconscious in water
- Exhaustion
- Hypothermia
- Trapped in upturned kayak. Spraydeck not releasable
- Unable to get to land/rescue boat due to strong wind especially offshore wind, winds blow group apart
- Particular medical condition e.g. epilepsy, asthma

In Sea, Rivers and Surf

- Trapped under turbulent water i.e. stoppers, waves, waterfalls
 - Pinned under water by rocks or trees
 - Unable to get to land/rescue boat due to turbulent water i.e. waves, rapids, tidal currents.
2. **Hypothermia** arising from one or more of the following:
- immersed can lead to body heat loss faster than body heat production
 - Exposure to cold weather, wet conditions, wind chill particularly in deteriorating weather conditions, after immersion and when exhausted
 - Inadequate clothing
3. **Injury** resulting from:
- Collision with other boats especially large sailing boats, motorboats and larger craft moving at speed
 - Hit by paddle, especially to head and face
 - Collision with rocks, trees, river bottom, metal spikes on old weirs, river debris
 - Lifting/Manoeuvring heavy and waterlogged boats
4. **Illness** caused by
- Pollutants
 - Leptospirosis (Weils disease)
 - Blue green algae

Activity Guidelines for Canoeing and Kayaking

These respond to the hazards identified above.

1. The Leader's experience must be sufficient to understand when water temperature, weather conditions, wind strength and direction, river levels and the state of tides could pose a significant threat to the safety of Participants. He/she must be able to maintain group control in the prevailing conditions and particularly know when to get off the water, if conditions become too hazardous.
2. The Leader should be a confident paddler and be able to rescue a capsized or struggling canoeist in the given water conditions i.e. perform deep water rescue, throwline rescue, tow other canoeists, escort swimmers to river bank.
3. The Leader's personal clothing and equipment should ensure they can operate safely and comfortably in the prevailing conditions without concern for their own well-being. They must be able to devote all attention to the welfare of Participants. However care should be taken through sensitive awareness to ensure that they do not divorce themselves from the conditions experienced by Participants, particularly early signs of hypothermia, and exhaustion.
4. The Leader must be conversant in artificial resuscitation, the signs and treatment of hypothermia and casualty care in a canoeing environment. They must carry appropriate emergency equipment

(unless it is immediately accessible on shore). Emergency provision must include a First Aid Kit, emergency shelter, and dry clothing. Provision according to circumstances could include: group bivvy shelter, repair kit, hat and gloves, spare clothing, torch, map and compass, whistle, food and hot drink, spare paddles, flares, towlines, throwlines and dry bags.

5. The Leader must be informed of the swimming ability/water confidence of all Participants. Non-swimmers must be very closely supervised and be able to confidently tread water (whilst wearing a buoyancy aid or life jacket) in the given water conditions. In addition, the Leader must give particularly close support to Participants at risk of epileptic fits, asthma attacks or other medical conditions.
6. The Leader must be confident that all Participants can get out of a capsized kayak or canoe. Training in capsize drill must be undertaken by all, before getting afloat. Leaders should instruct Participants to hang onto the end grabs of kayak / canoes as an additional floatation device.
7. Leaders must ensure that Participants can learn in a safe area, free from the risk of collision with larger boats, or being swept into trees, rocks or rapids. If Participants are unable to paddle against wind, the Leader should reduce the group size or change venue until they can maintain good group control. Leaders must ensure that the hazards encountered e.g. rapids, trees, stoppers, waves are appropriate to the group's ability and levels of fitness particularly on rivers, large lakes, the sea and in surf.
In all environments, Leaders must ensure that they are able to give clear signals to canoeists e.g. hand signals, paddle signals, whistle, etc.
8. Buoyancy aids must be worn by all Participants when on or near the water. Buoyancy aids must conform to the current European standard and be fit for purpose. I.e. have enough buoyancy to conform to the 50N matrix. be the correct size fastened correctly. If spray decks are used they must be fitted with a release strap and the Participants must be trained to releasing them.
9. Canoes and kayaks must be fit for purpose. Particularly they should be fitted with:
 - At least 12 kgs of positive buoyancy to enable a flooded vessel to float approximately horizontally.
 - End grabs which do not trap hands
 - Footrests (as appropriate). Bulkhead footrests where impact forces may trap or injure ankles.
 - Where fitted, deck lines must be securely attached and not impede the cockpit area
10. All participants must wear clothing which is appropriate to the water temperature and prevailing conditions. If prolonged immersion is anticipated, wet suits are recommended. The use of a canoe cag is recommended at all times of year. Light, protective footwear e.g. training shoes should be worn.
11. Helmets must be worn on rivers and in surf. In addition, if the Leader considers that Participants are at risk of head injuries from collision with paddles or other craft, then helmets should be worn. Participants should be instructed to be careful with paddles and to keep clear of other craft.
12. Leaders should ensure that good carrying technique is used particularly to guard against back injury.
13. Leaders undertaking sea, river or large lake journeys should leave details of their intended route and return time with a third party who can render assistance or summon emergency services in the event of failure to return.
14. Leaders should be aware of the water pollution level e.g. sewage, blue/green algae, etc. Particularly Leaders should be able to recognise the symptoms of weils disease and, if apparent, the casualty must be referred to the hospital immediately. It is recommended that Leaders ensure that any recent wounds are covered with a waterproof dressing prior to the activity, so as to reduce the risk of infection.
15. Leaders should be aware of access arrangements and trespass laws with regard to their intended Venue.

STANDARDS FOR DINGHY SAILING

The Royal Yachting Association (See references below) set the standards for training and assessment. Leaders need to have current knowledge of the relevant training scheme and keep their practice up to date. This Guidance relates to Dinghies. If Keelboats or Multihulls are used additional advice should be requested through the Adventure Activities Leader Registration scheme.

Competence to lead

Activity Level	Max Leader:Participant Ratio	Minimum Qualification
Sailing Centre e.g. Doe Park (including Safety boat cover)	Ratios as below	Centre Requires AALA Licence. Centre Rules Apply. For Doe Park: RYA Assistant Instructor or Level 2 Proficiency and Centre Assessment. Leader Registration not required
Inland Water (Safety boat cover required. One Safety Boat required for each group. Max 6 boats)	<u>Crewed Dinghies</u> 1: 3 for beginners with instructor on board. 1: 9 (Max 6 boats) e.g. 3 Wayfarers with 3 in each or 4 toppers with 2 in each	RYA Senior Instructor. or RYA Instructor with site specific Local Authority Endorsement. Plus additional person to give Level 2 Power boat Safety cover with site/activity specific training.
	<u>Single Handers</u> 1: 6 only when boats are used as single handers	
Sea/Tidal Waters-From a suitable harbour or beach (Safety boat cover as above)	As above	As above with Costal Endorsement for sailing and Level 2 powerboat qualifications.
Coastal Journeys. (Safety boat cover as above)	As above	Advanced Instructor Coastal with safety boat qualified cover

If used an Assistant would be able to play a positive role in the safety management of the group, including rendering aid and/or summoning assistance in an emergency. E.g. assist rescues from the safety boat. Competent sailors may act as a lead boat for novices. Responsibility remains with the Activity Leader to check that assistants are competent and provide overall supervision. Ratios can not increase.

Special Conditions

1. All Activities must have a Safety Boat in attendance, with an appropriately qualified Powerboat/Safety boat driver.
2. Qualifications should be relevant to craft used.
3. Leaders will be restricted to operate at specific sites through the Adventure Activities Leader Registration Scheme.

General Requirements

Leaders will need to follow their establishments' general procedures for disseminating information between parents, participants, group leaders, instructors and other supervisors; care and use of equipment; and accidents/emergencies.

Reference and Advice

- [Web based.](#)
- www.rya.org.uk

Key Organisations

- Royal Yachting Association. (RYA) RYA House, Ensign Way, Hamble, Southampton, SO31 4YA, Tel 0845 345 0400, Fax: 0845 345 0329 (Charged at local rate)

GENERIC RISK ASSESSMENT FOR DINGHY SAILING

Dinghy Sailing Instructors are expected to have the judgement and experience to anticipate and deal with hazards, on an ongoing basis. The following risk assessment outlines the generic Hazards for Dinghy Sailing. Activity Guidelines outline the corresponding standards that would be expected of Leaders in managing these risks.

Hazards (What can go wrong?)

Problems most often arise from a combination of factors.

Leaders, Assistants and Participants are at risk of

1. **Drowning** (following capsized or man over board) resulting from one or more of the following circumstances:

- Cold water shock
- Person can't swim or float
- Clothing too heavy
- Person unconscious in water
- Exhaustion
- Hypothermia
- Trapped in inverted dinghy after capsized
- Unable to get to land/rescue boat due to strong wind especially offshore wind, winds blow group apart
- Particular medical condition e.g. epilepsy, asthma

At coastal venues

- Capsized in strong tidal currents and races
 - Dinghies unable to sail from dangerous lee shores e.g. rocks, groins etc.
 - Unable to get to beach, a rescue boat due to turbulent water i.e. waves, tidal currents.
2. **Hypothermia** arising from one or more of the following:
 - Cold water immersion, especially when prolonged. Vigorous exercise when immersed can lead to body heat loss faster than body heat production
 - Exposure to cold weather, wet conditions, wind chill particularly in deteriorating weather conditions, after immersion and when exhausted
 - Inadequate clothing
 - **Injury** resulting from
 - Collision with other boats especially large sailing boats, motorboats and larger craft moving at speed
 - Hit by boom, especially to head and face
 - Collision with rocks, breakwaters, sea bed etc
 - Lifting/Manoeuvring heavy dinghies
 - **Illness** caused by
 - Pollutants
 - Leptospirosis (Weils disease)
 - Blue green algae

Activity Guidelines for Dinghy Sailing

These respond to the Hazards outlined above.

1. The Leaders' experience must be sufficient to understand when water temperature, 'weather conditions, wind strength/direction and the state of tides could pose a significant threat to the safety of Participants. He/she must be able to maintain group control in the prevailing conditions and particularly know when to get off the water, if conditions become too hazardous.
2. The Leader should be a confident sailor and be able to stand off a capsized dinghy and offer assistance to rescue craft. They should be able to perform a man overboard recovery and a capsized recovery.
3. The Leaders' personal clothing and equipment should ensure that they can operate safely and comfortably in the prevailing conditions without concern for their own well-being. They must be able to devote all attention to the welfare of Participants. However care should be taken through sensitive awareness to ensure that they do not divorce themselves from the conditions experienced by Participants, particularly early signs of hypothermia, and exhaustion.
4. The Activity Leader must be conversant in artificial resuscitation, the signs and treatment of

hypothermia and casualty care in a sailing environment. They must know how to use the emergency equipment carried in the rescue boat. Emergency provision must include a First Aid Kit, towing warps, throwing and heaving lines, appropriate anchors, exposure bags and dry clothing.

5. The Activity Leader must be informed of the swimming ability/ water confidence of all Participants. Non-swimmers must be closely supervised and able to confidently tread water (whilst wearing a buoyancy aid or life jacket) in the given water conditions. The Leader must give particularly close support to Participants at risk of epileptic fits, asthma attacks or other medical difficulties.
6. The Leader must be confident that all Participants can get out of a capsized boat, especially after an inversion. Activity Leaders should instruct Participants to remain in contact with the boat to avoid drifting away from the rest of the group.
7. Leaders must ensure that novices can learn in a safe area, free from the risk of collision with larger boats, or being swept on to rocks, breakwaters or into tidal races. If Participants using single handers are unable to sail efficiently against wind, the Leader should reduce the group size or change venue until they can maintain good group control. Leaders must ensure that hazards encountered e.g. lee shores, tidal races; waves are appropriate to the group's ability and level of fitness particularly on large lakes, the sea and in surf. It is advisable to set visual boundaries for the group i.e. buoys or fixed objects on the shore.
In all environments, Leaders must ensure that they are able to give clear pre-arranged signals to sailors e.g. hand signals, paddle signals, whistle, etc.
8. Buoyancy aids or Lifejackets must be worn by all Participants when on or near the water. Buoyancy aids must conform to the current European standard and be in a serviceable condition i.e. have enough buoyancy to conform to the 50N matrix. Activity Leaders must ensure that all Participants have the correct size of buoyancy aid and know how to fasten it correctly.
9. Boats must be fit for purpose. Particularly they should be fitted with:
 - Positive buoyancy to enable a flooded vessel to float approximately horizontally.
 - A painter of at least 4 metres
 - Toe straps that are securely fixed and adjusted to ensure that feet do not get trapped.
 - Any spare rope i.e. halyards should be coiled neatly and tidied away to prevent entrapment.
 - There should be no protruding strands in wire rigging and all shroud pins and split rings should be taped.
 - Sails are capable of being reefed afloat.
10. All participants must wear clothing appropriate to the water temperature and prevailing conditions. Normally wet suits are required. Light, protective footwear e.g. training shoes should be worn.
11. Leaders should ensure that good carrying practice is employed, particularly guard against back injury.
12. Leaders undertaking sea or large lake journeys should leave details of their intended route and return time with a third party who is competent to render assistance or summon emergency services in the event of failure to return.
13. Leaders should be aware of the water pollution level e.g. sewage, blue/green algae, etc. Particularly Leaders should be able to recognise the symptoms of weils disease and, if apparent, the casualty must be referred to the hospital immediately. It is recommended that Leaders ensure that any recent wounds are covered with a waterproof dressing prior to the activity, so as to reduce the risk of infection.
14. Leaders should be aware of access arrangements, launch fees, harbour dues and trespass laws with regard to their intended venue. Including any particular safety equipment required before being able to launch.
15. Leaders should ensure that appropriate safety cover is on standby and that all safety craft is driven by persons holding the appropriate qualifications.

PART 3

MANAGEMENT FRAMEWORK

The Primary Audience for this section is Headteachers, Governors and Service Managers.

As a Policy Document, it outlines roles and responsibilities at all levels of Safety Management from the Council to the participant.

The Council has ultimate responsibility for ensuring that appropriate safety management systems are in place for all off-site visits and activities. The key mechanisms for ensuring this are:

- School Visit notification procedures to give an overview of the range and type of school visits and particularly to identify visits which may require close monitoring and support.
- Monitoring of School based planning and management; visit based leadership.
- Adventure Activities Registration Scheme
- Documented Guidance. Advice and support through the Educational Visits Advisor and a range of services e.g. Insurance, Emergency Planning

Schools and other service areas are required to Approve ALL off-site visits and activities. Part 1 of this document outlines a model process for the Group Leader in charge of the visit to gain approval.

This section outlines the framework in schools for ensuring that the Group Leader is checked and supported. It does this by listing key responsibilities, particularly for the Head teacher and School Management team. All schools must work out the most appropriate mechanism for ensuring that their responsibilities are carried out.

The Council and Educational Visits Adviser will endeavour to ensure that good practice is shared between schools

The Legal Framework

Bradford Metropolitan District Council employees and volunteers are required to work within the framework set by the Bradford Guidance for Off-site visits and activities.

The guidance aims to reduce the likelihood of accidents and incidents to the lowest level and provide secure organisational and management practices to enable continued participation and development.

These Guidelines encapsulate the requirements and guidance in:

- Health and Safety at Work Act – 1974
- Adventure Activities (Young Person's Safety) Act - 1995
- Management of Health and Safety at Work Regulations – 1999
- Health and Safety of Pupils on Educational Visits – (HASPEV)
- Health and Safety – Responsibilities and Powers – DfES 0803/2001
- 3 supplements to HASPEV – DfES 2002

NB DfES guidance and supplements are provided online and may be updated or revised at any time.

The Management of Health and Safety at Work Regulations require employers to:

- assess the risks of activities
- introduce measures to control those risks
- tell their employees about those measures

Under Health and Safety legislation employees must:

- take reasonable care of their own and other's health and safety
- co-operate with their employers over safety matters
- inform the employer of any serious risks and any shortcomings in health and safety arrangements

These duties apply to all School and Community Development off site visits and activities.

All adults in charge of pupils have a common law duty to act as a reasonably prudent parent would do in the same circumstances.

OVERVIEW OF SCHOOL AND LOCAL AUTHORITY RESPONSIBILITIES

REQUIREMENT	RESPONSIBILITY
<ul style="list-style-type: none"> ▪ Guidance and Advice to Schools ▪ Generic Risk Assessment ▪ Monitoring, Training ▪ Insurance, Emergency Support 	Local Authority
School Policy for visits, activities and emergencies	Headteacher Governors
NOTIFICATION AND PLANNING	
Notification of Visits to Local Authority	Headteacher, EVC
Planning	Group Leader
Pre-Visit Risk Assessment	Group Leader, Contracted Provider
FORMAL APPROVAL	
School Staff leading Adventure Activities	Local Authority through Adventure Activity Leader Registration Scheme
All Visits	Governors, Headteacher, EVC
VISIT MANAGEMENT AND SUPERVISION	
Overall Risk Management on the Visit	Group Leader
Ongoing Risk Assessment on the Visit Duty of Care	Group Leader Any supervising adult
Home Based Support	EVC, Headteacher Local Authority Emergency Support
Review. Monitoring	Group Leader, EVC, Headteacher, Governors.

COUNCIL CODE OF PRACTICE FOR OFF-SITE VISITS AND ACTIVITIES

- ✓ The Bradford Guidelines for Off-site visits and activities set the parameters for each school or establishment operating under Bradford Metropolitan District Council.
- ✓ The Guidelines are appended by the DfES issued HASPEV Guidance (Health and Safety of Pupils on Educational Visits *plus supplements*). Both documents should be used by staff involved in the planning and supervision of visits
- ✓ The Guidelines will be reviewed at least annually. Any opinion or review generated observation should be forwarded to the Local Authority.
- ✓ The Guidelines put the onus of responsibility on each school or establishment to manage issues of health and safety and quality assurance internally as described in their school or department policy.
- ✓ The Council will delegate approval for all visits and permitted activities to Schools and departments within Community Development and Social Services. Formal Approval must be given in writing. A signature by the appropriate person on the Approval Form is sufficient.
- ✓ Council employees leading Adventure Activities must receive individual (not visit specific) Approval through the Leader Registration Scheme
- ✓ Where guidance or advice is required prior to formal approval, the Local Authority should be contacted as soon as possible.
- ✓ Schools will be required to notify the Local Authority of planned and intended visits biannually, giving rolling updates as requested.
- ✓ The Local Authority will robustly monitor and review arrangements for all off-site visits and activities.
- ✓ The Council retains the right to intervene and/or stop an off site visit or activity at any point during the activity or during the planning stage if there is any concern over the Health and Safety of children, young people or adults.
- × The Code of Practice and Guidance does not cover any activity arranged for Work Experience, College placement or emergency health or welfare related issue. These matters are dealt with under separate policy and guidance.

- ✓ The Council will provide a range of support to enable schools and establishments to operate at the highest standards and include:
 - Educational Visits Adviser
 - Occupational Safety Team
 - Generic Risk Assessments and Risk Assessment advice
 - Access to named specialist staff for advice
 - Outdoor Centres and Services within Education, Leisure and Community Development.
 - Insurance Department
 - Transport Department
 - Registered Body for CRB Checks
 - Pupil & Parent Services
 - Register of Approved Adventure Activity Leaders
 - Educational Visits Coordinator Training
 - Governor Training
 - Group Leadership Training
 - Adventure Activity Leadership Training and Assessment
 - Monitoring System
 - Emergency Planning and Support including 24hr telephone access
 - Dissemination of National Guidance relating to the Health and Safety and good practice during visits and activities

In managing the Health and Safety of pupils and adults, the Council has a responsibility to ensure the provision of all that is described within the above Code of Practice.

In addition, the Council will:

- ✓ Endeavour to share good practice between schools, departments and with neighbouring Authorities
- ✓ Seek advice externally where it is not available within the Council.
- ✓ Share lessons learned from accidents, incidents and near misses.
- ✓ Work with Staff to ensure that safety management systems are effective.

SCHOOLS CODE OF PRACTICE FOR OFF-SITE VISITS AND ACTIVITIES

- ✓ Each school must have a written policy for off site visits and activities. The policy will be reviewed annually.
- ✓ In schools where the LEA is the employer the school will formally adopt the Bradford Guidelines for Off-site visits and activities.
- ✓ In schools where the Governing Body is the employer, the governors' role will be the same as shown for the Council. It is recommended that Governors of these schools should adopt the Bradford Guidelines and be monitored by the Council
- ✓ The Bradford Guidelines put the onus of responsibility on each school or establishment to manage issues of health and safety and quality assurance internally as described in their school policy.
- ✓ The School will formally approve all visits and permitted activities.
- ✓ School Employees leading Adventure Activities must receive individual (not visit specific) Approval through the Leader Registration Scheme
- ✓ Where guidance or advice is required prior to formal approval, the LEA should be contacted as soon as possible.
- ✓ Schools will notify the Council of planned and intended visits biannually. Subsequently, certain types of visit must be notified as planned at least 2 weeks before departure.
- ✓ All **Notifications and Formal Approval** will be **given in writing**. For Approval a signature by the appropriate person on the Approval Form is sufficient.

SCHOOLS CODE OF PRACTICE FOR OFF-SITE VISITS AND ACTIVITIES

Roles & Responsibilities

The Governing Body

To fulfil its responsibility for the Health and Safety of pupils on off site visits and activities the Governing Body must:

- ✓ Determine and review the school's policy on off-site visits and activities
- ✓ Agree a method of approval for each type of visit. Assess proposals for certain types of visit that would normally include overnight stays and adventure activities
- ✓ Agree the organisational framework, support and emergency procedures for off site visits and activities.
- ✓ Ensure that each visit or activity has a stated educational objective and complies with the Council Guidelines and the school policy

The Governing Body must be satisfied that:

- ✓ They can understand objectives and are able to challenge ventures they are not clear about or do not appear to be realistic for the age and aptitude of the pupils concerned
- ✓ A competent person carries out risk assessments. Risk control systems and safety measures are in place. They do not need to become involved in risk assessment or related matters unless they have appropriate competence
- ✓ Where Governors give professional advice, they should ensure that their professional indemnity insurance will cover them for unpaid advice
- ✓ They are informed about less routine visits well in advance.
- ✓ The Headteacher/Group Leader can show how their plans comply with the Council Guidelines and school policy. Bookings should not be confirmed with providers until all necessary assurances have been obtained.
- ✓ Council Advice is sought as required.
- ✓ Formal reviews are completed and recorded of visits and activities.
- ✓ They understand what Governor training is available and relevant.
- ✓ The Headteacher and EVC have taken all reasonable and practicable measures to ensure inclusion of pupils irrespective of race, gender, ability, special need, or economic circumstance.
- ✓ The Headteacher and EVC are supported in matters relating to off site visits and activities and that they have appropriate time and expertise to fulfil their responsibilities.

SCHOOLS CODE OF PRACTICE FOR OFF-SITE VISITS AND ACTIVITIES

Roles & Responsibilities

Headteacher

Headteachers must ensure that off site visits and activities comply with the Bradford Guidelines for Off-site visits and activities and the school policy as determined by the Governing Body.

Headteachers must ensure that the Group Leader is competent to lead the visit monitor risks throughout a visit or activity and make appropriate decisions.

Headteachers must be clear about their role if taking part as a group member/supervisor. They should follow the instructions of the Group Leader who will have sole charge.

According to the school's policy agreed by the Governing Body, the Headteacher may give Formal Approval for certain types of off site visit or activity and delegate certain types of approval to the Education Visits Coordinator (EVC) with the agreement of the Governing Body. Similarly, certain other responsibilities may be formally delegated to the EVC.

Where circumstances change after Formal Approval has been granted, Headteachers must ensure the continued security of the venture or if necessary withdraw Formal Approval and cancel the visit or activity.

The Headteacher is responsible for ensuring:

- ✓ School's policy for off site visits and activities is implemented
- ✓ Bradford Guidelines are followed
- ✓ Details of any off site visits or activities are included in the Headteacher's report to the Governing Body, or its delegated members, giving the opportunity to question or challenge as necessary.
- ✓ Educational Visits Coordinator (EVC) is appointed or nominated and Council informed. Clear and specific duties will need to be agreed. Where there is no EVC, the responsibilities pass to the Headteacher by default.
- ✓ Awareness and compliance with relevant regulations and guidelines, including DfES HASPEV Guidance and its supplements
- ✓ Regularly review the school's policy for Off-site visits and activities.
- ✓ Ensure all staff involved in off site visits or activities have access to and understand their responsibility to follow the Council and school policies.
- ✓ Maintain a register of relevant staff, governors and volunteers who have signed the declaration indicating that they have read the Bradford.

- ✓ Guidelines for off-site visits and activities.
- ✓ Maintain an Off Site Visits File as the central source of detail of all off site visits or activities
- ✓ Ensure that every visit or activity is prepared, planned and managed appropriately and that staff/volunteers receive any appropriate briefing, induction or training
- ✓ Authorise directly, or by delegation to the EVC, all off site visits and activities
- ✓ School employees and volunteers who lead activities are suitably competent. Where appropriate, competence checks are made through the Councils Adventure Activities Leader Registration Scheme
- ✓ Ensure that Group Leaders have sufficient training and knowledge to undertake their responsibilities and that they are given sufficient time for all aspects of planning, preparation, pre-visits and risk assessment
- ✓ Ensure that effective child protection procedures are in place including appropriate CRB checks
- ✓ Determine the school's emergency procedures and maintain full support and a direct telephone contact for the complete duration of all off site visits or activities. The contact must have the authority to make significant decisions and be able to contact Headteacher/Chair of Governors if appropriate
- ✓ Establish a procedure whereby parents can be informed quickly about incident details by the school rather than through the media or pupils
- ✓ Ensure staff and other supervising adults understand the school and LEA emergency procedures
- ✓ Recognise that support must be provided by the LEA's Press Officer when dealing with the media
- ✓ Where more than one centre in an area of the visit is being used there is coordination and suitable communication systems between them
- ✓ Have a system to monitor off site visits and activity through checks of practices before, during and after the venture
- ✓ Have a review process for each visit/activity and on-going arrangements to inform future planning of similar ventures. Keep records of individual visits
- ✓ Have a system to record all accidents, incidents and near misses and report them to the Council or HSE where appropriate. All staff must be made aware of and comply with these procedures.

- ✓ Secure sufficient resources to meet the training needs of staff and governors
- ✓ Ensure that systems are in place to meet the financial regulations and that all staff understand and comply with them. Be aware of the need to obtain best value
- ✓ Ensure inclusion and equal opportunity policies work in practice

For each visit the Headteacher must ensure that all procedures are followed. Checklists and model forms are given in the section Organisation and Leadership of Visits. Checks include:

- ✓ The visit has appropriate written approval
- ✓ The visit has a sound educational objective, and the plans are suitable for the age, aptitude and experience of the particular pupils
- ✓ The Group Leader is approved
- ✓ There is a contingency plan (Plan B)
- ✓ Risk assessments have been completed, reviewed or updated and suitable risk management processes are in place
- ✓ Supervision ratios are appropriate for the particular visit or activity involving the named children. Children with special educational or medical needs may well require a higher supervision ratio
- ✓ All adults involved are competent to carry out their responsibilities
- ✓ The group leader, supporting staff and other volunteers understand their roles, responsibilities, the plans, emergency procedures
- ✓ Charging and financial procedures have been followed
- ✓ Any required insurance is in place
- ✓ Checks have been completed of locations and providers. Providers of licensable activities hold a valid AALA licence
- ✓ Full emergency and delayed return contact arrangements are provided by the school and that the Group Leader and nominated school contact has all names, addresses and contact details of the entire party
- ✓ Providers' emergency procedures link with those of the school and LEA
- ✓ First aid and general welfare provision is adequate
- ✓ Fully informed written parental consent has been obtained

- ✓ A parental information meeting has taken place where appropriate with a record of questions raised and responses given
- ✓ Carry out any other reasonable action or check to ensure the Health, Safety and Welfare of the pupils and adults involved
- ✓ The EVC keeps the Head informed of significant issues, and seeks appropriate advice where necessary.

SCHOOLS CODE OF PRACTICE FOR OFF-SITE VISITS AND ACTIVITIES

Roles & Responsibilities

Educational Visits Coordinator

Each school must appoint or nominate an Educational Visits Coordinator (EVC). The Headteacher may take this role or delegate it to another member of staff. If there is no EVC the duties pass by default to the Headteacher.

The competence required will vary according to the size of the school and type of visits and activities proposed. Evidence of competence should be through training and practical experience over a number of years.

The EVC may seek advice from other staff members with specific competence of different types of visit.

The EVC must:

- ✓ Have sufficient credibility to be able to influence colleagues
- ✓ Have experience in leading and managing a range of educational visits similar to those run at the school
- ✓ Be able to support colleagues formulate risk assessments and develop risk management processes

Generally the EVC will:

- ✓ Take on delegated responsibilities as formally agreed with the Headteacher in writing
- ✓ Be the main point of contact with the Councils Educational Visits Adviser
- ✓ Support the Headteacher with approvals and other decisions
- ✓ Notify planned and intended off site visits and activities to the Council on a biannual basis. Additional visits to be notified as planned
- ✓ Ensure competent staff lead or supervise visits or activities
- ✓ Assess the competence of staff to lead or supervise, as appropriate
- ✓ Assist with risk assessment and risk management processes
- ✓ Coordinate or assist in all training provision for off site visits and activities
- ✓ Keep the records of off site visits and activities

- ✓ Maintain their Continuous Professional Development to support their role.
- ✓ Disseminate appropriate information to staff
- ✓ Review and monitor systems, practice and individual visits or activities to facilitate reporting as required
- ✓ Inform the Council of anything they should be aware of
- ✓ Take the lead for any review of the school's policy for off sites visits and activities

SCHOOLS CODE OF PRACTICE FOR OFF-SITE VISITS AND ACTIVITIES

Roles & Responsibilities

Group Leader

- ✓ One teacher, the Group Leader, must have overall responsibility for the planning, management, supervision and conduct of an off site visit or activity. It is not acceptable to have a joint leadership situation.
- ✓ Every off site visit or activity must have a Group Leader.
- ✓ The Group Leader must be approved by the Headteacher and/or Governing Body according to the school policy.
- ✓ The Group Leader is **the key person** in the process of safe and successful delivery of off site visits and activities.
- ✓ School should offer CPD through a process of 'apprenticeship' style training for future Group Leaders.

Within this context the Group Leader must:

- ✓ Have the experience, training and qualifications to safely control the group on the planned visit or activities and lead the team of other accompanying teachers and adults
- ✓ Appoint a competent deputy in conjunction with the Headteacher and/or EVC if working with one or more other adults
- ✓ Use the Council Guidelines and School Policy to prepare for a visit or activity. The Section Organisation and Leadership of Visits offers model forms and checklists for the Group Leader.
- ✓ Carry out all the necessary planning and preparation before the visit including full risk assessments and risk management processes
- ✓ Ensure all activities are suited to the age, aptitude and experience of the particular pupils
- ✓ Maintain appropriate levels of supervision and supervision styles
- ✓ Be aware of child protection issues
- ✓ Define the roles and responsibilities of accompanying teachers and other adults
- ✓ Provide full written information to parents or carers and obtain their fully informed consent
- ✓ Prepare and brief pupils, their parents, accompanying teachers and other adults

- ✓ Ensure all adults are aware of any special needs or medical issues
- ✓ Manage the overall organisation during the visit, including staff leadership, supervision of pupils and have due regard for the Health, Safety and Welfare of everyone at all times
- ✓ Be able to facilitate continuous and **on-going risk assessment** for the duration of the visit or activity and be prepared to stop the visit or activity if appropriate
- ✓ **Be able to initiate Plan B or cease all activity** and return to school or base
- ✓ Maintain good practice in planned activities including those not directly leading or delivering. This would include opportunities for continuous review and improvement throughout the visit.
- ✓ Determine the level of first aid provision required and appoint an adult to take that responsibility
- ✓ Provide the Headteacher/EVC with all relevant documentation
- ✓ Carry all relevant documentation including emergency procedures
- ✓ Have an effective communication system with the designated member of staff from the school in the event of emergency or delay
- ✓ Report and record any accident, incident or near miss appropriately
- ✓ Carry out a review of the visit or activity with the Headteacher or EVC
- ✓ Observe the guidance set out for teachers and other adults
- ✓ Advise the Headteacher/EVC of any material change to a Formally Approved visit or activity

SCHOOLS CODE OF PRACTICE FOR OFF-SITE VISITS AND ACTIVITIES

Roles & Responsibilities

Teachers and other Adult Helpers

Teachers on school-led visits or activities act as employees of the Council (or the Governing Body), whether the visit or activity takes place within or outside normal hours, by the agreement with the Headteachers and Governors.

Teaching staff carry the prime responsibility for supervision and assisting the Group Leader in their responsibilities. Where more than one teacher is involved, another must be appointed as the Deputy Leader and be able to take full responsibility for the Group Leader's role if necessary.

Teaching assistants, non-teaching staff, governors, parents and volunteers can play an important role in providing appropriate supervision. The Group Leader must ensure that they are competent to undertake their responsibilities and brief them to ensure they understand their role and responsibilities. Parents and volunteers cannot normally be expected to take on the same level of responsibility as employed members of staff. In exceptional circumstances an adult other than a teacher may be the Group Leader or take another lead role if deemed suitably competent by the Headteacher.

All teachers, teaching assistants, non-teaching staff, governors, parents or volunteers will act 'in loco parentis' and carry a duty of care toward anyone they are supervising. Their duty of care will require them to do everything they reasonably can to ensure the safety and welfare of the pupils.

- ✓ If the main group separates into smaller operating groups, each group should be under the charge of a teacher or other adult who has been approved by the Headteacher as competent to fulfil this role.
- ✓ Non-teacher adults may be left in sole charge of pupils if it is the only reasonable way to deal with an unanticipated emergency situation
- ✓ All adults must follow the Group Leaders instructions at all times. They must bring the Group Leaders attention to any risk they feel is not acceptable.
- ✓ All adults must report immediately to the Headteacher if they feel their concerns are justified but are being ignored.
- × Staff should not be accompanied by their own children without the specific agreement of the Headteacher. Where staff are accompanied their children should normally be of the same age, aptitude and experience as the rest of the group.

SCHOOLS CODE OF PRACTICE FOR OFF-SITE VISITS AND ACTIVITIES

Roles & Responsibilities

Parents or Carers of children on a visit

Parents and carers must:

- ✓ Be fully informed about the visit or activity including rules and procedures
- ✓ Ensure their children understand the rules and procedures and will follow them
- ✓ Give written informed parental consent for their child to participate and acknowledge their own and their child's responsibility to support the disciplinary, health, safety and welfare arrangements for the visit or activity. This may be rolling consent for a predetermined period of time.
- ✓ Provide emergency contact details to the Headteacher and Group Leader
- ✓ Provide all relevant details regarding their child's emotional, psychological and physical health to the Headteacher and Group Leader
- ✓ Where necessary take responsibility for collecting their child if illness or unacceptable behaviour occurs during a visit or activity

Pupils

Pupils must:

- ✓ Behave sensibly and responsibly
- × Not take unnecessary risks
- ✓ Follow the instructions of the Group Leader and other supervising adults, including those at any venue
- ✓ Report anything that may harm anyone to the Group Leader or supervising adult
- ✓ Dress as requested
- ✓ Be sensitive to local codes and customs, especially abroad
- ✓ Understand that any behaviour that may put themselves or others at risk may result in being stopped from joining a visit or activity. In the event of this happening during a visit or activity arrangements may be made to return them to school or home. The curricular aims should be fulfilled in another way where possible.

APPROVAL PROCEDURES

Competence generally exists in schools and other departments to make sensible judgements and give Formal Approval for most types of visit or activity.

Formal Approval must be given for all types of visit or activity. Support is available from the Local Authority in the following respects.

- ✓ Adventure Activities led by employees require the leader (not the visit) to be approved through the Adventure Activities Leader Registration Scheme
- ✓ Where guidance or advice is required prior to formal approval being given, the Local Authority should be contacted as soon as possible.

All visits and activities that take children beyond the school premises require Formal Approval. All Formal Approval must be given in writing. Signing the Approval Form is sufficient.

The School's Visits Policy should detail who in the school may give Formal Approval for visits or activities. This delegated responsibility from the Council to the Governing Body can be further delegated to the Headteacher or EVC. There must be a clear and unequivocal statement in the Policy identifying who has the authority to give Formal Approval for specific types of visit or activity. Rolling approval may be appropriate for some programmes covering a set period

NOTIFICATION PROCEDURES

This process is key to the LEA's monitoring responsibility:

- ✓ Notification of Planned and intended Visits will be requested on a biannual basis. Subsequently, certain types of visit must be notified as planned at least two weeks prior to the visit.
- ✓ A single Notification may be appropriate for a rolling programme of similar activities managed by the same Visit Leader
- ✓ Notification to the Local Authority will be the responsibility of the Headteacher, who may delegate it to the EVC
- ✓ If exact dates for visits or rolling programmes are not fixed then approximate dates or periods can be given.

PARENTAL CONSENT

Parental Consent is required for all off-site visits and activities. Parents should be given as much detail as possible, to give consent on a fully informed basis.

Rolling Parental Consent for frequent activities may cover up to 1 School year. Parents may need to be notified before each visit.

MONITORING PROCEDURES

The Local Authority will practically monitor all visits.

A School based inspection will be arranged by contacting the Headteacher. The normal requirements for this inspection will be

- ✓ Evidence of Governing Body accepting Bradford Guidelines
- ✓ Evidence of Governors being informed of off-site visits and activities
- ✓ School Policy
- ✓ EVC appointment and EVC terms of reference/delegated responsibility
- ✓ Approval System
- ✓ Emergency/delayed return procedures
- ✓ Active self-monitoring process and Review system
- ✓ Accident, incident and near miss reporting/recording system
- ✓ Off-sites visits file. Reference Material
- ✓ Record of staff having read the guidelines
- ✓ Visits and activity records
- ✓ Record of Staff Competencies, where appropriate.
- ✓ Inspection of any Protective Equipment, where appropriate

A Visit based inspection will be arranged prior to the visit by contacting the Headteacher. It will decide whether risk management controls determined by planning and approval are put into practice on the visit. This will include

- ✓ Deployment of appropriate staff
- ✓ Staff awareness of the schools risk management controls
- ✓ On-going risk assessment issues

Approved Adventure Activity Leaders will be monitored

Spot Checks will be made on an occasional basis and will usually be visit based.

At the end of a monitoring visit verbal feedback will be given to the Head/EVC/Group Leader on initial findings. The School will receive a written report addressed to the Headteacher and Chair of Governors highlighting concerns and recommendations as well as recognising sound practice.

RISK ASSESSMENT EXEMPLAR

Activity:	Location:
Group:	Undertaken by..... Date.....

<p>HAZARD What could go wrong and to whom?</p>	<p>CONTROL What can be done about it?</p>	<p>SYSTEM How does your organisation make sure that the control is implemented?</p>

Page.....of.....

Reviewed by.....Date.....

- N.B.** When reviewing this Risk Assessment for a subsequent visit, consider
- a) whether there were any unanticipated hazards, and
 - b) whether the controls employed were effective.

RISK ASSESSMENT GUIDANCE NOTES FOR OUTDOOR ACTIVITIES

Risk is the likelihood of a person being harmed. Written 'risk assessments' show that an Activity Provider:

- i) recognises the significant hazards associated with a particular activity
- ii) is able to take measures (Controls) to ensure hazards are unlikely to cause harm

This is a legal requirement for all employers.

A simple risk assessment form is appended. Use the following notes as guidance.

Column (1) - Hazard - means anything that can cause harm.

Leaders should consider the particular activity, the associated environment, the equipment used, and the nature of participants and answer the question:

“What could go wrong?”

Briefly describe this in Column (1) **e.g. slips from top of cliff**. List first the hazards which are most likely to happen and have the most serious consequences. In truth accidents most often happen as a result of a combination of factors.

Also identify WHO would be harmed. This will be one or more of the following: The Leaders, Assistants, Participants, the whole group, or other members of the general public.

Generally in Outdoor Activities the most significant accidents are: Falling from a height; being hit by a falling or moving object; drowning and hypothermia. Hazards which do not follow this rule include: Pollutants (e.g. leptospirosis, radon gas); Medical Conditions (e.g. epilepsy, heart conditions); Hidden objects (e.g. underwater spikes); Lightning.

Column (2) - Control

Alongside each Hazard listed in Column (1) answer the question:

“What can be done specifically about each Hazard.

List your answer in Column (2) **e.g. Leader clips group into safety line at top of cliff**. In Outdoor Activities the Activity leader (or participant) is most likely to put the safeguard in place. Consequently a leader (or participants) with limited competence and poor judgement is likely to add significantly to the risk.

The list of controls in Column (2) will effectively be your operating procedures for a particular activity.

Column (3) - System

Alongside each Control list the policy or system which your organisation has in place to ensure the Control described is actually likely to be implemented in practice **e.g. Leader holds Single Pitch Rock Climbing Award**.

P.S. Many other formats can be used to complete a risk assessment. All are valid as long as the significant hazards and control measures are identified.

Risk Assessments need to be reviewed periodically or as a result of accidents or near misses.

EMERGENCY DETAILS / MEDICAL FORM / CONSENT

Please give information as fully as possible. The information is for instructors and group leaders and will be strictly confidential to them. Please return this form to the organiser.

PARTICIPANT DETAILS	
Participant.....	Date of birth.....
Address.....	Post Code.....
Tel. Contact: Day.....	Eve.....
EMERGENCY CONTACTS	
Parent / Carer or Next of Kin.....	
Address.....	Post Code.....
Tel. Contact Day.....	Eve.....

MEDICAL INFORMATION

Please give details of any disabilities / special needs

.....
.....

Recent injuries or illnesses e.g. back strain, flu:

.....
.....

Medical conditions and any medication e.g. asthma, epilepsy, diabetes, allergies (e.g. penicillin):

.....
.....

Name of G.P.....Address.....
.....Tel.No.....

Can you swim / tread water Yes [] No []

Please give any other information which you feel is relevant e.g. behavioural difficulties, emotional difficulties, dietary needs etc. on the back of this sheet.

PARENTAL CONSENT (for all participants under 18)

I give consent for my son / daughter to take part in the Visit. I have been given an outline programme and information relating to safety on the trip.

I consent to any emergency medical treatment should it be deemed necessary by a qualified medical practitioner.
(In the event of an emergency, every effort will be made to contact you).

I accept that, in the event of a participant's behaviour adversely affecting the safe and smooth running of activities, the Leaders will remove them from activities and contact parents / carers / guardian. In such cases, any payments made will not be refunded.

I declare that the information on this form is correct to the best of my knowledge and that if any changes occur before the visit, I will inform the organisers.

Signed.....(Participant / Parent) Date.....

Activity Providers and Tour Operators checklist

School.....Group leader.....

Date(s) of visit.....Name of Provider.....

The provider or tour operator providing services to the school named above is asked to give careful consideration to the statements below and sign in the space at the end of the form that the standard of service provided will meet the conditions listed. Please tick all specifications that you can meet and indicate by a cross any that you cannot meet. Write N/A against specifications that do not apply to your provision.

Section A should be completed for all visits. Section B (adventure activities) and Section C (tour operators) should also be completed if applicable.

SECTION A – ALL VISITS

Health, Safety and Emergency Policy

- 1. The provider complies with relevant health and safety regulations, including the 1974 Health and Safety at Work Act associated Regulations for visits taking place in the U.K., and has a written health and safety policy and recorded risk assessments which are available for inspection.
- 2. Accident and emergency procedures are maintained and records are available for inspection.

Vehicles

- 3. All vehicles are roadworthy and meet the requirements of relevant regulations in the country in which they are being used.

Staffing

- 4. All reasonable steps are taken to check staff who have access to young people for relevant criminal history and suitability for work with young people.
- 5. There are adequate and regular opportunities for liaison between school staff and the provider's staff and there is sufficient flexibility to make radical changes to the programme if necessary and the reasons for such changes will be made known to school staff.

Insurance

- 6. The provider has public liability for at least £5 million with a clause giving "Indemnity to principal".

Accommodation

- 7. U.K. accommodation is covered by a current fire certificate or advice which has been sought from a fire officer and implemented and a fire risk assessment has been completed.
- 8. If abroad, the accommodation complies with the fire and health and safety legislation that applies in that country.
- 9. There are appropriate security arrangements to prevent unauthorised persons entering the accommodation.
- 10. Separate male and female sleeping accommodation and washing facilities are provided and staff accommodation is close to pupil's accommodation.

SECTION B - ADVENTURE ACTIVITIES

- 11. Adventure Activities licensing Authority (AALA) Licence
- 12. AALA Reference No:.....

For AALA licensable activities in the UK, the specifications in this section are checked as part of an AALA inspection. However, providers registered with AALA are asked to consider these specifications with respect to any activities or aspects of their provision not covered by the licence.

Activity Management

- 13. The provider operates a policy for staff recruitment, training and assessment which ensures that all staff with a responsibility for participants are competent to undertake their duties.
- 14. The provider maintains a written code of practice for activities, which is consistent with relevant National Governing Body guidelines and/or, if abroad, the relevant regulations of the country concerned.

- 15. Staff competencies are confirmed by appropriate National Governing Body qualifications for the activities to be Undertaken, or staff have their competencies confirmed by an appropriately qualified and experienced technical Adviser.
- 16. Where there is no National Governing Body for an activity, operating procedures and staff training and assessment requirements are explained in the provider's code of practice.
- 17. Participants will at all times have access to a person with a current first aid qualification. Staff are practised and competent in accident and emergency procedures.
- 18. There is a clear definition of responsibilities between providers and visiting staff regarding supervision and welfare of participants.
- 19. All equipment used in activities is suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records of maintenance checks kept as necessary.

SECTION C – TOUR OPERATORS

When a tour operator delivers services to schools using other providers (e.g. ski schools, transport operators or accommodation), the tour operator must ensure that each provider meets the relevant specifications outlined in Sections A and B of this form and that these providers operate to standards that meet the relevant legislation applying in the country of operation.

- 20. Sections A and B of the form, as relevant, have been completed to show that suitable and sufficient checks of providers to be used have been made, records of which are available for inspection.
- 21. The Tour Operator complies with the Package Holidays and Package Tours Regulations 1992 and the Foreign Package Holidays (Tour Operators and Travel Agents) Order 2001, including bonding to safeguard customers' monies.
- 22. ATOL, ABTA or other bonding body name and numbers.....

If any of the above specifications cannot be met or are not applicable, please give details:

Details of any other accreditation with national governing bodies, tourist boards etc:

Signed.....Date.....

Name in Capitals..... Position in Organisation.....

Name and address of provider or tour operator:.....

Tel.....Fax.....e-mail.....

Website.....

Thank you for completing this form. Please return it to the teacher and school named overleaf.

Schools requiring advice on the interpretation of information given by providers or Tour Operators on this form should contact the Educational visits Adviser, Education Client Team, Future House, Bolling Road, Bradford BD4 7EB 01274 385585 e-mail jim.hughes@bradford.gov.uk