

Urgent Educational Visits Ebriefing and Update 01.10.2014

1. There is a new BCC “Policy and Guidance for Educational Visits and Learning Outside the Classroom” which supersedes previous guidance. The Policy document adopts the Outdoor Education Advisers Panel’s National Guidance from 1st October 2014.
2. The document can be found on E briefing, Schools HR, Schools Safety Services Website
3. All Head Teachers and Educational Visit Co-ordinators (EVC) must ensure they are aware of the contents
4. **Notifications** should now be sent to address:
schoolsafety@birmingham.gov.uk
Safety Services (WS)
P.O. Box 15630
Birmingham
B2 2QF
Tel. 0121 464 8564

EVC and EVL Courses are also available through the above contact information

Educational Visits Adviser: Tom Lilley 07980 266367

Policy and Guidance for Educational Visits and Learning Outside the Classroom

Birmingham City Council

**Incorporating the “National Guidance” from
the Outdoor Education Advisers Panel**

2014

Published by Birmingham City Council
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Foreword

I welcome this new 'Policy and Guidance for Educational Visits and Learning Outside the Classroom' for all including teachers, youth workers and other educational professionals working with young people in Birmingham.

This Policy and Guidance is important to the health, safety and well being of our young people. It offers unique opportunities to enrich learning, enhance their personal and social development, gain greater awareness of different environments and adopt healthy lifestyles.

The Council has taken over responsibility for public health and this Policy and Guidance supports the long term preventative strategy which is designed to improve the life chances and aspirations of our young people.

This Policy and Guidance has been created by the hard work of committed and experienced practitioners from across the Council. I hope that you will all find it indispensable in enhancing your work for the benefit of the young people of Birmingham.

Outdoor educational visits give children fantastic learning opportunities, whilst creating memories that last a lifetime.

Councillor Brigid Jones

Cabinet Member Children and Family Services

Introduction

'To reach their potential, children and young people need experiences which broaden their horizons, enrich their cultural experience and understanding and improve their wellbeing.' (Children Young People and Families 2012-2015 Directorate Plan)

This new policy and guidance will help simplify the systems in place for supporting 'Educational Visits' and 'Learning Outside the Classroom' in Birmingham. This will be a valuable resource for schools and other settings working with children and young people. This supersedes the 2006 policy document 'Learning Beyond the Classroom'. Underpinning this policy is a comprehensive web based resource which is searchable by topic, role or contents. This national resource will be continually edited and upgraded thus eliminating the need for printing and bulky documentation.

It is essential that qualified competent staff can lead and undertake these activities and experiences safely carefully weighing up the benefits against the risks. Training is provided for the Council through the Birmingham Education Partnership and this supports positive outcomes as well as giving professionals the confidence to take part in these activities with their young people. Appropriate courses can be found in this policy and guidance document.

DOCUMENT STATUS:	Birmingham City Council (BCC) Policy and Guidance
EFFECTIVE FROM:	October 2014
NEXT REVIEW:	Annually: September 2015
RELATED DOCUMENTS:	Outdoor Education Advisers Panel National Guidance for the Management of Outdoor Learning Off-site Visits and Learning Outside the Classroom Activities (Introduced 2011) [Reviewed and updated on regular basis]
	DfE Guidance 2013 Advice on Legal Duties and Powers for Local Authorities, Head Teachers, Staff and Governing Bodies
	Health and Safety Executive 2011 School trips and outdoor learning activities: Tackling the health and safety myths.
	BCC Guidance - Critical Incidents Management; Guidance for Schools March 2014
SUPERSEDED DOCUMENTS:	DfE Guidance 1998 – Health and Safety of Pupils on Educational Visits (HASPEV) and Part 1, 2, & 3 supplements
	BCC Learning Beyond the Classroom 2006 Policy and Guidance for Educational Visits;
	DfE Guidance 2001 – Health and Safety: Responsibility and Powers
AUDIENCE:	Head Teachers, Principals and Managers of Schools; all other educational settings; other private, voluntary or independent establishments and those that are commissioned by BCC
	Educational Visit Co-ordinators (EVCs)
	Visit Leaders / Assistant Leaders
	Governing bodies
	Local Authority Officers – Birmingham City Council: <ul style="list-style-type: none"> • Directorate for People • All other directorates with educational settings • Safety Services • School and Governor Services • Legal and Insurance Sections • Emergency Planning and Critical Incident Support

Policy and Guidance for Educational Visits and Learning Outside the Classroom

1. Provision of Employer Guidance

Birmingham City Council (“the Council”) has formally adopted “**Outdoor Education Advisers Panel National Guidance for the Management of Outdoor Learning, Off-site Visits and Learning Outside the Classroom**”. This guidance can be found on the following web site:

www.oeapng.info

This does not preclude schools implementing alternative arrangements based on local circumstances and outcome of risk benefit analysis.

Anybody involved in educational visits and learning outside the classroom is strongly advised to read this policy before seeking information from the oeapng website.

It is a legal expectation that employees **must** work within the requirements of their employer’s policy and guidance. Birmingham City Council employees must follow the requirements of ‘Outdoor Education Advisers Panel National Guidance’, as well as the requirements of this document.

Another employer such as the governing body of a voluntary aided school or academy Trust may wish to opt into the Council policy and guidance including systems and processes for supporting and monitoring educational visits and learning outside the classroom activities. **They should produce a policy statement that makes this clear.**

Where a Council employee commissions an educational visit or learning outside the classroom activity, they must ensure that the provider has either:

1. adopted the Council Policy and Guidance and the OEAP National Guidance

Or

2. have systems and procedures in place where the standards are as robust as those required by the OEAP National Guidance.

2. Scope and Remit

The OEAP National Guidance document: 1c “**Status and Remit and Rationale**” clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of children and young people undertaking experiences beyond the boundary of their normal classroom or environment;
- direct supervision of children and young people undertaking experiences that fall within the remit of learning outside the classroom;

- facilitating experiences for children and young people undertaking experiences beyond the boundary of their normal classroom or environment;
- deploying staff who will supervise or facilitate experiences for children and young people undertaking experiences beyond the boundary of their normal environment;
- this guidance may be applicable for all those supervising vulnerable adults as there is a transfer of good practice for the wider use of educational visits;

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP National Guidance document: 3.2a ***“Underpinning Legal Framework and Duty of Care”***

3. Ensuring Understanding of Basic Requirements

As an employer, the Council is required to ensure that its employees are provided with [This also applies to other employers who opt into this policy and guidance]:

- access to appropriate guidance relating to educational visits and learning outside the classroom activity;
- access to appropriate training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed accredited advisers who have proven expertise and professional understanding of the guidance.

The relevant training courses are:

1. Educational Visit Coordinator (EVC) Training - all Birmingham schools; academies; other educational establishments; and other private, voluntary or independent establishments; i.e. those working in partnership with BCC are required to have a current trained EVC in post. If an establishment does not delegate the responsibility for educational visits and learning outside the classroom to a nominated trained EVC, then that role will rest with the Head Teacher / Principal / or Manager of the establishment by default. The Head Teacher/ Principal / Manager should therefore undertake EVC training.
2. Educational Visit Coordinator (EVC) Revalidation - all Birmingham schools; academies; other educational establishments; and other private, voluntary or independent establishments; i.e. those working in partnership with BCC are required to ensure that their EVC undertakes a revalidation every three years.
3. Visit Leader Training – this course is ***strongly recommended*** for all those who lead learning outside the classroom activities in Birmingham from October 2014. To meet OEAP National Guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice, so update refresher training is also strongly recommended. Schools and other educational establishments may find training for visit leaders can more successfully be delivered to whole staff on training days. This training may be accommodated on request.

Information on how to access the relevant courses e.g. EVC and Visit Leader Training courses are available on the Safety Services web site or call number below

Telephone 0121 464 8564 Email; schoolsafety@birmingham.gov.uk

For the purposes of day-to-day updating of information, Birmingham EVCs and Visit / Activity Leaders are directed to the posting of “EVC Briefing Updates” also available on the above web site.

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their establishment’s Educational Visits Coordinator (EVC), or the nominated Educational Visits/Outdoor Education Adviser.

4. Approval and Notification of Activities and Visits

The EVC/Head Teacher/Manager is responsible for approving each visit. Where school’s / establishment’s policies delegate these responsibilities and functions to others, this must be clear. This is important for the formal notification and approval processes.

Approval in principle should be sought from the EVC/Head Teacher/ Manager as soon as possible before any financial commitment is made. Schools / Establishment policies will differ; organisers should check procedures and give adequate notice.

Birmingham uses a system of notification for all visits involving adventurous activities; all visits to ‘wild country’ and Duke of Edinburgh Award expeditions (refer to section 16). These visits **must** be notified to the Council using the form OE2005. Visits abroad must be notified to the Council (Overseas Visits Form OSV 2005). These are overseas and adventurous activities delivered by an external provider or by staff within the establishment. Non adventurous activities do not require notification e.g. visits to any museum, local parks, the theatre, theme parks such as Alton Towers. – Please contact the Education Visits Adviser if you are not sure.

Visits requiring notification to the Council should be submitted at least 4 weeks prior to the day of the visit wherever possible. However, in the case of complex visits such as expeditions abroad support should be sought.

Note: The Youth Service has a separate notification approval process.

Forms for Adventurous Activities and Overseas Visits should submitted to

Email; schoolsafety@birmingham.gov.uk

Safety Services (WS)

P.O. Box 15630

Birmingham

B2 2QF

Tel. 0121 464 8564

5. Risk Management

The employer has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level. This requires that suitable and sufficient risk management systems are in place, requiring the employer to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. The Council strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. HSE endorse this approach through their **“Principles of Sensible Risk Management”** and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is a requirement for the risk assessment process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to individuals. EVC Training ensures that establishments are supplied with electronic generic risk-benefit assessments for educational visits and learning outside the classroom. Further exemplar event-specific assessments, risk management materials and advice are available by contacting the Educational Visits Adviser.

It is strongly recommended that establishments adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of learning outside the classroom learning opportunities.

Refer to OEAP National Guidance document: 4.3c **“Risk Management”**

6. Emergency Planning and Critical Incident Support

A critical incident is an incident where any member of a group undertaking an educational visit or learning outside the classroom activity has either:

- suffered a life threatening injury or fatality;
- is at serious risk;
- or has gone missing for a significant and unacceptable period.

Schools must have emergency planning procedures in place in the event of a critical incident. Every visit leader and assistant leader must be familiar with emergency planning procedures and reporting mechanism. This forms part of the training delivered to EVCs and visit leaders.

Relevant emergency contact telephone numbers should be carried by leaders at all times during an offsite educational visit but should only be used in the case of a genuine emergency. Under no circumstances should these telephone numbers be given to young people or to their parents or carers.

To activate support from the Council, please refer to section 19, page 17.

Refer to OEAP National Guidance documents: 4.1a “**Off Site Visit Emergencies: The Employer’s Role**” 4.1b “**Off Site Visit Emergencies: The Establishment’s Role**”; 4.1i “**Emergencies and Critical Incidents – An overview**”

7. Monitoring and Quality Assurance

Schools and other education settings should ensure that there is sample monitoring of educational visits and learning outside the classroom activities undertaken. Such monitoring should be in keeping with the recommendations of OEAP National Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the EVC.

Refer to OEAP National Guidance document: 3.2b “**Monitoring**”

8. Assessment of Leader Competence and Good Practice Requirements

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the Council Policy and Guidance that all leaders and their assistants have been formally assessed as competent to undertake the responsibilities of leading the educational visit or learning outside the classroom activity.

Refer to OEAP National Guidance document: 3.2d/4.4a “**Assessment of Competence**”

To be deemed competent, a Visit / Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognised good practice for that role.*

All staff and helpers must be competent to carry out their defined roles and responsibilities.

OEAP National Guidance sets a clear standard to which leaders **must** work.

Staff participating in educational visits and learning outside the classroom activities must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff.

Where a Volunteer helper is a parent (or otherwise in a close relationship to a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader’s plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment.

Refer to OEAP National Guidance document: 4.3a “**Good Practice Basics**”

9. Charges for Educational Visits and Off-site Activities

Refer to OEAP National Guidance document: 3.2c “**Charges for Off-site Activities and Visits in an Educational Establishment**”

10. Vetting, DBS Checks and CRB Changes

The Disclosure and Barring Service (DBS) was established under the Protection of Freedoms Act 2012. The primary role of the DBS is to help employers make safer recruitment decisions and prevent unsuitable people from working with vulnerable groups including children and young people.

However, it must be clearly understood that a DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of children, young people or vulnerable adults.

Careful consideration should be given to whether a voluntary helper may require a DBS Enhanced Disclosure. In general terms, those helpers with *frequent* or *intensive* contact e.g. working with a group or groups regularly or involved in accompanying a residential should be checked.

It is **essential** that the full contents of the document below are taken into account.

Refer to OEAP National Guidance document: 3.2g “***Vetting Disclosure and Barring Service (DBS) Checks***”

11. Requirement to Ensure Effective Supervision

In general terms, the law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is effective when on educational visits and learning outside the classroom activities.

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

Refer to OEAP National Guidance document: 4.3b “***Ratios and Effective Supervision***”

Refer to OEAP National Guidance document: 4.2d “***Group management and Supervision***”

12. Preliminary Visits and Provider Assurances

All educational visits and learning outside the classroom activities should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group needs and expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

- The Learning Outside the Classroom Quality Badge
- AALS licensing
- Adventuremark
- Association of Heads of Outdoor Education Centres Gold Badge
- National Governing Body centre approval schemes (applicable where the provision is a single, specialist activity).

Where a provider holds one of the above accreditations, there should be no need to seek further assurances regarding risk assessments of the provider. Schools and Children's Services establishments should ensure that leaders complete a risk benefit assessment and record any significant findings for any aspects of a visit that they are leading or responsible. This will usually include transport to and from the venue plus any stops or visits on route.

Refer to: OEAP National Guidance document 4.4h ***“Using External Providers and Facilities”***

13. Adventure Activities Licensing Regulations

Employers, Heads/Managers, EVCs and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA). The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

Leaders should be aware that the AALS licence is an assurance of safety. It does not accredit educational or activity quality.

Refer to OEAP National Guidance document: 3.2f ***“Adventure Activity Licensing Regulations”***

14. Insurance for Educational Visits and Off-Site Activities.

Non-delegable duty of care

In October 2013 the UK Supreme Court ruled that, in particular circumstances, schools and other public bodies have a non-delegable duty of care. This is an exception to the normal fault based principles of law. It means that, in these particular circumstances, schools and other organisations are liable to be sued for the negligence of a third party.

For example, a school contracts with a third party provider to deliver swimming lessons within school time. If, through the negligence of this third party, a child is injured, the child can sue the school and local authority for compensation. The fact that the school was not responsible for the actions of the third-party is irrelevant as; in this case, the school's duty of care is non-delegable.

It is therefore important to ensure that any contracts entered into with third parties include terms to carry insurance including indemnity in the event of negligence as local authorities and schools will need to pursue independent third parties for an indemnity or contribution should any such claims succeed.

Employer's Liability Insurance

Employer's Liability Insurance is a statutory requirement. The Council holds a policy that indemnifies it against its legal liability in respect of all claims for compensation resulting in bodily injury suffered by any Council employee and employees in schools maintained by the Council. As this type of policy is a statutory requirement any other employer should hold a similar policy in respect of its employees. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors.

Schools which achieve Academy status will be obliged to make their own insurance arrangements outside of the Council's portfolio of covers.

Public Liability Insurance

The Council also holds Public Liability Insurance, indemnifying it against its legal liability in respect of claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property. Employees (as agents of the employer) are indemnified under the policy, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities such as educational visits and off-site activities including school sports, together with approved extracurricular activities organised by all establishments and settings for which the employer is responsible.

Employees

The Council operates an Employees Personal Accident Scheme. Cover under this section is provided for all Council employees and employees in schools maintained by the Council, in the course of their employment, providing predetermined benefits in the event of an accident. The scheme's benefits are designed to provide compensation for injury where the employer is not deemed negligent. The Personal Accident Scheme provides cover for all full and part-time employees. Details of the scheme may be obtained from the appropriate staffing section within Human Resources.

Insurance for Pupils

The Council only covers accidents to pupils when due to its negligence and these claims are covered within its Public Liability Insurance detailed above. Personal Accident Insurance for pupils is not arranged by the Council but may be arranged by the school direct; however there is no statutory requirement for governors to arrange this cover. The cost of Personal Accident Insurance arranged by the school may be recharged to parents. Parents should be reminded that the Council does not insure children's belongings.

For journeys/visits overseas, Governing Bodies **must** insist that Foreign Travel Insurance is arranged that covers **all persons on the visit**. This is especially important, due to the high costs of medical care abroad and possible repatriation expenses in the event of an accident or illness.

For all journeys within the United Kingdom Governing Bodies should decide whether or not they require insurance to be arranged, having regard to the nature of the journey and the capabilities of the pupils involved. In all cases, reference should be made to the Council's guidelines governing educational visits, before final decisions are made.

Schools should notify insurers if the activity involves any form of winter-dangerous sports as the insurers may need to charge an additional premium.

If additional insurance is not taken out, it is recommended that parents are advised of this and a suggested wording for parental consent forms is detailed below:

"The school is insured against its legal liability to pay compensation should it be held responsible for causing an injury to your child whilst in our care.

The school has not taken out any additional insurance in respect of this visit e.g. personal accident, and, should you be concerned about this area of risk, you are advised to make your own personal arrangements".

It must be remembered that the Council's public liability arrangements apply for all school organised activities, including visits within the UK and abroad (unless schools choose to purchase insurance from an alternative provider).

Visit and activity leaders should contact the Council's Insurance Section to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer.

They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Schools should notify insurers if the activity involves any form of winter-dangerous sports as the insurers may need to charge an additional premium

The number for the Insurance section is 0121 303 4829 or 0121 303 3288

Reference can also be made to the Schools Financial Procedures Manual

Refer to OEAP National Guidance document: 4.4c ***“Insurance”***

15. Inclusion

Every effort should be made to ensure that educational visits and learning outside the classroom activities are available and accessible to all, irrespective of special educational or medical needs, disability, ethnic origin, gender, sexuality or religion. If a visit needs to cater for children and young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Establishments should take all *reasonably practicable* measures to include all children and young people, unless risk assessment determines otherwise. In accordance with the Equality Act 2010 the principles of inclusion should be promoted and addressed for all visits and reflected in the establishment’s policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Refer to OEAP National Guidance document: 3.2c ***“Inclusion”***

16. Duke of Edinburgh Award

The Duke of Edinburgh Award (DofE) is available through schools, local youth clubs and voluntary organisations around the City.

All schools wishing to deliver the DofE must be a Directly Licenced Centre with the DofE and responsibility lies with them for in accordance with their licence with the DofE.

Where DofE expedition activities are involved all appropriate external and internal notifications and approvals should be gained. A DofE Expedition is notifiable as an adventurous activity.

Advice can be sought from the Outdoor Education and Educational Visits Adviser.

The Regional D of E office can offer help and advice.

There are separate Council guidelines for D of E which can be found on the Birmingham Education Partnership website.

You can also refer to the OEAP National Guidance Document: 7b ***“Duke of Edinburgh’s Award Expeditions”***

17. Transport

Careful thought must be given to planning transport to support educational visits and learning outside the classroom (off-site) activities. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it. All national and local regulatory requirements **must** be followed.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

Refer to OEAP National Guidance document: 4.5a “**Transport: General Considerations**”

Refer to OEAP National Guidance document: 4.5b “**Transport in Minibuses**”

Refer to OEAP National Guidance document: 4.5c “**Transport in Private Cars**”

18. Planning and Consent

Planning should reflect your establishments’ procedures, employers’ requirements, legal requirements and good practice requirements. It is critical part of the Risk Benefit assessment and management process that this document is referred to:

Refer to OEAP National Guidance document: 5.2b “**Planning Basics for Outdoor learning, Offsite Visits and Learning Outside the Classroom**”

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as ‘**SAGED**’ and include:

- **S**taffing requirements – trained? experienced? competent? ratios?
- **A**ctivity characteristics – specialist? insurance issues? licensable?
- **G**roup characteristics – age? prior experience? ability? behaviour? special and medical needs?
- **E**nvironmental conditions – like last time? impact of weather? water levels?
- **D**istance from support mechanisms in place at the home base – transport? residential?

To reduce bureaucracy and encourage activity, establishments need to take account of the legalities regarding a requirement for formal consent. When an activity is part of the establishment’s curriculum or normal working practices and no parental contributions are requested, there may not be a need for specific parental consent. However, in the interests of good relations between the establishment and the home, it is good practice to ensure that those in a position of parental authority are fully informed. Consent forms are often used to update parent’s/carer’s current phone numbers, contact details plus any medical conditions which have developed since the last check.

It is good practice to obtain blanket parental consent for a range of regularly occurring activities or a specific programme.

It is also good practice to develop *activity*-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to “*operational guidance*” that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The subject of obtaining consent is a matter for individual school / establishment discretion provided they comply with law.

Refer to OEAP National Guidance document: 4.3d “**Consent**”

19. IN THE EVENT OF A CRITICAL INCIDENT (during school hours)

First point of contact:

Joyce Rawlinson, School Support Manager, Central
Tel: 0121 303 2193 Mobile: 07775 407332

Vacant, School Support Manager, North
Tel: 0121 464 3174 Mobile: Not currently available

David Bridgman, School Support Manager, South
Tel: 0121 303 8394 Mobile: 07771 339061

If not available, contact:

Amanda Daniels, Head of Educational Psychology
Tel: 0121 303 1792 or 0121 464 1364 Mobile: 07546 980883

For all critical incidents outside of normal school hours please phone the Press Office out of hours number:0121 303 3287. The Press Officer on duty at the time will contact relevant People Directorate personnel.

This applies to all schools and establishments within the Directorate for People. Other educational establishments (including academies) must have their own critical incident plan.

Further information from the Council can be found in 'BCC Guidance - Critical Incidents Management; Guidance for Schools March 2014'

20. Other Important Contact Numbers

schoolsafety@birmingham.gov.uk

Safety Services (WS)
P.O. Box 15630
Birmingham
B2 2QF

Tel. 0121 464 8564

Educational Visits Adviser: Tom Lilley 07980266367

Other Supporting Documents

APPROVAL CHECKLIST 3 OVERSEAS VISITS

(FOR ESTABLISHMENT USE ONLY)

Where visits abroad are planned and following the satisfactory completion of Checklist 1 (and Checklist 2 where appropriate), organisers should satisfy themselves of the following issues before any financial commitment is made.

- Yes 1. Has Checklist 1 (and Checklist 2, where appropriate) been satisfactorily completed?
- Yes 2. Do staffing levels and experience conform to the guidelines in Section 2
- Yes 3. Have adequate checks been made on accommodation security and safety? (Section 10; paragraphs 20 - 23)
- Yes 4. On exchange visits:
i. has the child protection guidance been followed? (Section 10; paragraphs 26 - 30)
ii. are satisfactory child protection measures in place?
- Yes 5. Is all documentation in place (personal, medical, passports, insurance)? (Section 10; paragraphs 11 - 14)
- Yes 6. Have arrangements been made for dealing with emergencies? (Section 10; paragraphs 38 - 39)
- Yes 7. Where a travel operator is used, does it offer appropriate financial security? (Section 10; paragraphs 7 - 9)
- Yes 8. Have parents been fully informed of, and given their consent to, all the visit arrangements?

Signed _____ (Visit Leader) Date _____

If answers to all relevant questions above are affirmative, then establishment approval of the visits could reasonably be assumed.

Signed _____ (Head/EVC) Date _____

8.9 APPROVAL CHECKLIST 2 ADVENTURE ACTIVITIES FOR ESTABLISHMENT USE ONLY

In addition to Checklist 1 the following questions should be completed where any of the adventure activities listed in this section are undertaken during the visit. It should also be used when any such activities take place on the establishment site since risk may be inherent in the activity, irrespective of where it takes place.

PART 1: FOR ALL DEFINED ADVENTURE ACTIVITIES

Questions 1 - 13 should be answered when any adventure activity is planned, whether delivered by school staff, a centre or a licensed provider.

VISIT TO: DATES:

- Yes 1. Have you ensured/received written confirmation that staff/instructor activity qualifications match, as a minimum, those in Section 8 Activity Qualifications.
- Yes 2. Do instructional staff have experience within the past 5 years of the geographical area/s to be used?
- Yes 3. Do Leader ratios conform to the LA guidelines for each activity offered? (Section 8)
- Yes 4. Are the time of year and anticipated conditions appropriate to the activity?
- Yes 5. Is the prior experience of participants adequate for the level of the activity offered?
- Yes 6. Are the activity guidelines commensurate with those of the LA? (Section 8)
- Yes 7. Do group sizes reflect LA guidelines? (Section 8)
- Yes 8. Do instructors have appropriate first aid qualifications and equipment?
- Yes 9. Do participants have clothing and equipment suitable for the proposed activity? (Section 8; paragraphs 14 – 16)
- Yes 10. Have arrangements been made to deal with emergencies whilst the activity is in progress?
- Yes 11. Where a commercial or non-LA provider is used to deliver activity, has the Independent Provider Questionnaire (Section 9.3) been satisfactorily completed?

Yes 12.

Has a risk assessment been carried out and recorded?
(Section 6)

Yes 13.

Has the LA been notified using Form OE2005 (following)

FORM OE 2005

Section 8

NOTIFICATION OF ADVENTURE ACTIVITIES

This form should be photocopied or submitted electronically and used for notification of the activities listed in Section 8 (Page 1).

USING THIS FORM

All Establishments should:

- Complete Parts 1 & 2 and send to the address overleaf
- Ensure each part is signed by the appropriate person
- Enclose wild country/ D of E routes where applicable
- Complete a checklist for Adventure Activities (Section 8) and retain this on record at your establishment. You do not need to send this checklist to the Local Authority

PART 1 TO BE COMPLETED BY ALL SCHOOLS, CENTRES OR OTHER ESTABLISHMENTS

Name of School/Establishment _____

Tel. _____

Address _____

Date of visit from _____ to _____ Name of Visit Leader _____

Email _____

Total Young People

_____ Male _____ Female _____ Age range _____

Adventure activities (please list) _____

Geographical location, place/address and area, please be specific.

PART 2

Names of all accompanying adults
(please indicate whether male/female (m/f);
staff (s); parent (p); governor (g); volunteer (v)

Relevant qualifications/experience

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

If the activities are wholly or partly provided by a commercial company or independent organisation, please state:

Name of Company/Organisation _____ Tel _____

Company Address _____

Address of Where staying/Activity Base _____

Please state the activities, which will be under the direct control of:

- i) LA employees _____
- ii) Hired instructors _____

**For teacher/ youth worker-led expeditions into 'wild country',
Please enclose routes marked on a photocopied map scaled 1:50,000 or 1:25,000**

Have you completed Adventure Activity Checklist and kept on record at your establishment? Yes / No

Emergency Contact Names 1) _____ Tel: _____
2) _____ Tel: _____

(Representatives of School, Unit or Centre who can be contacted by Leader or LA in an emergency)

I confirm that appropriate insurance has been effected and that adequate emergency procedures are in place

Signed _____ (EVC/ Head Teacher/Senior Manager)

Print Full name clearly _____ Date _____

EVC Email _____

Please complete this form and send it with your wild country / Dof E routes if appropriate.
To The Education Visits Adviser: Safety Services (WS), P.O. Box 15630, Birmingham,
B2 2QF or E-mail : schoolsafety@birmingham.gov.uk
Telephone: 0121 464 8564

Contact Person: Tom Lilley 07980266367

To arrive at least four weeks before the proposed visit.

FORM OSV 2005

Section 10

NOTIFICATION OF OVERSEAS VISITS/EXPEDITIONS

This form should be photocopied or submitted electronically and used for notification of any Overseas Visits

USING THIS FORM

Establishments Notifying LA – Complete Part 1 & 2
– Ensure each part is signed by the appropriate person

PART 1 TO BE COMPLETED BY ALL BY ALL SCHOOLS, CENTRES OR OTHER ESTABLISHMENTS

Name of Establishment/School _____ Tel. _____

Address _____

Overseas Notification

Date of visit from _____ to _____

Full Name of Visit Leader _____ Email _____

Total Young People _____ Male _____ Female _____ Age range _____

Reason for visit (please list) _____

Geographical location, place / area.
(Please be specific) _____

Signature of Visit Leader _____ Notification of Visit Date _____

If you are doing any Adventurous Activities please complete Outdoor Activities Form OE 2005 in Section 8 to accompany this notification form

PART 2

Names of all accompanying adults
(Please indicate whether male/female (m/f);
staff (s); parent (p); governor (g); volunteer (v)

Relevant qualifications/experience

_____	_____
_____	_____
_____	_____
_____	_____

Accommodation Address whilst Overseas _____

_____ Tel _____

If the activities are wholly or partly provided by a commercial company or independent organisation, please state:

Name of Company/Organisation _____
Company Address _____

Tel _____

Please state the activities, which will be under the direct control of:

i) LA employees _____
ii) Hired instructors _____

Emergency Contact Names 1) _____ Tel: _____
2) _____ Tel: _____
(Representatives of School, Unit or Centre who can be contacted by Leader or LA in an emergency)

I confirm that appropriate insurance has been effected and that adequate emergency procedures are in place

Signed _____ (EVC/ Head Teacher/Senior Manager)

Please print full name clearly _____ Date _____
EVC Email _____

To The Education Visits Adviser: Safety Services (WS), P.O. Box 15630, Birmingham, B2 2QF or E-mail : schoolsafety@birmingham.gov.uk
Telephone: 0121 464 8564 Contact Person: Tom Lilley 07980266367
To arrive at least four weeks before the proposed visit.

For expeditions and visits in remote areas/countries at least 6 months notice is required.

Birmingham City Council or <<Name of DLC>> DofE Expedition Policy

All Directly Licenced Centres (DLC) in Birmingham who are a BCC Maintained school, or purchase a contract/service level agreement (SLA) for support for educational visits and learning outside the classroom activities, must follow this policy and the notification processes for educational visits and learning outside the classroom activities provided by Birmingham City Council.

All DLCs who have adopted this policy (e.g. schools, academies, trusts and other organisations) must follow this policy and the policies, guidance and notification processes for educational visits and learning outside the classroom activities from their employer/board of Trustees/ Management Body or Governors.

All Centres operating under the Operating Authority Licence of Birmingham City Council must follow this policy and the approval processes stated in their SLA with BCC.

Leaders Qualifications

Within the parameters of this policy the appropriate way of proving competence is by undertaking National Governing Body Qualifications (NGB) and maintaining an up to date log book of experience. The table gives the qualification requirements for levels of terrain for walking expeditions. Other modes of travel will require suitable qualifications for that discipline, e.g. cycling, canoeing. Expeditions carried out using alternative modes of travel should work to a similar policy which should be submitted to BCC / CERO.

The leaders qualifications need to be matched to the terrain in which the expedition teams will be working and for simplicity this terrain has been split into three distinct categories, please note this does **not** directly relate to Bronze, Silver and Gold Expeditions. (E.g. Wild Country as defined by the DofE can fall into both Level 2 and Level 3 terrain)

Terrain Level	Description of Terrain	NGB Qualification	First Aid required
Level 1	Low lying rural countryside, farmland, valleys, woodland and small areas of forest. Low lying glens and valleys from which reliable access to communication or external assistance is feasible without undue delay and without reliance on any portable communications device. Gentle to moderate rolling terrain.	Basic Expedition Leader (BEL) or Countryside Leader Award (CLA) or Lowland Leader (LL) ¹	Refer to any NGB Award requirements BEL = 8hrs CLA = 16hrs LL = 16hrs
Level 2	Terrain that includes open, uncultivated, non mountainous, high or remote country known variously as upland, moor, bog, fell, hill or down. Areas enclosed by well defined geographical or man made boundaries such as classified roads. Areas of remoteness that are easily exited in a few hours, returning to a refuge or an accessible road. Areas where movement on steep or rocky terrain is not required in either a planned or unplanned situation. (Areas that merge with mountain regions and do not have well defined boundaries are excluded)	Walking Group Leader (WGL) to be renamed Hill and Moorland Leader (HML) from April 2014 ¹	WGL/HML = 16 hr first aid course
Level 3	Any terrain including that above where there are no clear boundaries and are classed as mountainous or where steep or rocky terrain may be encountered.	Mountain Leader (ML) or above	ML = 16 hr first aid course

Note 1. Holders of the Lowland Leader and Hill and Moorland Leader awards wishing to supervise camping activities must hold the additional Expedition Module from MLT.

Ratios of Adults to Young People.

A minimum of 2 adults must accompany a DofE Expedition. If there are male & female participants, it is advisable to have a leader of each sex.

To allow the greatest flexibility either of the following expedition staffing ratios may be chosen:

Ratio A

One qualified DofE Supervisor may supervise up to three teams provided that they are within a reasonable distance of each other. The matrix below gives the minimum amount of staffing for expeditions:

One team	One DofE Supervisor and	Either an Assistant Supervisor or an Adult Helper
Two teams	One DofE Supervisor and	Either an Assistant Supervisor or an Adult Helper
Three Teams	One DofE Supervisor and	An Assistant Supervisor and either another Assistant Supervisor or an Adult Helper

Where more than 3 teams are out at the same time the ratios increase proportionally; i.e. 5 teams would require a minimum of 2 Supervisors, 1 Assistant Supervisors and 2 Adult helpers.

Ratio B

Where a greater number of qualified staff are present, and the teams are in reasonable proximity, then the following ratios may be followed.

One team	One DofE Supervisor and	Either an another Supervisor, an Assistant Supervisor or an Adult Helper	
Two teams	One DofE Supervisor and	Either an another Supervisor, an Assistant Supervisor or an Adult Helper	
Three Teams	Two DofE Supervisors	In Terrain 1 Where there are only two members of staff supervising more than 2 teams serious consideration must be given to the emergency plan should one member of staff be incapacitated or need to take a participant to hospital. In these instances a third member of staff may be required. This is determined by the initial and dynamic risk assessment processes.	In Terrain 2 & 3 A third member of staff is required which may be another Supervisor, Assistant Supervisor or an Adult Helper.
Four Teams	Two DofE Supervisors		

For greater than 4 teams the ratio of 1 Supervisor to 2 teams must be maintained, e.g. 5 teams will require 3 supervisors.

Note:

Ratio A is more applicable where there are less qualified staff, but more adults to help, and ratio B is more applicable where there are a number of qualified staff, who therefore need less supporting staff.

Risk Assessment

Supervisors at all times should consider suitable and sufficient risk assessment taking into account all relevant factors before and during the expedition. Bad weather routes for expeditions in Wild Country must be planned in advance.

Roles and Responsibilities

Name	Responsibilities	Minimum Qualifications
Supervisor	<ol style="list-style-type: none"> 1. Responsible for overseeing the safety of Expeditions. 2. Responsible for the standards of training and the signing of the training page on Participant's record books. 3. Responsible for the management of the work of the Assistant Supervisors and any adult helpers. 	<ol style="list-style-type: none"> 1. National Governing Body qualification appropriate to the expedition terrain.. (e.g. BEL, CLA, LL, WGL/HML, ML, BCU NGB) 2. First Aid Certificate (refer to NGB Award requirements) 3. Have undertaken the DofE Expedition Supervisor Training Course 4. Possess knowledge & understanding of all relevant policies and procedures for educational visits, learning outside the classroom activities and off site visits 5. Familiar with the area where expedition is taking place.
Assistant Supervisor**	<p>Works under the direction of the DofE Supervisor.</p> <ol style="list-style-type: none"> 1. To assist in the training of participants. 2. To support the Supervisor in the supervision of team(s) whilst on their expedition 3. To be able to act on own initiative should it be necessary 	<ol style="list-style-type: none"> 1. Working towards an appropriate NGB qualification**. 2. First Aid Certificate (refer to NGB Award requirements) 3. Possess knowledge & understanding of all relevant policies and procedures for educational visits, learning outside the classroom activities and off site visits 4. Familiarisation with the area in which the expedition is to take place. <p>Those leaders wishing to be an Assistant Supervisor in Wild Country must hold the BEL, CLA or LL qualification and be working towards WGL/HML or ML</p>
Adult Helper	<p>Works under the direction of the Supervisor</p> <ol style="list-style-type: none"> 1. To contribute to the safety of the activity 2. To contribute to the training of participants 3. To understand and be fully conversant with safety procedures. 	<p>Adjudged by the EVC/ Organisation Head/Manager with advice from the Supervisor to be competent to support the activity.</p> <ol style="list-style-type: none"> 1. Ideally possess knowledge & understanding of First Aid 2. Ideally should have a basic knowledge of the area 3. Have undertaken appropriate safeguarding checks.

****Assistant Supervisor**

For someone to be regarded as working towards an appropriate NGB qualification they must be able to evidence that they have undertaken the appropriate training course within the last 3 years and have an up to date log book which demonstrates that they are gaining the experience and competency required for assessment. Attendance alone at a training course is not sufficient, nor is attendance at a training course without the intention to gain the qualification.

First Aid

All leaders with National Governing Body Qualifications must have a valid first aid certificate of the appropriate duration at all times. First Aid Qualifications should include CPR, Bleeding, Shock, Drowning, Hypo and Hyperthermia, Broken Bones and basic treatment of minor injuries. Please check before booking a course as some 6hr and 7hr courses will probably NOT be appropriate

Maintaining records of Staff and Volunteers

BCC and or <<Name of DLC>> will require National Governing Body qualifications to be available for verification. A register/portfolio of these qualifications will be maintained, which keeps copies of the documents and will be updated. It is BCC's /<<Name of DLC>> policy to undertake an enhanced Disclosure and Barring Service (DBS) check on all volunteers or to ensure that this has been done by their employers.

DofE Enrolment & Participants from other centres

It is a requirement that all young people on an Expedition have enrolled with the DofE and are set up on eDofE. No participants from other Operating Authorities or DLCs can be accepted onto DofE Expeditions unless prior consultation has taken place with the Regional Office.

Scope of Qualifications

All National Governing Body Qualifications listed in the matrix on page one are for operation in Summer Conditions only. Supervisors should be aware that in some areas Winter Conditions can prevail at any time of year.

The Delivery of DofE Expeditions

DofE Supervisors delivering Expedition Training, Practice Expeditions and Assessed Expeditions, must at all times follow the appropriate guidance as laid down in the DofE Handbook and Expedition Guide.

Notification of intention to run DofE Expeditions

The DofE Manager must ensure that all expeditions meet the 20 conditions. All Expeditions must be approved by the appropriate Educational Visits Co-ordinator/Head Teacher/Manager.

Expeditions in one of the listed DofE Wild Country Areas must be notified to the DofE Area Network Expedition Co-ordinator on a **Green Form**, the timescales and instructions on the form must be adhered to. For Expeditions in the White Peak, the Peak District Network Expedition Co-ordinator should be informed using a **Red Form**. Red forms are for notification only. Teams will not receive a response unless the Co-ordinator needs to bring some local information to the centre's attention.

Expeditions Abroad

Expeditions abroad represent a substantial investment for leaders and participants alike and it is vital that plans are submitted in good time to ensure that full approval can be granted for these trips. Please use the DofE **Blue Form** for Overseas Expeditions

In addition to the EVC's approval and the DofE Manager's approval, all DofE Expeditions abroad must be approved by the Regional Office of the DofE. To allow time for the approval of these Expeditions notifications should be submitted 12 weeks before departure, preferably earlier.

Variations to the 20 conditions

If a leader believes that an individual or a team will not be able to meet one of the 20 conditions of the Expedition section then a variation form should be submitted. This form can be downloaded from www.DofE.org/go/downloads and should be submitted to the DofE Manager for approval. DLC DofE Managers must then submit this to the DofE Regional Office. This should be done before any expedition planning takes place.

Assessors

All expedition teams must be assessed using an accredited assessor who is appointed to the Licenced Organisation. This means that they must have a valid assessor ID card, and must have been approved by the Licenced Organisation/AAP/DofE Network for whom they are assessing.

Those individuals wishing to become assessors should meet the same level of competence as listed in the matrix on page 1. However, highly experienced individuals may prove competency through other appropriate means, as critically the assessor is not responsible for the Health and Safety of the expedition team.

Signed

DofE Manager

Date

Signed

EVC/Head/Manager