School VISITS Health and Safety TOOLKIT

Stockport Council Health and Safety

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9. Introduction

Off-site activities can supplement and enrich the curriculum of the school by providing experiences which would otherwise not be possible. All off-site activities must serve an educational purpose, enhancing and enriching pupil’s learning experiences.

A large number of school visits take place successfully each year. However, misunderstandings about health and safety law can sometimes discourage schools and teachers from organising these activities.

The Health and Safety Executive makes it clear that:

* the focus should be on how the real risks arising from such visits are managed and not on paperwork;
* there should be a proportionate and sensible approach for planning and organising off-site activities;
* those organising visits should simplify the planning process and authorisation arrangements for visits that involve everyday risks;
* the HSE's primary interest is real risks arising from serious breaches of the law. Any HSE accident investigation will be targeted at these issues.

Prosecutions taken by the HSE more often than not involve a fatality (or near fatality) where there has been a reckless or a clear failure to adopt sensible precautions. The fact that an accident occurs does not mean there has been a breach of health and safety law if the school can demonstrate that they took all reasonable precautions to manage the risks.

This toolkit has been designed to help school leaders to approve and organise educational visits in a sensible and proportionate way, by taking into account the serious and real risks that are associated with a visit off-site.

The toolkit covers how Stockport Council’s Health & Safety Team will be involved in supporting schools in the planning of Educational visits.

Visits have been categorised into 4 groups dependant on certain criteria that helps understand the level of risk and planning needed. These are detailed in the table below. It highlights the approval and notification process that schools will need to follow when planning a trip.

1. **CATEGORY OF VISITS**

|  |  |  |
| --- | --- | --- |
| **Category** | **Type of visit** | **Approval Process and Notification** |
| **1** | Curricular-related local visits or activities (usually on foot) which take place entirely within the school day. Examples include but not limited to - visits to a local park, wood, pond, swimming pool or high school. | Approval for the visit by the Head Teacher or Educational Visits Coordinator (EVC)  Notification to the LA not required. |
| **2** | Simple curricular or extra-curricular visits. NOT involving anything in Category 3 or 4 (may or may not use transport). Examples include but not limited to - Theatre visits, zoo visits, historical visits, sporting visits, interschool sports, after school clubs (away from base), cinema visits, | Approval for the visit by the Head Teacher or Educational Visits Coordinator.  Notification to the LA not required. |
| **3** | Visits entirely within the UK that involve any or all of the following: • Residential stays • Visits to remote locations  • Adventurous or outdoor activities Examples • Outdoor Centres, hotels, hostels, camping • Coastal visits, remote forests or moorland • Canoeing, rock climbing, biking, orienteering, skiing, etc. | Approval by Headteacher or EVC and Governing body.  Guidance may be required – Completion of the online form to notify the H&S team and we will contact you to discuss. The form must be sent at least 3 months in advance of the planned activity. |
| **4** | Visits outside the UK | Approval by Headteacher or EVC and Governing body.  Guidance will be required – Completion of online form will to notify the H&S team and we will contact you to discuss.  The form must be sent at least 5 months in advance of the planned activity. |

1. Planning Process

It is the responsibility of the school leaders and those organising the trip/visit to ensure that all health and safety risks associated with that trip or visit are assessed and appropriate management controls put in place. A clear and concise risk assessment should be carried out before notifying the Local Authority of the intention to take a trip.

It is also the responsibility of the school to ensure that all staff/volunteers undergo the correct training with regards to their health and safety responsibility.

**STEP 1 - Initial Approval from your Head of Establishment or EVC**

In the first instance staff planning visits must seek authorisation in principle from their Head of Establishment or EVC.  At this early stage, details may be limited but should include:

* Objective of the visit
* Proposed date of the trip
* Duration
* Venue
* Size of group
* Ages of the group
* Staffing profile
* Additional support needs
* Other resources required for the trip
* Estimate of costs

**STEP 2 - Detailed Planning and Risk Assessment: Visit Leader**

The visit leader, with other staff where appropriate, should carry out the detailed planning, including a daily itinerary of events and carry out a risk assessment for the visit.  The risk assessment should be recorded.  Information about the support requirements of people with additional needs is useful at this stage.

**STEP 3 Authorisation: Head of Establishment/EVC**

For Category 1 and 2 Visits:  Detailed plans along with the written risk assessment are given to the Head of Establishment or EVC, who authorises the visit once he/she is satisfied that all proper measures are in place.

For Category 3 Visits:  Detailed plans are submitted to the Head of Establishment 4 months prior to the visit.  The head teacher/EVC will submit to the Governing Body for authorisation.

When satisfied that proper measures are in place and the arrangements conform to the schools health and safety policy, the visit leader along with other staff should complete a detailed risk assessment.

For Category 4 Visits:  As for Category 3 but detailed plans will usually require to be submitted much earlier, at least 6 months prior to the trip.

**STEP 4 – Notify H & S Team**

For categories 3 and 4, the visit leader or EVC should complete the on-line form to notify the health and safety team of the intended trip. The health and safety team will contact the school’s EVC or visit leader to discuss and will require a copy of the detailed risk assessment for review.

Once the health and safety team have reviewed the risk assessment the visit leader or EVC will be informed.

**STEP 5 – Final planning**

Final checks and planning is carried out and the visit can go ahead. This may include obtaining information from parents and carers. Providing information back to parents and carers and/or carrying out an information evening.

At this stage all staff and pupils should be briefed about the trip.

Any final consent forms and payments should be collected.

1. Roles and Responsibilities

**Role of the Governing Body**

It is strongly recommended that governors read the DfE document,’ Health and Safety on educational visits, for local authorities, school leaders, school staff and governing bodies, November 2018. This document gives a clear outline of the scope and extent of their role in supporting the Headteacher and school staff in the safe management of off-site visits.   
  
To undertake its responsibilities for the health and safety of young people on off-site visits the Governing Body should:

* review and approve the school's policy on off-site visits which should detail the scope and range of visits conducted, and the internal procedures by which visits are proposed and approved;
* agree on the types of visit it should be informed about and the procedures for this to happen;
* help to ensure that early planning and preliminary visits can take place and that it is informed about less routine visits well in advance - some complex or costly visits require a lead-in time of up to 12 months.
* establish that each visit has a clear purpose and objectives appropriate for the age, needs and experience of the target group;
* ensure that the Headteacher and the EVC are supported in matters relating to off-site visits and that they have the time and expertise to meet their responsibilities;
* Ensure that a suitable and sufficient risk assessment is completed for each off-site visit.

**Role of the Headteacher**

Headteachers should:

* be aware of relevant regulations and guidelines including Health and Safety responsibilities,
* be clear about which types of visit require prior notification to, or approval of the local authority. The procedures must be efficient and completed within the designated time scale;
* ensure that the governing body is aware of the nature and purpose of off-site visits and has granted approval. For visits requiring specific prior approval by the Governing Body, ensure that full information is disclosed sufficiently in advance;
* ensure that the aims of the visit are commensurate with the needs and abilities of the young people. A visit must have a clearly defined off-site purpose that takes account of the age, needs and experience of the pupils.

**Role of the Educational Visits Coordinator (EVC)**

Each establishment should designate a member of staff as the Educational Visits Coordinator (EVC). This need not be a new post, but could be recognition of an existing expertise or key role for a senior manager.   
The EVC should advise in the planning and management of all off-site visits. The EVC should support visit leaders, the headteacher and governors in ensuring that all current guidance and good practice is followed.

The EVC should:

* have experience in leading and managing a range of off-site visits, in particular those which are common to the establishment, and be of sufficient status to be able to influence change in colleagues and school procedures. This may be the head teacher, but if not, must have the active support of the senior management team;
* liaise with relevant officers in the local authority to seek advice and guidance;
* support the headteacher and governors in their decision-making;
* be able to confirm that the leadership of the visit is appropriate and to check staff qualifications: this to include accompanying staff and volunteers;
* help organise the induction and training of staff and volunteers new to the venture;
* make sure that Disclosure and Barring Service (DBS) disclosures are in place as necessary;
* work with visit leaders to ensure that the aims of the off-site visit are achievable and in line with those of the establishment;
* confirm that consideration has been given to the group of pupils concerned and the location of the visit and check Visit Leader's group/site risk assessments;
* ensure that the school has emergency procedures in place and knows how to liaise with the LA should an emergency occur;
* keep records of individual visits including reports of accidents and ‘near misses’;
* learn from previous experience, recording successful practice and contacts, and be able to use them and move on, in particular where staff personnel change;
* Ensure the correct insurance is arranged.

**Role of the Visit Leader**

If the visit leader is not a teacher, they must complete suitable training. It is strongly recommended that teachers leading on group 3 or 4 category visits also attend training.

Visit leaders are responsible for the safe planning, supervision and conduct of the visit and should:

* recognise that whilst leading the visit s/he is in effect representing the headteacher;
* follow schools guidelines/policies;
* appoint a deputy leader who can take over at any time;
* ensure a comprehensive risk assessment and management plan is carried out and submit it to the headteacher / EVC for approval in a timely manner;
* clearly define the roles and responsibilities of all adult helpers;
* be aware of safeguarding issues;
* ensure the ratio of adults to young people is appropriate for the needs of the group and the activity;
* ensure that informed parental consent has been obtained as necessary
* ensure all necessary documents for group 3 and 4 visits are submitted to the local authority within the required timescales
* ensure adequate first aid provision is available and accessible;
* ensure all adults have information of any special or medical needs amongst young people;
* establish emergency procedures for all elements of the visit;
* ensure all adults have details of the home contact and of emergency procedures;
* Always have regard for the health and safety of the group.
* consider stopping the visit or activity if the risk to the health and safety of party members becomes unacceptable and have in place procedures for such an eventuality.

**Role of the Health and Safety Team**

The team’s role is to offer health and safety support and guidance for those trips that fall into Category 3 and 4. Approval for all trips lies with the Headteacher and Governing Body.

The health and safety team will:

* review the risk assessment to ensure all hazards have been considered and appropriate control measures are included;
* provide additional health and safety advice and guidance as required and liaise with the visit leaders
* provide a standard simple risk assessment template;
* maintain a sharepoint site of planned trips and visits;
* advise the schools on areas of good practice and any new legislation or Codes of Practice.
* Provide an e-learning package for EVCs and visit leaders.

1. Risk Assessment

Risk Assessment (RA) is an essential element of every off-site visit and journey and should involve a careful examination of an activity in order to identify what could cause harm to the people involved, an estimate of the likelihood of the harm occurring, and checking to ensure whether or not sufficient precautions are being taken to prevent it.

It is the visit leader’s responsibility to ensure the completion of the RA. However, it should be viewed as a process that all members of a visit should be involved in, including wherever possible young people. All significant hazards should form part of a written RA for all visits and the importance of this cannot be over-stated.

A standard risk assessment template is provided at appendix 1.

It is not necessary for visit leaders to undertake the risk assessment for activities run by external providers; however, it is essential to seek assurances that providers have undertaken a risk assessment and, if possible, obtain a copy.

Further guidance on completing a risk assessment can be found on the Health and Safety Executive’s website.

1. Local Authority Notification Process

The visit leader should complete the online form. Once this is submitted it will automatically notify the Health and Safety Team of your intention to organise a trip.

The on-line form need only be completed for visits/trips that fall into categories 3 and 4.

Once the form is submitted to the health and safety team will make contact with the EVC or visit leader to discuss.

[LINK TO ONLINE FORM](https://forms.office.com/Pages/ResponsePage.aspx?id=nvZeoElhuk-kDN8ziBD2RHYAkOPpBWdNgS3hFZ8UE2VUNFg2ODBMSzVVVFJNSkxFWU45SVdEWUZJSS4u)

**Cancellations**

Should your trip or visit be cancelled for any reason you should notify the health and safety team using the on-line form. You should also contact your insurance provider to inform them.

1. further guidance

[DFE Health and Safety Advice on educational trips](https://www.gov.uk/government/publications/health-and-safety-on-educational-visits)

[Health and Safety on educational visits – GOV.UK](https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits)

[Health and Safety Executive – School Trips](https://www.hse.gov.uk/services/education/school-trips.pdf)

[OEAP National Guidance](https://oeapng.info/)

[Terrorism](http://www.npcc.police.uk/staysafe)

[Calling Mountain Rescue](https://www.mountain.rescue.org.uk/how-to-call-out-mr/)

1. contacts

If you require advice or guidance on things such as insurance, safeguarding or special educational needs you should contact the appropriate team.

[Stockport Council Health and Safety Team email](mailto:HRSafety&HealthTeam@stockport.gov.uk) healthandsafety@stockport.gov.uk

[Stockport Council Insurance Team email](mailto:insurance@stockport.gov.uk)

[Stockport Council’s Travel Co-Ordination team](mailto:travelcoordination@stockport.gov.uk) – 0161 249 4450

[Stockport Council’s Legal Team](mailto:legal@stockport.gov.uk)

[Safeguarding](mailto:Safeguarding_in_Schools@stockport.gov.uk)