

“There and Back  
Again”

The Outdoor  
Education  
Handbook



MERTON COUNCIL

# Section 1 Decision Making

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## Deciding on educational and recreational visits

1. This section defines the scheme of delegation for approving educational and recreational visits within Children's Services, London Borough of Merton. The section begins by outlining the key responsibilities under the Health and Safety at Work Act 1974. From this flows the structure designed to implement these duties, defining the roles and responsibilities of those organising and leading educational and recreational activities.

## Health and Safety at Work Act 1974

2. Under the Health and Safety at Work Act the London Borough of Merton is required to ensure, so far as is reasonably practicable, the health, safety and welfare of its employees at work. The Borough owes the same duty to anyone else on the premises or anyone who may be affected by their activities. This includes participants in educational and recreational activities.
3. In addition to the staff directly employed within Children, Schools & Families, the London Borough of Merton is the employer of the majority of staff in community schools, community special schools, maintained nursery schools, children's centres, pupil/children referral units and a residential children's home within the Borough. In Voluntary Aided Schools, Foundation Schools and Academies, the governing body is the employer of staff.
4. The Management of Health and Safety at Work Regulations 1999 requires an employer to:
  - assess the risks of activities (see Risk Assessments in Section 2);
  - introduce measures to control those risks;
  - tell their employees about these measures.
5. Also, under the Health and Safety legislation employees must:
  - take reasonable care of their own and others' health and safety;
  - co-operate with their employers over safety matters;
  - carry out activities in accordance with training and instructions;
  - inform their employers of any serious risks.
6. These duties apply equally to educational and recreational activities as they do to school based activities. Responsibility for Health and Safety is delegated via Merton Borough's policy to School Headteachers and identified Managers within Children's Services. The Borough retains responsibility for advice, handbook, monitoring and review. Detailed advice on the procedures for making Risk Assessments can be found in Section 2.

## Scheme of Delegation

7. A guide to the responsibilities expected of Children's Services, Headteachers and Managers, Educational Visits Coordinators (EVC), Party leaders or other stakeholders are outlined under 'control measures' and 'any further action' in the generic risk assessment below. The specific delegated roles and tasks are based upon the following generic risk assessment that applies to visits arranged by schools, children's centres, and children's homes and all other

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employees. Commissioned services may adopt this guidance or have their own advice of a similar nature but this must comply with criteria as set out in the Children's Services commissioning standards.



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## Risk Assessment- All Educational & Recreational Activities

Establishment: Children's Services

Assessment Date: 27/02/13

Activity: Educational and recreational visits, trips and journeys. Completed by: Mike Penny (Outdoor Education Adviser)

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected</b>	<b>Control Measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures.</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</i>
<p>Hazards associated with travelling to/from venues.</p> <p>Road traffic accidents both as an occupant of a vehicle and as a pedestrian resulting in serious injury or death.</p> <p>Assault resulting in injury.</p> <p>Child going missing.</p> <p>All these could result in disruption or termination of travel.</p>	<p>Staff/Young People/ Members of the public</p>	<ol style="list-style-type: none"> <li>1. Generic control measures specific to modes of transport produced by Children's Services. Refer to section 2.</li> <li>2. Specific control measures relating to supervision of each group produced by the Party Leader and EVC.</li> <li>3. Specific measures for managing an emergency produced by EVC/Party Leader.</li> <li>4. On going control measures overseen by party leader.</li> </ol>	<ol style="list-style-type: none"> <li>1. Children's Services, with specialist advice from appointed Adviser for Outdoor Education will review and update control measures in response to changing circumstances, e.g. terrorism</li> <li>2. The Headteacher/Manager to ensure staff competence.</li> <li>3. The Headteacher/Manager to ensure staff competence</li> </ol>
<p>Hazards associated with undertaking the activities designed to meet the objectives for each visit. Although most of the risks for these activities will be associated with a specific activity and picked up by the specific risk assessment, such as drowning whilst undertaking a paddling activity, in general risks are:</p> <ul style="list-style-type: none"> <li>• Injury from slipping, tripping ,falling</li> <li>• Falling from height</li> <li>• Injury while handling, lifting,</li> </ul>	<p>Staff/Young People/ Members of the public</p>	<ol style="list-style-type: none"> <li>1. Generic control measures specific to most activities produced by Children's Services</li> <li>2. Specific control measures relating to supervision of each group, produced by the Party Leader and EVC</li> <li>3. On going control measures overseen by party leader</li> </ol>	<ol style="list-style-type: none"> <li>1. Children's Services will review and update control measures in response to changing national guidelines, e.g. new DfE guidelines</li> <li>2. The Headteacher/Manager to ensure staff competence</li> <li>3. The Headteacher/Manager to ensure staff competence</li> </ol>

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carrying			
<p>Hazards associated with the social and communal aspects of a visit:</p> <ul style="list-style-type: none"> <li>• Asphyxiation or burns from a fire occurring in a hostel or centre.</li> <li>• Food poisoning from poor kitchen hygiene.</li> <li>• Assault from intruders resulting from poor centre security.</li> </ul>	<p>Staff/Young people/ Members of the public</p>	<ol style="list-style-type: none"> <li>1. Generic control measures relevant to most venues produced by Children's Services.</li> <li>2. Specific control measures relating to the welfare of each group, produced by the Party Leader and EVC</li> <li>3. On going control measures overseen by party leader</li> </ol>	<ol style="list-style-type: none"> <li>1. Children's Services will review and update control measures in response to changing national guidelines, e.g. new DfE guidelines.</li> <li>2. The Headteacher/Manager to ensure staff competence.</li> <li>3. The Headteacher/Manager to ensure staff competence</li> </ol>

**Review procedure:** There and Back Again: This risk assessment should be reviewed following relevant changes to legislation, national guidelines or risk rating.

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8. The scheme of delegation is based upon this risk assessment. There are two underpinning principles for the scheme.
  - First, the Headteacher/Manager is appointed to provide overall leadership for each school, centre or service. Every educational and recreational visit takes place because it is expected to enhance learning and offer an experience for young people attending the activity. The scheme of delegation is consistent with this principle and with the principles underpinning the delegation of H&S tasks. Curriculum and safety advice is available from the local authority (LA), but it is the task of Headteachers and Managers to sanction each visit.
  - Second, the safe conduct of all visits depends fundamentally upon the competence of the team that oversees and leads each venture. Whilst the LA, through generic risk assessments, can set minimum standards of training, qualifications and experience to lead certain activities, the only person uniquely placed to judge a leader's competence is the Headteacher or Manager.
9. LA approval is still sought regarding over-seas expeditions (involving remote trekking and or sailing). The assessment of risk associated with this kind of activities is specialised and must be referred to the Educational Visits Adviser for approval.
10. The LA still requires notification of defined activities for the purposes of safety management. These activities are defined below.

### **Roles and Responsibilities for Educational and Recreational Activities within Children's Services**

Children's Services will provide the following:

#### Structure Chart

11. Children's Services will provide a structure chart identifying the key managers responsible for approving off-site visits.

#### Handbook

12. This guidance will be made available to all Children's Services establishments including the Duke of Edinburgh's Award Scheme (Merton). Children's Services will periodically review the handbook and inform all establishments of relevant changes in procedures or legislation. The guidance should be used by Children's Services establishments as a self-audit guide, ensuring that their organising of educational and recreational activities is in line with best practice.

#### Adviser

13. The London Borough of Merton employs an adviser for outdoor education, the Director of Outdoor Education, Widehorizons Outdoor Education Trust. The post holder is available to give advice on all aspects of outdoor education. The adviser can be contacted at:  
**Widehorizons Outdoor Education Trust, c/o Environmental Curriculum Centre,  
77Bexley Road, Eltham, London SE9 2PE  
Tel 020 8850 1581/1760. Fax 020 8850 2615.**

For Health and Safety Advice contact the **Health and Safety Team. 020-8545 3384**  
[HEALTHSAFE@merton.gov.uk](mailto:HEALTHSAFE@merton.gov.uk)



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## Risk Assessment

14. Children's Services will provide 'generic risk assessments' to schools and other establishments. The assessments highlight common risks and are collated and issued in Section 2 of 'There and Back Again', these will be available electronically on the Merton Intranet and Schools Extranet.

## Educational Visits Coordinator Training

15. The Adviser for Outdoor Education will provide training and support for Educational Visit Coordinators (EVCs). EVC training will be delivered by trainers accredited by the Outdoor Education Advisers' Panel. Widehorizons can provide support to academies, voluntary aided and foundation schools on condition that they appoint and train an EVC. There is no requirement for trained EVCs to re-validate, however it is good practice as part of continuous professional development that EVCs attend relevant briefings and courses. EVCs appointed from another local authority are acceptable as long as an accredited Outdoor Education Advisers' Panel trainer delivered the course. The requirement to have an EVC is a standard set by Children's Services and the appointed Educational Visits Adviser as part of good practice.

## Leadership Training

16. The Adviser for Outdoor Environmental Education will provide schools and children's establishments with a list of relevant leadership training courses. Courses will be advertised directly to EVCs as well as listed on the Widehorizons website ([www.widehorizons.org.uk](http://www.widehorizons.org.uk)). Courses may also be advertised in bulletins and newsletters issued by Children's Services from time to time.

## Approval

17. The task of approving all educational and recreational visits is delegated to Headteachers and Managers with the exception of overseas expeditions. Overseas expeditions include challenging adventures to remote locations involving trekking, sailing or kayaking, off-piste skiing, glacier travel. They do not include European exchange visits, cultural visits or organised on-piste skiing with qualified instructors. Headteachers and Managers should seek advice on all overseas visits if the activity is new to the school and the Educational Visits Coordinator has not previously supervised such ventures.

## Critical Incident Management

18. Merton will provide schools with support in the event of a critical incident. Foundation, VA and Academies who enrol with the services of the Council will get similar support.

## Monitoring

19. Merton Health and Safety Team will monitor schools, Children's Establishments and Merton's Children home procedures and practices in the following ways:
  - A register of EVCs will be maintained by the Health and Safety Team and annually updated. New EVCs will be required to attend an accredited EVC training course.
  - Annual self-evaluation (in schools via the Governing Body Reports see below)
  - H&S monitoring by the Council's Health and Safety Team either by self-planned visits or by a full H&S audit.

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- The outdoor education adviser will monitor by pre-arrangement, school lead camping and adventure courses.
- Providers delivering commissioned projects will be expected to have their own arrangements for monitoring and compliance.

### *Compliance*

20. Headteachers and Managers must nominate an EVC or assume the role themselves. The EVC should attend the training course. The Director of Children's Services may withdraw permission to embark on visits for reason of non-compliance.

### *Charging and Remissions policy*

21. Schools are expected to operate to standards provided by the School Finance Manual in charging and remissions. This policy is essential for out-of-school visits, providing the statutory framework for seeking voluntary contributions from parents as well as the charging and remission for residential board and lodging costs.

## **Governing Bodies (Community Schools)**

22. The governing body in a community school plays an important role in the conduct of visits. As well as contributing to children and young people's achievement in a unique manner, organising of educational and recreational visits can involve a great deal of discussion, controversy and voicing of opinions. Not only can issues of Health and Safety be contentious, but there are also significant resource issues to be considered. Most visits are funded by voluntary contributions from parents raising issues of equity and inclusion. Also the governors have a statutory responsibility to cover the board and lodging costs of residential visits for eligible parents, which for many schools can have a significant impact on the budget. Clear governing body policies are therefore important, to support Headteachers and teachers deliver positive and safe programmes of study.

### *Key Tasks- Governing Bodies (Community Schools)*

23. Governors should endorse the procedures and subsequent approved amendments to 'There and Back Again'. It is not necessary for governing bodies to re-write the document, but additions reflecting specific school policies and practices are encouraged.

24. Specific school policies may include:

- The forward planning of specific visits, especially those with large resource implications.
- Procedures for the up-keep of specialist equipment used by the school, for example minibuses.
- Practices and procedures for termly/annual parental consents for regular cultural and sporting events.

25. The approval of visits: It is normal practice for Headteachers to approve the final arrangements for visits, however governors may wish to endorse arrangements for certain visits, for example residential visits.

26. Monitoring: The governors play an important role in monitoring educational and recreational visits. This should happen in three ways;

- As part of regular health and safety agenda items;
- An annual report compiled by Headteacher/Manager and or EVC;

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- Complying with reports and recommendations of audits conducted by the LA.

### **Governing Bodies (Voluntary Aided and Foundation Schools and Academies)**

27. The governing body is the employer in voluntary aided, foundation and Academy schools and is therefore responsible for health and safety. Governing bodies in the London Borough of Merton may use the 'There and Back Again' document as the basis for developing policy; however the Governors must ensure that they are able to meet the standards of the LA policy including having critical incident management procedures.

### **The Headteacher and Managers**

28. They should ensure that educational and recreational activities comply with the procedures in this handbook and the agreed procedures of the governing body or local policies agreed by the Headteacher or Manager.

#### *Key Tasks- Headteachers and Managers*

- Delegate approval of defined visits to the EVC
- Support staff development of leadership competence through continuous professional development
- With advice from the EVC, appoint party leaders and additional staff who are sufficiently experienced and competent to assess and manage the risks with regard to the group and planned activity
- Ensure that risks have been assessed, significant risks recorded and appropriate safety measures are in place and that all parties are aware of the assessments and ensure that all staff understand and comply
- See that the final planning checklist is completed and all supporting documents are completed before the journey takes place
- Ensure formal approval is given to each journey or visit
- Comply with LA monitoring arrangements and agree with the EVC a system for monitoring visits.

### **The Educational Visits Coordinator (EVC)**

29. All schools and children's establishments must have a designated Educational Visits Coordinator (EVC). This may be the Headteacher, senior teacher or senior staff who in the view of the Headteacher or Manager is competent to undertake delegated tasks.

#### *Key Tasks- The Educational Visits Coordinator (EVC)*

- support the Headteacher or Manager with approval;
- approve visits;
- assign competent people to lead or otherwise supervise a visit;
- support the party leader with advice and handbook on generic risk assessments;
- review and approve the risk assessment produced by the party leader and team for each visit;
- organise the emergency arrangements and ensure there is an emergency contact for each visit;
- keep records of individual visits including reports of accidents and 'near-accidents' (sometimes known as 'near misses') following the Council's procedures;

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- review systems and monitor practice.

### The Party Leader

30. The party leader has overall responsibility for the supervision and conduct of the visit or activity and should be approved by the Headteacher or Manager.

#### *Key Tasks- The Party Leader*

- complete a written curriculum plan or planner for the visit
- obtain the approval of the Headteacher, Manager or EVC before any visit or activity takes place
- assess the reasonably foreseeable risks involved and draw up or amend as appropriate any previously recorded risk assessment
- oversee the safe conduct of each visit, paying particular attention to on-going risk assessments and changing circumstances
- ensure that all other members of staff and voluntary helpers are aware of their responsibilities and have the appropriate training and experience to undertake their assigned roles
- consider the planning checklist to ensure that all procedures have been followed
- inform parents about the visit and gain their consent, where appropriate

### Additional members of staff and volunteers

31. Members of staff and volunteers will often make up the team for each visit. They must be given written instructions to ensure that they are familiar with procedures/protocols.

#### *Key Tasks - Additional members of staff and volunteers*

- assist the party leader to ensure the health, safety and welfare of all the young people on the visit
- ensure to understand your roles and responsibilities whilst taking part in the visit or activity

### Children and Young People

32. Whilst taking part in educational and recreational activities, children and young people also have responsibilities about which they should be made aware by the leaders, for their own health and safety and that of the group. They should:

- not take unnecessary risks
- follow instructions of the party leader and other members of staff
- behave sensibly, keeping to any agreed code of conduct
- inform members of staff of any significant hazards.

### Parents

33. Parents have an important role in deciding whether any visit or activity is suitable for their child. Parents should:

- inform the party leader about any medical, psychological or physical condition relevant to the visit
- provide emergency contact numbers
- provide the party leader with arrangements to resume care of their child should this be necessary

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- sign the consent form.
1. The procedures and range of functions necessary to undertake these tasks are outlined in the next section: Section 2 Guidelines for Designing a Safe Programme.

## Section 2 National and Local Guidelines

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## Section 2 National and Local Guidelines

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### National Guidelines

1. The London Borough of Merton has adopted the National Guidelines for the management of outdoor learning, off-site visits and learning outside the classroom. The guidelines are accessible over the internet at:

**[www.oeapng.info](http://www.oeapng.info)**

This comprehensive site is managed by the Outdoor Education Advisers' Panel; it is regularly updated and reflects best practice in safety management for outdoor education.

### Local Guidelines

2. The Borough of Merton has specific guidelines. These are available below as well as on-line on the Council's Intranet and Schools Extranet.
3. For up to date advice on Accident Reporting please contact:  
Health and Safety Team 020 8545 3384 email: [HEALTHSAFE@merton.gov.uk](mailto:HEALTHSAFE@merton.gov.uk)

The National Guidance has excellent resources on risk management. The local guidance below gives specific advice and standard forms for the following;

- Programme Plans
- A Risk Assessment Form
- Example Risk Assessments
- Generic Risk Assessments and Safety Protocols
- Competencies for School Lead Activities
- Example Behaviour Code
- Standard Parental Agreement Form
- Emergency Procedure
- School or Service Approval Form

## Section 2 National and Local Guidelines

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### Programme Plans

4. The programme plan defines the curriculum purpose of the visit. Whilst the detail of a programme plan will vary, it is the reason for embarking on educational and recreational visits.

The plan has three functions:

- It informs parents of why and what they are consenting to
- It informs everyone involved about the educational value of an activity balanced against the costs of the undertaking
- It is a pre-requisite of risk management. Having a clear purpose for carrying out an activity enables a clear analysis of the risks. It remains a sad fact that most of the tragic accidents of recent years have occurred due to a lack of clarity of purpose, i.e. an understanding of 'why are we doing this'?

### *Designing a 'Programme Planner'*

5. The diversity of the task requires a flexible, almost tailor-made approach to each planner. The arrangements made for frequently occurring day visits to common places will be very different, and more detailed than those made for a week's residential visit to a new location. However, there are some common ingredients:

- A definition of the overall educational purpose of the programme.
- The activities planned for each day(s) should be outlined, including:
  - specific objectives of the day
  - activity
  - the locations visited.
- The lead organisation and accompanying adults should be identified. The planner should list:
  - who is responsible for the activity
  - overall and daily supervision arrangements
  - arrangements for supervision during breaks and at night.
- Alternative options should be outlined in the event, for example, in bad weather.
- The activities on the programme planner should be cross-referenced to the relevant risk assessments.

### The Categories of Programme Planners

#### *Frequently Occurring Day Visits*

7. Examples of these would be swimming sessions, sports fixtures and faith visits to places of worship. Parental consent may be needed for some activities and not for others. Faith visits for example form part of the ethos of a school and participation in visits to places of worship would normally be communicated to parents in a school prospectus or newsletter. Similarly swimming lessons would form part of the PE syllabus and participation should be expected. However parents need to be contacted to explain arrangements, kit lists and for the notification of infections. The programme planner for swimming would normally be drawn up by the Education Visit Coordinator and could follow a checklist format so that it can be used year on year:



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Year 6 Swimming Programme	Term:	
Aim	To ensure all children are water confident by end of KS2	
Objective	To achieve 25m for all children.	
Class	Year 6	Done
Budget	Costing completed/ Head approved	√
Dates	Monday mornings to half term 10-11am Waterfront Baths Booked	√
Teacher in Charge	Sharon Davis, class teacher	√
Letter to parents	Returned to Sharon	√
Risk Assessment	No 2 completed and Sharon inducted (see example below)	√
Review of Programme	Completed	√

### **Infrequent Day Visits**

8. A planner unique to the programme should be prepared. The environmental day centres managed by Widehorizons Education Trust have standard procedures that can be referred to parents on request.

### **Residential Programmes**

9. A visit is categorised as residential when the group have to stay one or more nights on the visit. A planner unique to the programme should be prepared before the journey or visit takes place. This should clearly identify the range of activities that are to be undertaken during the programme, and will be the basis for informing the children, parents and supervising staff of the arrangements. In engaging an organisation, the Headteacher/Manager must be satisfied that it is safe for the particular needs of their children. In practice this will involve a dialogue between a school and the provider, with the outcome being a transparent agreement on respective roles and responsibilities.

A daily management process should be established to:

- review the programme to date
  - finalise the day's activities both in response to the review and in the light of the day's weather
  - if required, produce a detailed day planner.
10. Where relevant, this process should be implemented in conjunction with the staff of the provider. A day planner should include appropriate checklists and itineraries, for example route cards for mountain expeditions and journey plans for kayaking expeditions. Skiing courses should include similar details, especially for the supervision arrangements for ski school and guided skiing.

### **Changes to Programme Plans**

11. Many accidents happen because of poor planning when programmes are changed. The process of programme planning must be flexible enough to accommodate the inevitable changes brought about, for example by bad weather conditions or illness. The following good practice should guide this process:

Changes made before a visit:

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- parents must agree to any significant changes to the programme - it is a good idea to anticipate any potential changes by presenting parents with 'other options' in the final consent letter
- changes made before the programme commences should be approved in writing by the Headteacher or Manager and if relevant, the principal manager of a provider organisation.

Changes made at the beginning of a day:

- there should be a clear process to review and plan changes to the programme, a morning staff meeting for example
- agreed changes should be subject to risk assessment and relevant control measures
- if agreed changes require a less senior staff to take charge of a group, there should be a transparent process of briefing and staff should consent to the arrangements by signature.

Changes during an activity:

- changes made by staff for safety reasons during an activity need not be recorded in the normal course of events. However, in the following circumstances a written record should be agreed in a field notebook:
  - for educational reasons, less senior staff agree to supervise an activity within their competence.
  - if there is dissent amongst adult leaders about the best course of action.

As a guide, the Wide Horizons residential centres use the following pro-forma to record changes during the week:

### Programme Variations

School \_\_\_\_\_

Dates of visit \_\_\_\_\_

The following changes have been made and agreed

### **Programme Variations**

Day	Am		Pm		ppm	
	Led by _____		Led by _____		Led by _____	
RA No.						
C of P						
Signed	Centre Staff	School Staff	Centre Staff	School Staff	Centre Staff	School Staff

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### Risk Assessments

12. It is a legal requirement under the Management of Health and Safety Regulations 1999 to assess the levels of risk at work, and take steps to eliminate or reduce it. An off-site programme involves work activities and will require a risk assessment to be undertaken, especially as it may involve less familiar areas.
13. The task of doing the risk assessment is delegated to the party leader, supported on the one hand by the staff and young people and on the other by the EVC and the LA (refer to Section 1, Scheme of Delegation). Further advice may be sought from the Health and Safety Team or Outdoor Education Adviser.
14. A key competence for the party leader is the ability to undertake 'suitable and sufficient' risk assessments. This competence can be developed in the course of helping prepare risk assessments, attending outdoor leadership courses where risk assessing is a component part, attending a specific course or by in-house training from an EVC. A really useful and supportive 'reminder' can be downloaded from the Health and Safety Executive website: [www.hse.gov.uk](http://www.hse.gov.uk), the title is 'Five Steps to Risk Assessment'.

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**Risk Assessment**

**Number** \_\_\_\_\_

Establishment: \_\_\_\_\_

Assessment Date: \_\_\_\_\_

Activity: \_\_\_\_\_

Completed by: \_\_\_\_\_

Date Reviewed: \_\_\_\_\_

Reviewed by: \_\_\_\_\_

No of Pupils

No of Staff

Person in charge of the activity:

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected</b>	<b>Control Measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</i>

What is your review procedure? \_\_\_\_\_

## Section 2 National and Local Guidelines

### Risk Assessment

### Example

Establishment: Waterside School

Assessment Date: 25/12/03

Activity: Year 6 Swimming

Completed by: Sharon Davis

Date Reviewed: M Spitz (EVC)

Reviewed by: 31/12/03

No of Pupils 28 No of Staff 3

Person in charge of the activity: Sharon Davis

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected</b>	<b>Control Measures</b> <small>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</small>	<b>Any Further Action</b> <small>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</small>
Road traffic – risk of injury or death  Site specific As above	Pupils and staff Members of the public  "	As generic risk assessment T1  <ul style="list-style-type: none"> <li>• Children in pairs</li> <li>• Billy Smith (SEN) supervised by support staff.</li> <li>• SD to lead, teaching assistant to tail</li> <li>• One road to cross (controlled)</li> <li>• Parents briefed and medical forms returned</li> </ul>	M Spitz briefed Sharon D on arrangements  Sharon/Mark walked the route as Sharon is new to the school
Cross Infection	Pupils	<ul style="list-style-type: none"> <li>• Parents briefed and medical forms returned</li> </ul>	Children asked weekly
Drowning	Pupils	As Generic Risk Assessment A1	Wavelengths contacted confirmed qualifications and lifeguard

What is your review procedure? programme reviewed

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### Generic Risk Assessments

15. Generic Risk Assessments identifying control measures to reduce the risk of harm from generic hazards. There are examples of the basic generic risk assessments below. Further examples can be found on the Merton Intranet and Schools Extranet [www.http//extranet.mertonlea.org](http://extranet.mertonlea.org) These assessments do not have to be written out in full but should be referred to on the risk assessment for the visit.

**Important note:** Only use Generic Risk Assessments that are approved by your employer. If you have found one from an outside source that controls a particular hazard effectively, complete it in full so that the EVC, Headteacher or Manager can approve it.

### Event or Site Specific Risk Assessment

16. The Party Leader must complete these assessments along with the staff team. The assessments relate to the hazards associated with the event or site and the nature of the children and young people in the party. This may require a site visit.

### On-going Risk Assessment

17. On-Going Risk Assessment is the dynamic process of identifying new levels of risk in response to changes in level of hazard and the behaviour of the party. It is not practicable to record these assessments in writing as they happen; however it is possible to identify the significant potential risks on a risk assessment.

### Risk Assessments and Third Party Providers

18. Other people and organisations provide many aspects of educational visits for schools. Examples include outdoor centres, transport providers, voluntary organisations and museums. It is the responsibility of these organisations to assess the risks of their provision.

**Important note:** It is not necessary for schools and establishments to copy or scrutinise all providers' risk assessments, just a verification that they do exist for the agreed programme. This at its simplest will be a written confirmation: "Can you confirm that you have assessed the risks for our programme?" and "How can you verify this?" The answer to the latter could be "they are published on our website "; "they are a condition of our Adventure Activities License, copy attached "; "they are on our CD"; "they are available to you in the visitors handbook".

### Using Generic Risk Assessments

19. It is important that generic risk assessments, associated checklists and protocols are used carefully. There must be evidence that those undertaking the visit have read them and applied them appropriately to the visit. Whenever they are used, the Educational Visit Coordinator should check and sign to this effect.

Only use generic risk assessments that are approved by the London Borough of Merton. If you come across a generic risk assessment from another source that controls the risks for your activity, use it only with the approval of the



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Headteacher/Manager. Please also submit it to the Health, Safety and Wellbeing Unit to be checked and formally adopted.

### **Generic Risk Assessments for Travel**

20. The use of all forms of transport to and from venues carries with it the risk of accidents and the real possibility of serious injury and loss of life. An accident can be caused as a direct effect of the actions of the party, failure of the mode of transport and actions of a third party. Party leaders have control over the former, some over the mode and none over the actions of third parties. The latter will normally be considered as an inherent risk that has to be accepted.

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### Risk Assessment -Walking in Urban Areas.

**Number T1**

**Establishment:** London Borough of Merton  
**Assessment date:**  
**Activity** Walking in urban areas  
**Completed by:**  
**Date reviewed:** 15/06/12  
**Reviewed by:**

08/06/12

Mike Penny

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people</i>	<b>Who may be affected</b>	<b>Control measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more</i>
Road traffic accident – risk of injury or death	Young people and staff, members of the public	Appropriate supervision – supervisors competent and briefed by group leader. Young people organised in manner suitable for age and behaviour (event specific). Young people briefed and educated in basic Road Safety – rules for keeping safe.	Roads crossed at pedestrian crossings. Route assessed by group leader – event specific Parents informed. Basic road safety rules covered with young people as appropriate prior to visit. Keep a note of changes to route (road works etc)

What is your review procedure?

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### Risk Assessment - Cars, Minibuses and Coaches. Number T2

**Establishment:** London Borough of Merton **Assessment date:** 08/06/12

**Activity** Travel by road, train, ferry and air

**Completed by:** Mike Penny **Date reviewed:** 15/06/12

**Reviewed by:**

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected?</b>	<b>Control Measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</i>
Road traffic accident – risk of injury or death.  Psychological harm from being lost. Sexual abuse.  Drowning on ferries  Falling from height. Struck by moving objects. Falling from moving objects.	Young people and staff	All drivers must hold appropriate licenses. All drivers correctly registered, maintained and road worthy. All vehicles insured. Seat belts worn as appropriate. Drop off/pick up arrangements covered in event specific/site specific risk assessment. An emergency plan completed for all journeys. Except in an emergency, don't leave 1 adult with 1 child. Young people always in rear seats in cars/minibuses. Supervision using generic protocols: cross reference with event/site specific risk assessment.	Check vehicle protocols in 'There and Back Again': Car protocol Minibus protocol Coach protocol Public transport protocol
What is your review procedure?			

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### The Environment - Built and Natural

21. There are hazards associated with places visited irrespective of travel or activity. The two key aspects are accommodation and the weather.

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### Risk Assessment - Residential Accommodation. Number E1

**Establishment:** London Borough of Merton

**Assessment date:** 01/06/12 **Activity** Residential Accommodation **Completed by:** Mike Penny

**Date reviewed:** 08/06/12 **Reviewed by:**

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected?</b>	<b>Control Measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</i>
Hypothermia	Staff and Young people	Preliminary briefing: bring warm clothing. Waterproofs. Unless provided, aware that young people waterproofs are inadequate. Plan activity to ensure that plan 'B' is always achievable.	Children's tolerance to cold varies. Monitor carefully.
Hyperthermia	As above	Plentiful supplies of drinking water. Care over duration of exposure to heat. Cover from direct sun (see below).	
Sun Burn	As Above	Prepare young people. Long sleeves/tracksuit bottoms. Sun hats. Medical form 'provide appropriate sun block' ask for any history of allergy. Take and use hypo-allergic sun block.	
Extreme weather rain wind Drowning	As above	Take heed of extreme weather conditions and adjust plans accordingly.	Keep a flexible approach to plans, have 'plan B' always in mind.

What is your review procedure?

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### Risk Assessment - All Outdoor Activity. Number E2

Establishment: London Borough of Merton Assessment Date: 01/06/12

Activity: All Outdoor Activities Completed by: Mike Penny

Date reviewed:

Reviewed by:

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected</b>	<b>Control Measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</i>
Falls from Height	Young people and staff	Balconies/windows checked. Bunks fitted with safety bar. Young people briefed.	Leaders should check all rooms on arrival and hold room briefings with young people
Fire	As above	Accommodation must be fitted with smoke and fire alarms. Evacuation plans, signs and fire doors operational.	Obtain confirmation from accommodation and or tour operator before travelling Organise a fire drill for your group
Poisoning: Chemicals and Food	As above	Provider must confirm protective procedures.	
Abduction and sexual abuse	As above	Ensure accommodation is secure, especially ground floors on hot summer nights. Ensure accommodation has no public access or can be supervised appropriately (especially in hotels).	Leaders to check arrangements on arrival. Supervision arrangements should be agreed with accommodation manager if secure space is not provided.

What is your review procedure?

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### Generic Activity Risk Assessments

22. A frequently occurring visit is a residential trip to an outdoor centre that provides a range of activities. The centre may be a field study centre, an environmental education centre, an outdoor pursuits centre or similar destination. In all these cases, the risk assessment and risk management process is specific to the centre and the activities that you have planned. There are however, basic principles. The school is responsible for assessing the risks of all the activities that it is providing. The providing centre is responsible for assessing the risks of all the activities it provides. The safety critical area is the overlap. It is important to be clear who is responsible for what, when activities change, for example from the afternoon to the evening.
23. An orienteering session run by centre staff in the afternoon is clearly the responsibility of the centre. The campfire or barbecue in the evening organised and led by the teachers is a school responsibility. The school must provide the risk assessment for this activity. A supportive centre will have a generic assessment for this activity and a safety protocol. The school may use this as long as there is evidence that they are working to the protocol. The evidence for this should be written into the school risk assessment, for example:

Hazard	Who may be affected	Control Measures	Any Further Action
Burns from the barbecue	Young people and staff	Barbecue protocol provided by the centre will be followed	Protocol to be rehearsed with centre staff prior to the activity

24. Schools do not need to have copies of all the risk assessments for activities provided by the Centre. They do need to have a confirmation that the centre has written risk assessments. Suitable evidence is a written confirmation from the centre or web-site evidence.

### *Event Specific Risk Assessments Examples*

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### Risk Assessment – Swimming. Number A1

**Establishment:** London Borough of Merton    **Assessment date:** 01/06/12

**Activity.** Swimming    **Completed by:** Mike Penny

**Date reviewed:**    **Reviewed by:**

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected</b>	<b>Control Measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</i>
Drowning	Young people and staff	<b>Planned Swimming lessons:</b> Qualified swimming teacher to direct pool activity. Lifeguard on duty. Agreed supervision roles for accompanying staff <b>Swimming as leisure activity/Occasional pool visits:</b> Lifeguards on duty and notified of group. School staff check pool layout and agree supervision rota. Non-swimmers directly supervised. <b>Paddling as leisure activity/Occasional seaside visits:</b> Paddling (water below knee) should only be undertaken once a protocol has been drawn up by the EVC/Visit leader	Lessons are usually planned well in advance and may have a Service Level Agreement with pool and pool providers, with clear roles/responsibilities agreed in writing.  Visits to the seaside could involve a paddle, but it must be very well organised.
Sexual Assault	Young people	Supervising staff CRB checked. Guidelines for changing agreed in an event specific and on-going RA. Direct supervision, never alone where access by others is possible.	

What is your Review Procedure?



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### Risk Assessment - Farm/Zoo Visits.

**Establishment:** London Borough of Merton

**Number A2**

**Assessment date:**

01/06/12

**Activity:**

**Completed by:**

Mike Penny

**Date reviewed:**

**Reviewed by:**

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected</b>	<b>Control Measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</i>
Falls from Height & Impact with moving vehicles	Staff and young people	Working farms should only be visited with prior agreement with the farmer. Complete a site specific assessment.	The National Farmers Union has a 'farm visit' programme, with farmers throughout the UK.
Infection: E.coli	Staff and young people	Follow Farm visit protocol. Section 5 of 'There and Back Again'. Fact sheet 0157 available from Foods Standards Agency	

What is your review procedure?

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### Risk Assessment - Outdoor & Adventurous Activities.

**Establishment:** London Borough of Merton

**Activity:** Outdoor and Adventurous Activities **Completed by:** Mike Penny

**Date reviewed:**

**Reviewed by:**

**NumberA3**

**Assessment date:** 08/06/12

<b>Hazard</b> <i>List significant hazards which may result in serious harm or affect several people.</i>	<b>Who may be affected</b>	<b>Control Measures</b> <i>List existing controls or note where the information may be found. (e.g. Information, instruction, training, systems or procedures)</i>	<b>Any Further Action</b> <i>List the risks which are not adequately controlled and proposed action where it is reasonably practicable to do more.</i>
Falls from Height/Impact with hard objects	Staff and young people	All climbing led by staff to competencies outlined below in There and Back Again Personal protective equipment (PPE) appropriate to the activity worn	Competencies agreed to national standards or verified by appropriately qualified person (Technical Expert)
Drowning	As above	All water activities and sports lead by staff to competencies outlined in section 5 of There and Back Again Personal protective equipment (PPE) appropriate to the activity worn	
Hypothermia/Hyperthermia	As above	Activities and PPE as above Leaders trained in First Aid appropriate to activity and qualification	
Burns	As above	All cooking activities lead by staff to competencies outlined in Section 5 of There and Back Again	
Poisoning	As above	Food handling procedures appropriate to activity Leaders trained to recognise anaphylaxis	
Abduction, Abuse	As above	Leaders checked by CRB Supervision arrangements covered in Site/Event Risk Assessment Emergency plan agreed with young people suitable and sufficient for their age, maturity and training	

What is your review procedure?



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### School Led Outdoor and Adventurous Activities

#### *All Outdoor Adventurous Activities*

25. School staff supervising adventurous activities must hold the relevant governing body qualifications or be assessed by a technical expert. Merton expects schools leaders to be at least as well trained as expected by the Adventure Activities Licensing Authority (AALA).
26. Appropriate qualifications can be found by searching the AALA website; [www.aala.org](http://www.aala.org) or Sports England website [www.sportengland.org/](http://www.sportengland.org/) or by contacting the outdoor education adviser: [info@widehorizons.org.uk](mailto:info@widehorizons.org.uk).

#### **Camping Expeditions**

##### *Fixed camps*

27. Leaders must attend an approved training course unless they already hold an award from a competent body. The course will cover all aspects of organising fixed camps including:
  - Food and personal hygiene
  - Cooking, the use of 'catering' systems and lightweight expedition stoves
  - The arrangement of tents
  - Security

##### *Low Level Expedition Camping (Duke of Edinburgh and Youth Award Schemes)*

28. Leaders must hold either the Basic Expedition Leader Award (BEL) or have attended a Mountain Leaders Training Course and have a recommendation from the Advisor for Outdoor Education.

#### **Climbing Artificial Walls and Climbing Towers**

29. Leaders must hold a Climbing Wall Award issued by Mountain Leader Training England.

#### **Ropes Courses**

##### *High Ropes*

30. Leaders must hold at least Climbing Wall Award and have attended a specific course of training recognised by the Borough or to the Standards of the Advisory Association of Ropes Courses and Initiatives (AARCI).

##### *Low Ropes Courses and 'Commando Courses'*

31. Merton has a training scheme specifically designed for such courses. Either this must be completed or a course approved by AARCI. External providers must demonstrate that instructors are trained to standards equivalent to these schemes. When military or police courses are used, the organisers must provide appropriate instructors to supervise the course.

##### *Fieldwork*

32. Members of staff who have not led fieldwork (geography/biology/geology) should attend a fieldwork safety course. Centres that provide fieldwork must have operating codes of practice in addition to appropriate risk assessments.

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### *Bathing and Swimming*

33. Occasionally outdoor education programmes will wish to offer swimming in the sea lakes or rivers for recreation. The conditions in which this activity is conducted will vary considerably and great care is required. If swimming is to take place all supervisory staff must hold a Royal Life Saving Association Bronze Award, or have extensive knowledge of the location, hold a current First Aid Award ( 2 or 4 day) and have a written risk assessment with appropriate control measures to supervise the activity.

### *Alpine Skiing*

34. The party leader must have obtained a Ski Course Organiser award Courses are provided by Snowsports England ([www.snowsportengland.org.uk](http://www.snowsportengland.org.uk)). The group leader should prepare participants for the ski trip in accordance with the guidance provided during the course.

Skiing Supervision: Dry Slope Skiing is advised as part of the preparation. Instructors must hold as a minimum an Artificial Ski Slope Instructor's Certificate or Club Instructor's Award.

Instructors at the resort should be approved local ski instructors employed by the local ski school or should hold a British Association of Ski Instructors Grade 3 qualification

At least 4 hours supervision (morning and afternoon) should be arranged with qualified instruction. School staff must not supervise any skiing activity unless they hold a British Alpine Ski award or equivalent. Participants must not be allowed to ski without supervision of qualified staff.

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### ADVENTURE HOLIDAY

My Adventure Code \_\_\_\_\_



My aim is to go on an adventure.

#### For me the adventure will;

- Let me do lots of exciting things, like climbing, abseiling, high ropes and camping.
- Make new friends.

*But to do this I must*

- be willing to take part
- be willing to take responsibility for myself and for my own actions,
- be willing to give up things I want to do for the benefit of others,
- respect the privacy and feelings of others
- respect the authority of all staff to take decisions

#### Accept that there is a bottom line **NO** to;

- individual or group behaviour that is destructive to the aims of the adventure,
- individual or group behaviour that could hurt others on the adventure
- individual or group behaviour that insults our hosts at the Centre and all the other people staying there

If I miss-behave:

I will agree to talk through the issues with the Adventure Leaders.

- I will agree to behave



- Or I will be sent home
- I am willing to work to this code.

Name \_\_\_\_\_ Signed. \_\_\_\_\_

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### Example Medical Consent Form

School/Organisation

1. Details of Journey

Destination:

From: (date/time) To: (date/time)

2. Medical and Dietary Information:

Full name of son/daughter: \_\_\_\_\_

- a. Does your son/daughter suffer from any conditions requiring medical treatment, including medication?

If YES, please give brief details:

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- b. To the best of your knowledge, has your son/daughter been in contact With any contagious or infectious diseases, or suffered from anything in the last four weeks that may be or become contagious or infectious?

If YES, please give brief details:

- c. Is your son/daughter allergic to any medication?

If YES please give brief details:

- d. Has your son/daughter received a tetanus injection in the last five years?  
YES/NO (delete as necessary).

- e. Please outline any special dietary requirements of your child:

I undertake to inform the organiser as soon as possible of any changes in the medical circumstances between now and the beginning of the journey. I also understand that in lifesaving circumstances emergency treatment could be given to my child without agreement.

3. Contacts:

I may be contacted by telephoning the following numbers:

Work: \_\_\_\_\_

Home: \_\_\_\_\_ Mobile \_\_\_\_\_



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My Home address is:

Post Code

If not available please contact:

Name: \_\_\_\_\_

Work Tel: \_\_\_\_\_

Home Tel: \_\_\_\_\_ Mobile \_\_\_\_\_

Address:

Post Code

Name, address and telephone number of family doctor:

Post Code  
Phone

1. Declaration

I agree to my son/daughter ..... (name) taking part in the journey. I have read the programme and agree that he/she can take part in the activities described. I also support the code of conduct agreed by my son/daughter.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Please let the organisers know if you have any further concerns.

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### Emergency Procedure Notes:

- Assess the nature and extent of the emergency.
- Make sure all other group members are accounted for, are safe from danger, well looked after and that young peoples' mobile phones are not used until permission is given.
- Make sure that there can be no recurrence of the dangers that created the emergency.
- Render first aid and attend to the casualty(ies) if any.
- Call the emergency services as required. The police will take statements. An adult in the party should accompany any casualties to hospital.
- Collect the remainder of the group and arrange for their return to base.
- Arrange for one adult to remain at the accident site to assist or liaise with the search/rescue/emergency services.
- Contact the centre/venue where you are staying and inform them.
- Contact the Headteacher, Manager or designated contact person.
- Give them the following information:
  - your name;
  - nature, date and time of the incident;
  - location of the incident;
  - details of injuries;
  - names and telephone numbers of all involved;
  - actions taken so far;
  - telephone numbers for future communication. For a serious incident, try to identify alternative phone numbers as lines could become jammed.
- If the press is involved before you have time to contact base, make no comment and refer them to the Council Press Office or to the local police.
- The Headteacher, Manager or designated contact person should rapidly appraise the situation. Where the incident is clearly serious he/she should immediately contact the following London Borough of Merton, Children's Services:

### In office hours:

**Children's Services 020 8545 3631**

**Out of office hours: MASCOT 020 8274 5940**

**Emergency control service MASCOT 020 8274 5940**

- The Emergency Control Service will make all necessary contacts (including Children's Services senior management) and establish incident procedures.
- The Emergency Control Service will contact the Press Office. All media interest should be channelled through them.
- The Head/Service Manager of the school or centre will arrange to contact parents as soon as possible and establish all necessary links locally.
- At the incident site, record all relevant details in writing as soon as possible. Record names and addresses of witnesses and names of emergency service officers.
- Restrict telephone calls to the essential and keep emergency numbers as clear as possible.

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Legal liability should not be discussed.

### Checklist for Headteachers and Managers

Journey Details.

To:

**Inclusive dates:**

No. staff:

No of Young People:

Age range:

Confirmed:

Copy of the final programme for the visit.

Copy of risk assessment(s)

Copy of the discipline code.

Details of accommodation to be used.

SCHOOL/SERVICE STAMP

Name:

Address:

Telephone No.:

Name of Venue/Centre Manager:

Confirmation that any outdoor centre used is either licensed by Adventure Activities Licensing Authority (AALA) or has provided evidence of risk assessments appropriate for your programme.

Name, address and telephone numbers of school/centre contacts: (*attached*)

Details of travel arrangements. Contact address of Tour Company/Coach Company, etc.

Copies of parental consent forms and contact telephone numbers and addresses.

Address of insurance company and policy number.

Council emergency number and press office number.

Approved: \_\_\_\_\_ Headteacher/Manager      Date: \_\_\_\_\_

Keep a copy of this form along with all the associated details of the journey or visit

### 35. Notes on the Approval Form

- Tick to confirm that arrangements have been made. Enter 'NR' if a box is not relevant
- For regular educational and recreational visits, for example to school playing fields, church, the swimming pool, simply complete one form for each academic year. Supporting paperwork, for example the risk assessment for the activity should still be on file, as should any paperwork with providers. An opportunity to regularly review educational and recreational events should be made at least annually.

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