



# **KINETON GREEN PRIMARY SCHOOL**

## **Guidance for Management of Educational Visits**

**June 2014**



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## Section 1. Introduction

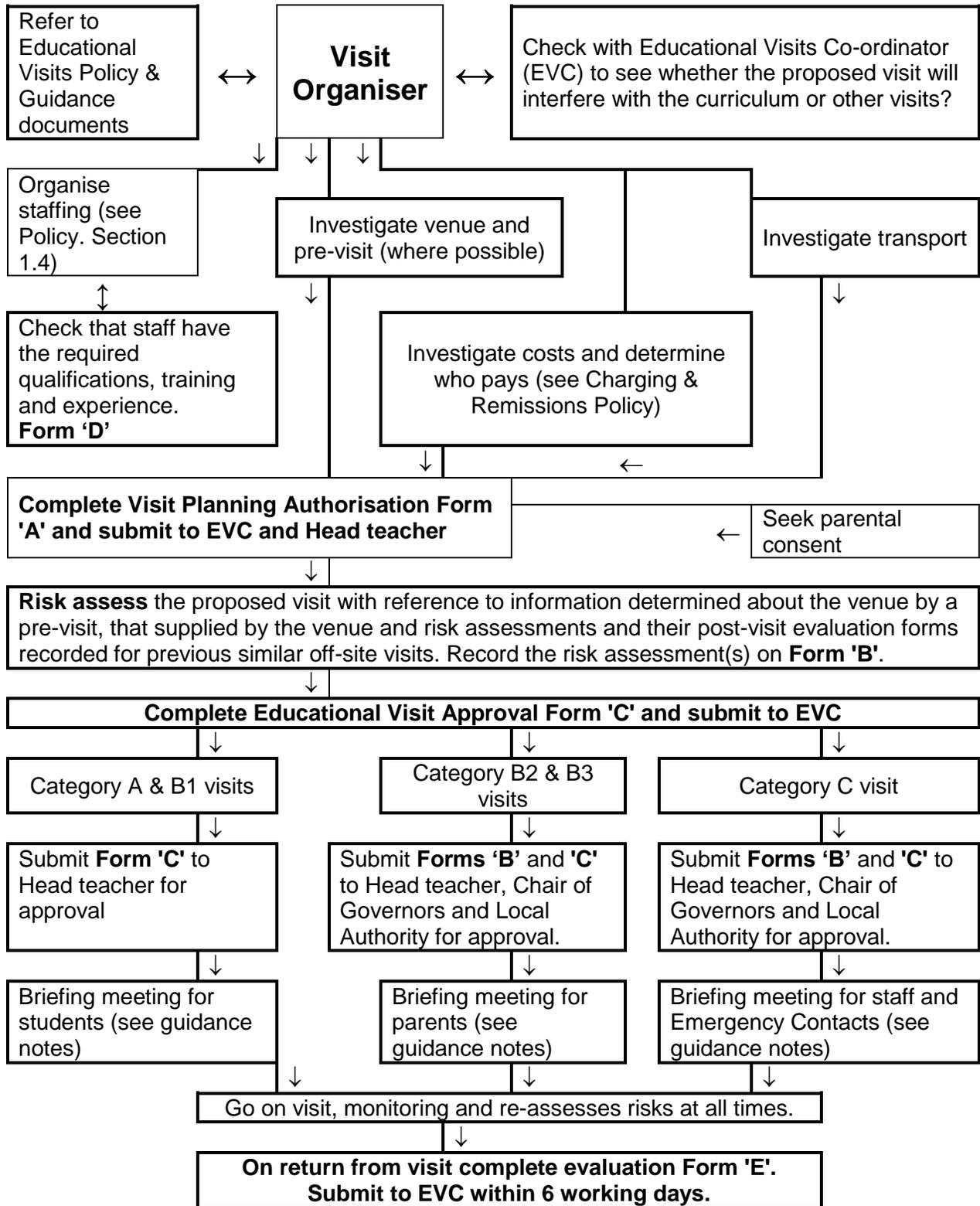
1. This document provides Guidance for use with the Authority's "*Management of Educational Visits: Policy and Procedures*" when planning and undertaking the majority of educational visits.
2. The policy and these guidance documents are intended to inform all those in Education and Children's Services Directorate who have a responsibility for the management of young people or adults taking part in educational visits. The information is designed to enable leaders and potential leaders to acquire the necessary knowledge, experience and confidence required to lead safe and rewarding visits and, where necessary, seek the appropriate further advice.
3. The policy and guidance documents have been written with due regard to the Good Practice Guide "*Health and Safety of Pupils on Educational Visits (HASPEV)*" published by the DfEE in 1998 and the Supplements published by the DfES in 2002. They are published as the Educational Visits Policy and Guidance for all schools and colleges within the Local Authority of Solihull.

## Section 2. Planning Educational Visits

58. The following guidelines are recommended to assist in preparing for, and organising, visits and journeys:
  - Planning
  - Internal Notification / Authorisation
  - Informing Parents
  - Parental Consent
  - Briefing Meetings
  - Codes of Conduct
  - Financial Consideration

The more thorough the planning, the more likely it is that the visit / journey will be successful and will achieve its objectives. The Authority's Educational Visit Planning Flow Chart is reproduced, below, from Section 3.6 of the Policy document ("*Management of Educational Visits: Policy and Procedures*").

**Educational Visit Planning Flow Chart**



## 2.1 Planning

59. A pre-visit is strongly advised. Where this is not possible alternative means of gaining background information must be considered. Examples of sources of information are found in Section 5.3.
60. Objectives for the visit should be suitable and achievable for the young people in the party and should be approved by the Head as required. It is highly desirable that the party leader has prior experience of the venue, type of visit and journey to be undertaken.
61. For all visits and journeys, Emergency Contacts must be nominated to be readily available in case an emergency occurs. **It is crucial that the nominated persons can be contacted at any time** – i.e. **“Off-duty” does not exist for Emergency Contacts: this is an essential ongoing role.** Consequently, it may be necessary (especially where journeys last several days or for reasons of expediency) that a reserve emergency contact person is also nominated and availability of contact times noted.

Should an emergency arise, the ‘emergency contact person’ is essential for both the group undertaking the journey and for parents. Even for day or shorter visits it is important that a contact number is available in case an emergency causes the visit to extend beyond the expected programme. This essential role is described in more detail in “Section 3.7 Emergency Procedures” of the Policy document.

62. An appropriate risk assessment should be made and recorded at this stage, using **Form ‘B’**.

## 2.2 Internal Notification /Authorisation.

The Team Leader should fill in a Management Authorisation Request (**Form ‘A’**) and submit it, together with the completed Risk Assessment (**Form ‘B’**), to the EVC and Head teacher. Once planning for the educational visit has been completed the Team Leader should complete the Educational Visit Approval (**Form ‘C’**) and submit it to the EVC. The EVC should then gain the appropriate approval signatures as determined by the visit category (see paragraph 1.5 in the Policy).

## 2.3 Informing Parents

63. Parents must be given full and complete written details concerning activities that take place off the site. Parents must be informed in writing of all visits even if they occur during normal accepted hours. If it is intended that a series of such visits take place as part of a course, then one letter informing parents of this should be sent before the programme of visits commences. It is important that parents are

specifically informed of any situations where activities extend beyond the normal day and where there are any alterations to the timetable.

64. Even with the best organised educational visits, last minute changes to arrangements may have to be made. Whilst it is desirable to convey information on these changes to parents, it is recognised that in some cases, for example pre-booked transport not arriving, this is not always possible. On these rare occasions it is acceptable to make alternative arrangements as long as it can be proved that appropriate risk assessments have been undertaken. This can be seen as part of the ongoing process of risk assessment normally associated with all educational visits.
65. When informing parents of the nature and purpose of any planned visit or journey, it is advisable to include the following items of information as a minimum:
- Venue and purpose of the visit
  - Date(s),
  - Place and departure / return times
  - Method of transport
  - Staffing details to include the name of the Team Leader and accompanying staff plus information regarding the experience and expertise of any activity centre staff
  - Content of the programme, including details of activities which may be undertaken
  - Details of any Code of Conduct relating to the standard of behaviour expected from students during the visit
  - Any necessary costs or voluntary contributions
  - Methods of payment and cancellation arrangements
  - Emergency contact telephone number, both at school and elsewhere
  - The need for any specialist clothing or equipment.
  - Relevant insurance details
66. Overnight visits, longer stays or visits abroad, where the transport, accommodation or other arrangements have been put together as a package by the “school” may well be affected by Government Regulations referring to package travel tours. (See Section 5, Visits Abroad.)

In such cases, the Head must ensure that a separate account / fund is established to administer the costs of the educational visit and sufficient funds are set aside to repatriate all group members should the need arise.

The following information must be provided to parents as far in advance of the trip as possible:

- Destination and the means, characteristics and categories of transport used.
- Type of accommodation, its location, category or degree of comfort and its main features and, where the accommodation is to be provided in a member state of the EC, its approval or tourist classification under the rules of that Member-State.

- Meals which are included in the package.
- The itinerary.
- General information about passport and visa requirements which apply for British citizens and health formalities required for the journey and the stay.
- Either the monetary amount or the percentage of the price which is to be paid on account and the timetable for payment of the balance.
- Whether a minimum number of persons is required for the package to take place and, if so, the deadline for informing the participants in the event of cancellation.
- The arrangements which apply if participants are delayed at the outward or homeward points of departure.
- The arrangements for security of money paid and for the repatriation of the participants in the event of insolvency/emergency.

## 2.4 Parental Consent

67. Parents must sign a consent form which should include:
- Name, address, date of birth and telephone number of participant.
  - The parents contact information.
  - An alternative contact with address and phone numbers.
  - Any allergies / phobias the young person may have.
  - Any medication the young person is taking (dosage and administration).
  - Any recent illnesses or contagious or infectious diseases in the preceding weeks.
  - Name, address and phone number of the young person's GP.
  - Any special medical / dietary requirements.
  - Any other information that the parent thinks should be known.
  - A statement of consent for the Supervisors giving permission for your child to receive medical treatment in an emergency.
  - A dated signature agreeing to the visit, medical consent and to confirm that they have received the information and are willing for their child to participate

(Example forms are included in Section 11: Sample Letters). For Category 'A' visits that recur throughout the school year, parents may be asked to sign a 'blanket' consent form for the whole year instead of a form for each visit.

68. Medication provided by the parent must be accompanied with written directions for its use. All Supervisors should have access to this information prior to the visit to enable sound judgements should a medical emergency arise. Team leaders should be comfortable with the administration of parental instructions when agreeing to accept young people as participants on a visit.
69. In addition to the above it may be necessary to include the following:
- Relationship of the person giving consent to the participant, where names differ.
  - Signature of the participant agreeing to appropriate rules and a code of conduct if applicable.
  - Whether the young person suffers from travel sickness.

- Permission for photographs of the participant to be used for display or publicity purpose

If a child is subject to a Care Order, foster parents will need to ensure that Social Services consents to any proposed trip. If a young person is a Ward of Court, the Head should seek advice from the court in relation to journeys and activities abroad well in advance of any proposed trip.

## 2.5 Briefing Meetings

70. Briefing meetings for parents and the young people can help to endorse this information in advance of the visit and are a good opportunity to establish Codes of Conduct. Supervisors who engage in educational visits are entitled to expect obedience to discipline, self-discipline, common sense and responsible behaviour (related to age and ability) from the young people in their care. Parents should be clearly informed of expectations on these matters and leaders should insist on the parents' full support and co-operation to achieve this.
71. **The briefing to the young people** should include:
- Aims and objectives of the visit/activity.
  - Relevance of the visit.
  - Who is responsible for the group
  - Appropriate background information
  - Relevant foreign culture and customs
  - How to avoid specific dangers and why they need to follow rules
  - What standards of behaviour are expected from the young people
  - Appropriate and inappropriate personal and social conduct including sexual activity
  - Rendezvous procedure and what to do if separated from the group or lost
  - Groupings for study or supervisory purposes
  - What to do if approached by anyone from outside the group
  - System of recall and action in emergencies
  - Emergency procedures.
72. **The briefing to the supervisors** should include reference to:
- Careful supervision to cover the time away
  - Anticipation of hazards
  - Standards of behaviour expected from the young people
  - Regular counting of their group
  - A list of names of people in the group and their sub groups
  - Emergency contacts.

When appropriate, the parents should be included in these briefings.

## **2.6 Pupil Codes of Conduct**

73. It is advisable to make absolutely clear to the young people the nature and purpose of the visit / journey.
74. To ensure that the party is well behaved, it is recommended that all young people are aware of the established Code of Conduct or negotiated ground rules. A contributory factor for many accidents has been lack of control which may be more difficult to maintain in an outdoor environment. It is important to stress that the responsibility for safety rests not only with the leaders but also with parents and the young people themselves.
75. The content of a Code of Conduct will vary between visits and journeys and between types of visit or journey. Team Leaders should therefore try to establish a set of Codes which can be applicable to all visits or journeys undertaken.
76. Should an accident occur where the Authority cannot be held responsible or liable (e.g. caused by young people with no fault attributed to the teacher, the Authority, or any party other than the young people) then parents may be held responsible and this should be made clear to organisers, team leaders and parents. Should a young person refuse to accept a Code of Conduct, either written or verbal, supervisors should have the right to refuse participation of that young person on the visit.
77. Team leaders should establish a code of conduct that might contain some of the following examples:
- Follow the instructions of the leader and other responsible adults.
  - Always be on time.
  - Meals will be served at set times.
  - Young people must at all times dress and behave with reasonable care, not take unnecessary risk and show consideration for others.
  - All activities must be supervised.
  - Young people will not be permitted to smoke or drink alcohol.
  - Bedrooms are out of bounds to members of the opposite gender.
  - Any damage to accommodation, fittings and furniture must be reported immediately. Accidental damage will not be a problem – damage caused deliberately or by foolish behaviour may need to be paid for by the parents of the individual(s) concerned.
  - Any loss of baggage, equipment, money, etc., must be reported to the party leader immediately.
  - Young people should be made aware that bullying will not be tolerated.

## **2.7 Financial Considerations**

78. When planning a visit current Council financial regulations should be complied with.

## Section 3. Category 'A' Visits

### 3.1 Introduction

79. The outdoors offers a variety of learning opportunities in different environments: rural and urban, local and more remote. It offers a wide range of activities and a focus on environmental issues. It is relevant in schools, youth work and continuing education. Its methods include skills focused learning, problem solving, team building, and self-reliant journeys and activities, with residential experience an especially valued feature.
80. Such excursions can often present greater risk than those in “wild areas” so it is advisable for the leader to have previously visited and explored the site. Many potential hazards such as roads, railways, canals, mine workings and disused buildings need present no risk provided young people are given appropriate instructions.
81. Before embarking on any visit, groups should be made fully aware of potential hazards and what to do in an emergency situation in that particular environment.
82. Regard should also be given to strangers, both individuals and groups that they may encounter, especially in areas that are unfamiliar. While no field trip is entirely free of risk, with sufficient thought and planning most can be foreseen and their potential risk minimised or negated.
83. Hygiene must have a high priority. If young people are to eat a packed lunch or food on site, provision must be made for washing (baby wipes are good for this). Sweets should not be consumed during the visit without similar precautions. Minor cuts and scratches should be cleaned and covered immediately.
84. Dog fouling leads to the possibility of toxocara. If fouling is suspected young people should be warned not to touch their mouth or eyes until they have cleansed their hands.
85. Consideration may need to be given to eye protection or other protective clothing. Any potential hazards should be identified by the leader prior to the trip so that suitable precautions can be adopted.
86. The young people should be encouraged to wash hands on a regular basis especially before consumption of food or drink. If soap and water are not readily available then dry anti-bacterial hand washes are advised.
87. No formal qualification is required to lead groups in urban, coastal or countryside environments below 600 metres and in summer conditions within 30 minutes of road or habitation. However, the Basic Expedition Leadership Award (BELA) is an

appropriate award that trains and assesses group leadership skills in this environment.

88. When leading visits it is important that the party leader is familiar with the general area in which the group will be working. The following will need to be considered:

- Road safety procedures - for instance, where there is no footpath, pedestrians should walk in single file, facing oncoming traffic and with a leader at the front and at least one responsible adult at the rear wearing bright clothing if appropriate;
- Appropriate group control including a system for recalling the group and emergency procedures;
- An emphasis on time keeping. Regular meeting places and times need to be identified. If possible choose a familiar, or, previously identified location;
- Appropriate footwear for the best and worst conditions likely to be encountered;
- A well-planned route bearing in mind rights of way and access;
- Unaccompanied working groups should at least be in pairs, threes are more preferable;
- Groups should be well briefed for the conditions and the expected standards of behaviour;

### 3.2 Countryside Visits

89. When visiting the countryside the “**Country Code**” should be followed at all times:

- Enjoy the countryside and respect its life and work
- Guard against all risk of fire
- Fasten all gates
- Keep your dogs under control
- Keep to public paths across farmland
- Use gates and stiles to cross fences, hedges and walls
- Leave livestock, crops and machinery alone
- Take your litter home
- Help to keep all water clean
- Protect wildlife, plants and trees
- Take special care on country roads
- Make no unnecessary noise.

90. It is important for leaders to ensure:

- Activities or fieldwork undertaken in river or lake environments require care and vigilant supervision. Swollen rivers are a particular hazard and leaders should be aware of the local characteristics of their potential study river and be well informed about weather forecasts prior to and during the visit. In the summer months, water may contain blue-green algae that can cause illness where

people have been in contact with contaminated water. The Environment Agency is able to supply up to date information.

- Flora and fauna present a potential risk to the unwary. Many plants contain toxins, often attractively packaged in the form of colourful berries. Young people should be warned that in no circumstances should they attempt to eat, or place in their mouth, any “finds”, unless specifically checked by a suitably qualified leader as an integral part of the trip. Problems can easily arise from ingestion of parasites through chewing grass. Vermin are likely to be present on many sites leading to risks such as Weils Disease, present in their urine. This can present a particular risk by water, especially during excessive dry periods, and should be taken into account when taking part in activities like pond dipping.
- Some plants may present a more direct threat. Giant hogweed for example may, if handled, cause burns by photosensitising the skin. Such seemingly perfect ‘blowpipe’ material should be pointed out to young people and the dangers explained. Others such as Rue can cause severe dermatological reactions while Monkshood is toxic on contact. An overlooked hazard may be presented by thorny plants.

### **3.3 Farm Visits**

91. Farm visits are an im
92. portant and beneficial way of introducing young people to rural life. Much can be learnt about the production of food and the well being of animals in our care. It is important to remember, however, that the farm is a workplace and plan accordingly.
93. Pupils will touch animals and areas accessed by animals. However micro-organisms commonly present in livestock animals may cause gastro-enteritis in humans. Farmers and visit organisers need to be aware that visitors will be more susceptible to infection in the farm environment and its products than those who live in that environment.
94. It is important that Party Leaders make sure that young people are aware of the hazards and that rules are obeyed. It is particularly important that the farm premises are not seen by young people as an ‘adventure playground’.
95. A pre-visit inspection of the farm is recommended. Particular attention should be paid to the provision of a designated eating area from which animals are excluded. Facilities for first aid and hand washing should also be checked.
96. A checklist to assist with this process has been prepared (CH4).
97. Supervision levels need to be carefully assessed bearing in mind not only the ages and numbers of the pupils but also the need for additional supervision particularly for hand washing and when in close proximity with animals.

### **General Health and Safety Advice**

98. Ensure that young people and the parents are advised:
- To dress appropriately and have adequate footwear, preferably Wellington boots;
  - Not to consume sweets, snacks or drinks during their tour;
  - Not to suck fingers or put hands, pencils, pens or crayons into mouths;
  - To keep their fingers out of their mouths and to thoroughly wash their hands before eating or drinking and before leaving the farm;
  - Not to drink from farm taps;
  - Not to kiss animals;
  - Not to sample, taste or take away any animal feedstuff, raw milk, etc;
  - Treat cuts and grazes on the hands with waterproof dressings.
99. The following are particularly hazardous to young people without due care and attention:
- There is a small risk of Lyme disease from sheepticks
  - Slurry lagoons are prohibited areas.
  - Water, streams and ditches, ponds and sheep dipping baths.
  - Stacks of bales and other materials, storage areas and tanks for feeding stuffs and fertilisers, and silos are also prohibited areas unless supervised.
  - Seeds may well have been treated with fungicide or pesticide and may require protective clothing before handling. (This is also true of certain shop-bought seed used in the school garden).
  - Livestock are potentially dangerous especially the males. Viewing and holding should be undertaken only with close supervision.
  - Attention should be paid particularly to the dangers of machinery, mechanised tools such as chain saws and stationary machinery. Though not in use they may present a problem due to pesticide residues, while diesel fuel can cause dermatological problems, especially on young skin.
  - Young people and accompanying adults should be made aware of the range of flammable material on farm sites and the associated risk of fire.
  - Parents should be advised that should a child become ill after a farm visit the doctor should be made aware that the child has had recent contact with farm animals.
46. Although the above guidelines have been written with farms in mind, the general principles should be followed when visiting other similar establishments like Zoos and Wildlife Parks.

### 3.4. Beach and Coastal Visits

47. This type of Category 'A' visit refers only to activities where pupils **do not go into or onto water**. Where it is intended that pupils do go into or onto the water the visit **must** be treated as a Category 'B' visit.
48. The beach and coastal areas offer a wide range of opportunities for both study and activity. A high level of vigilance and supervision is needed for any water environment but the sea needs extra care and attention. When planning activities in coastal areas leaders should be aware of particular hazards:
- Tide, swell, wind, currents and sandbanks all present difficulties. Exit routes must be checked well in advance and at all times during the activity.
  - The use of inflatable rafts or dinghies should not be allowed.
  - Beaches are especially hazardous when large numbers of the general public are present. Establish a base and pay attention to flags and notices.
  - Be aware of debris, glass, syringes, sewerage or netting.
  - Digging in the sand in cliffs or dunes could cause cave-ins.
  - Climbing on rocky beaches and cliffs should be discouraged unless led by a suitably experienced leader. Loose rocks are a potential hazard, do not work or base groups under such sites and do not allow young people to knock down or throw stones.
  - A covering of weed may make rocks very slippery and can hide potential hazards.
  - Cliff tops can be very exposed. Route planning and supervision must reflect the route being followed. Keep away from edges both above and below the cliffs.

### 3.5 Sponsored and other Group walks

49. There are particular and significant hazards involved when undertaking sponsored walks on roads. It may be worth considering alternative routes or means of achieving the same objectives, such as a non-road environment.
50. Organisers should note the following:
- Contact the police by letter specifying date, time, route to be followed and any other relevant details
  - Ensure the route follows rights of way
  - Make contact with farmers and landowners along the route
  - Ensure there are sufficient marshals available
  - Ensure that the route is thoroughly way-marked
  - Make allowance for bad weather on the day.
  - Ensure that all vehicles are kept off public paths and farmland unless a prior arrangement has been made
  - Ensure that there will be a "back-marker" for damage, litter and unfastened gates
  - Establish first aid stations and make sure that participants are aware of their location.
  - Follow the Country Code (above)

## Section 4. Category 'B' Visits

51. Challenge and adventure are central to outdoor and adventurous pursuits and through successfully facing up to challenges, overcoming fears and apprehensions along the way, young people build confidence and self esteem with implications for all aspects of their development.
52. It is important that leaders of activities are experienced and qualified with sufficient competence to guide young people progressively through the chosen activities to achieve their aims. A casual approach to adventurous outdoor activities should under no circumstances be encouraged. The nature of many of the activities is such that ill-prepared and ill-equipped participants are taking risks that could result at least in discomfort, but possibly in disaster.
53. Personal experience and qualities of leadership, judgement, anticipation and control on the part of Group Leaders are vital in helping to ensure the safety of the young people in their care.
54. Minimum ratios of leaders to group members are essential for adequate supervision for all educational visits. However, activities in Category B have recommended ratios. Suitably qualified instructors are trained to recognise when circumstances allow these guidelines to be safely exceeded or when lower limits may apply. Advice from the Outdoor Education Advisor should be sought in these circumstances.
55. Most visits will be taking young people into areas that they are ill-prepared to cope with. Safety is concerned with the overall well being of individuals, so it is important to have a clear idea of what you want to do, plan within the leader's competence and capabilities and in the environment that fits in with the clearly identified purpose of the visit. It is also important to remember that the responsibility for safety rests not only with the Leaders, but also with the young people themselves.
56. Category 'B' visits include but are not limited to the following activities:
  - Camping
  - Canoeing
  - Cave and Mine exploration
  - Climbing, including Gorge Walking and Sea Level Traversing
  - Cycling and Off-Road Biking
  - Duke of Edinburgh Award
  - Land Yachting
  - Trekking
  - Open Water Swimming
  - Orienteering
  - Sailing
  - Skiing
  - Surfing

57. For Schools licensed to offer DofE Expedition work additional policy, procedure and guidance has been produced by Solihull DofE Office.

## **Section 5. Visits Abroad**

58. Travelling abroad can be hugely rewarding for young people and adults alike but success of any venture is linked closely with the planning and preparation as advocated in the earlier advice in these guidelines. Previous sections of this document contain relevant guidance, however when planning visits abroad there are additional factors that need to be considered. These factors are highlighted in the following section. Team Leaders must comply with these guidelines when planning and conducting visits abroad.

### **5.1 Approval**

59. All Team Leaders planning visits abroad must first gain approval from the Head and the School's Governing Body. Further approval from the Local Authority is also required.
60. Planning visits abroad can be expensive. Approval should be obtained at least one year prior to any visits taking place i.e. before financial commitments have been made.

### **5.2 Organising your own visit**

61. Team leaders may decide to organise a visit abroad without the help of an outside body. Where this visit falls within the definition of a package then organisers have responsibilities under Directive 90/314/EEC. This is implemented in the UK by the Package Travel, Package Holidays and Package Tours Regulations 1992 (The Package Travel Regulations).

These regulations apply to packages sold or offered for sale in the UK. They define a package as a combination of any two of: accommodation, transport or other tourist services not ancillary to transport. Most package arrangements come within the scope of the regulations unless they are "occasional" or part of an educational course programme as compared with a leisure activity such as skiing. At the present time, the legal position of packages arranged as part of an educational course is subject to the effects of a future judgement in the European Court of Justice. Heads should be aware of these regulations in case they are in scope.

### **5.3 Sources of information and advice for Visits Abroad**

62. Ideally an exploratory visit to the location should always be made. If this is not possible, it is important to gather as much information as possible from:
- the provider
  - the Foreign and Commonwealth Office's Travel Advice Unit
  - other schools who have used the facilities / been to the area
  - national travel offices in the UK
  - embassies/consulates
  - travel agents / tour operators
  - the Suzy Lamplugh Trust, a national charity for personal safety, who have produced guidance, including a book called *World Wise: Your Passport to Safer Travel*, a video of the same title and information on the Internet
  - the Internet, books and magazines
  - See Section 9 for additional sources of information and advice for visits abroad

### **5.4 Organising your own Transport**

63. Team Leaders should ensure that authorised drivers taking groups abroad are familiar with the current legislation in respect of driving a coach or minibus in the countries being visited and those en route.
64. DETR can provide information on legal requirements for driving abroad. Some factors to consider include:
- Different legislation and regulations may apply for drivers' hours and record keeping purposes, particularly in non-EU countries
  - EU drivers' hours and tachograph regulations normally apply to any vehicle with 9 or more passenger seats on journeys through EU countries and some countries outside the EU. In other countries, drivers must observe the domestic rules of the countries being visited. Advice on domestic rules may be obtained from the relevant embassies of the countries concerned. See also *Taking a Minibus Abroad* (DETR)
  - Special documentation is required for minibuses taken abroad
  - All group members should be aware of unfamiliar right-hand drive traffic. The passenger doors on UK minibuses and coaches may not open on the kerb side in countries where travel is on the right-hand side of the road. Extra care will be necessary when the group is climbing in and out of the vehicle. Detours may be necessary to ensure safety
  - Carrying capacity and loading requirements

### **5.5 Organising Adventure Activities Abroad**

65. Team leaders must ensure standards of provision are the same as the guidelines laid out in this Guidance Document. They should ask to see the relevant qualifications of the provider and consult the relevant contact officer for that activity if appropriate.

## 5.6 Tour Operators

66. There are seven bonding bodies approved by the Department of Trade and Industry:
- Association of British Travel Agents (ABTA)
  - Federation of Tour Operators Trust (FTO-O)
  - Association of Independent Tour Operators Trust (AITOT)
  - Passenger Shipping Association (PSA)
  - The Confederation of Passenger Transport (CPI)
  - Yacht Charter Association (YCA)
  - The Association of Bonded Travel Organisers Trust (ABTOT)
67. Sources of further advice for school travel abroad are:
- The Department of Trade and Industry – for the regulations governing tour operators
  - The Schools and Group Travel Association (SAGTA) is an independent association with a members' code of good conduct and safety rules. All its members are in ABTA
  - Alternatively, there are voluntary bodies established to promote school journeys, such as the School Journey Association
  - Team Leaders who decide to arrange travel independently may also seek the advice and help of the Foreign and Commonwealth Office's (FCO) Travel Advice Unit. The Unit's purpose is to help individuals and groups to avoid trouble abroad. It can provide information on threats to personal safety arising from political unrest, lawlessness, violence etc.
68. Before using a tour operator Team Leaders should ensure it is reputable. The following points should be considered in this process. Ensure that:
- Company is experienced in organising similar visits;
  - Company keeps safety records and makes them accessible;
  - Other schools have used the company and will recommend them;
  - They have local agents in the country to be visited that speak the language and are experienced in local customs and culture;
  - The company is bonded.
69. A travel agent does not need to be an ATOL holder if acting only as an agent of an ATOL holder. But, if so, the Team Leader must check whether or not the whole package being supplied is covered by the ATOL. If it is not, the Team Leader will need to provide evidence of other forms of security to provide for the refund of advance payments and the costs of repatriation in the event of insolvency. The Civil Aviation Authority licences travel organisers and tour operators selling air seats or packages with an air transport element (Air Travel Organisers Licence or ATOL). The licence is a legal requirement and provides security against a licence holder going out of business.

## 5.7 Operators Based Abroad

Directive 90/314/EEC applies to all states of the European Economic Area (EEA). Party Leaders may wish to use a package organiser based abroad in an EEA state. If so, they should check that it satisfies the requirements of the national legislation implementing the Directive. Details may be available from national tourist offices or Embassies/Consulates.

## 5.8 Preparing Young People for Visits Abroad

70. Team leaders need to ensure that there are appropriate procedures in place in the event of a member of the group becoming ill. Many of the health problems of young people on longer visits are caused by lack of food, liquid or sleep. However, team leaders should be aware of the likely health issues which could arise in the countries being visited and consider the actions they may need to take.
71. These issues should be taken into account at the planning stage and measures taken to prevent these risks. If appropriate, parents should be asked to provide suitably factored sun protection creams and sun hats/glasses. Group members should be advised about the dangers of over-exertion in the heat and of dehydration, which can cause headache, dizziness and nausea. In warm climates it is important to keep fluid levels high, take extra salt and wear loose, lightweight clothing – preferably made of cotton or other natural fibres.
72. The preparation of a fact sheet for participants and parents would be useful. Extra factors to consider for visits abroad include:
  - Particular security issues relevant to the accommodation and countries being visited
  - Language – particularly common phrases
  - Culture, e.g. body language, rules and regulations of behaviour, dress codes, local customs, attitudes to gender etc
  - Drugs, alcohol-usage
  - Food and drink – group members should be warned of the dangers of drinking tap water in certain countries. In some countries it is safer to drink bottled water, and care needs to be taken with raw vegetables, salads and fruit, raw shellfish, underdone meat or fish
  - Money – how to carry money and valuables discreetly, e.g. money belts, zip armllets. If larger amounts of money will be needed, it is advisable to take travellers' cheques
  - How to use phones abroad, money required (a BT Connect card allows calls to be charged to the home number) and the code for phoning home
  - What to do in an emergency

### **5.9 Briefing Meeting for Parents**

73. It is particularly important that parents are given the opportunity to meet the Team Leader and supervisors who will be taking the group overseas. (Section 2.5 Briefing Meetings).
74. In some countries it may be impossible to ensure compliance with UK/EEC and L.A. guidelines such as transport and fire regulations. These important issues must be raised with parents prior to consent and team leaders should have policies based on sound risk assessments to show what procedures are in place to minimise risk.

### **5.10 Vaccinations**

75. The Team Leader should ensure that all members of the group have been immunised in good time and are in possession of proof of vaccination. The Department of Health gives advice on vaccination requirements in their publication, *Health Advice to Travellers Anywhere in the World*.

### **5.11 Insurance**

76. The Team Leader must ensure that the group has appropriate insurance. (See Policy document, Section 3.8.)

### **5.12 Foreign Legislation**

77. The Team Leader needs to be aware of relevant legislation, particularly on matters pertaining to health and safety, e.g. fire regulations.

### **5.13 Passports / Visas**

78. The Team Leader should ensure that all members of the group have valid passports and visas (if appropriate) in the early stages of planning the trip. Some countries insist on a sufficient length of validity with 6 to 12 months left before renewal on passports.
79. Foreign, Commonwealth and Irish Citizens should obtain passports from their own authorities. It is very important for Team Leaders to check whether such passport holders still need a personal visa in order to enter the countries being visited. Young people who are not nationals of any EU member state may need a visa to travel from the UK to another member state. However, they may receive visa exemption if they are members of a school group. Details and forms are available from the Central Bureau for Educational Visits and Exchanges.
80. Young people other than EU nationals may require a separate passport and may need to use separate passport control channels from the rest of the group. These may need accompanying.

81. It is advisable that Team Leaders hold and secure all passports during the visit.
82. For further details contact the Passport Office, National HQ, telephone 08705 210410, or Local Office, Peterborough, telephone (01733) 555688 Ext. 282.

#### **5.14 Emergency Medical Facilities**

83. Some of these are available through reciprocal health care arrangements in European Community (EC) countries to EU Nationals. Paper E111 certificates have been replaced with medical entitlement card E111 which will provide free or reduced cost treatment throughout the EC. It is available from Post Offices or Free Phone 0800 555777. It is highly recommended that Team Leaders ensure that each group member has a valid E111 card.

Note: It is advisable to arrange a contingency as sometimes treatment must be paid for in advance and the money claimed back later.

#### **5.15 Paperwork**

84. The Team Leader should ensure that the following information is readily available:
  - The Itinerary
  - All consent information (see Section 2.4)
  - Vaccination certificates
  - All emergency contact(s) information including L.A. contact information (see Policy: Section 3.7 )
  - Travel tickets, passports and visas. (It is advisable to carry separate photocopies of all these in a sealed waterproof bag).
  - A copy of the contract with the centre / hotel / company etc, if appropriate
  - Details of insurance arrangements (and a copy of) and the company's telephone number
  - The name, address and telephone number of the group's accommodation(s)
  - Location of local hospital / medical services
  - Valid E111 cards for party members.
85. Copies should be retained with:
  - The school
  - All designated Emergency Contacts
  - The L.A. through the designated Officer
86. The Team Leader may wish to ask parents for extra passport size photographs of the young people. It might be useful to have photographs of the supervisors in the group as well.
87. It is also advised that another Leader retains a duplicate set of all the documentation separately in case the originals are lost.

### **5.16 During the visit**

88. It is advisable for the young people to carry a note in the relevant foreign language for use if they get lost, asking the reader to re-unite them with the group at the accommodation / meeting point, or to take them to a police station. They should also carry the contact details of the party leader's and emergency contact.
89. All group members should carry an appropriate amount of foreign currency at all times, e.g. money for telephone (or a phone card).
90. It is important to be able to identify group members easily, e.g. uniform, brightly coloured backpack, cap or item of clothing, badges. However, no young person should display their name clearly on their clothing – this could result in their being isolated from the group by an apparently friendly, personal call. Personalised football shirts should be avoided for this reason.

### **5.17 Emergencies**

91. It is essential to have a contact at home with a valid passport, who in the event of an emergency, could go to the area being visited to provide support to the group.
92. The Team Leader must ensure that all members of the group know what action to take should a problem arise.
93. The Team Leader and supervisors should know where the nearest British Embassy or Consulate is located and the telephone number. In some circumstances it may be advisable for all members of the group to carry this information.

### **5.18 Travel by air**

94. Taking a group on an aircraft requires careful planning and preparation. The airline / travel agent will be able to give advice on particular requirements. If the group includes any members with disabilities, it is advisable to check that the airline has a wheelchair service and lifting facility etc.
95. The Team Leader should resist any attempt by the airline to split the group between different aircraft.
96. The possibility of excess baggage and baggage regulations will need to be considered depending upon countries visited.

### **5.19 Exchange visits**

97. The success of an exchange visit largely depends on good relationships and communications with the partner to be visited.

98. Individual exchanges differ from other visits abroad in that the young people will spend most of their time with host families and are, therefore, not always under the direct supervision of their staff. Host families will not be subject to English law.
99. Young people must be aware of the ground rules agreed between the party leader and the host family. Many of the considerations, which apply to residential and day trips, also apply here. In addition, the Team Leader should ensure the following:
- A good personal knowledge of the host and counterpart
  - Satisfactory 'pairing' arrangements and an interchange of information relating to special, medical or dietary needs.
  - Age and gender matches should be appropriate parents, young people and the host should be clear about the arrangements for collecting and the distribution of the young people to their host families, and for transporting them throughout the visit
  - The Head teacher and all Emergency Contacts should retain a list of all the host family names, addresses and contact numbers
  - Young people living with host families should have easy access to their supervisors, usually by telephone
  - Parents should be made aware that their children living with host families will not always be under direct supervision by the leader

## **5.20 Vetting host families**

100. Exchange or home stay visits can be arranged through Agencies, in which case the Agency should have some responsibility for vetting the host families. Group leaders making their own arrangements need to be clear about procedures in the relevant country for vetting the suitability of host families, including criminal background checks insofar as these are available.
101. If the host school or placing agency does not have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of the young people involved in an exchange, the Team Leader should seek further assurances and / or reconsider whether the visit should take place.

## **5.21 Overseas Expeditions**

102. 'Overseas Expeditions' typically take place in remote areas of the world and / or in developing countries, both of which present significant hazards and organisational challenges not encountered in the UK or Europe. They are of great value, indeed the experience of a lifetime. It is important that we challenge and not over protect those for whom we are responsible. However, in order to do this effectively, we must properly assess, prepare for and manage the risks involved.

## 6. Recommended practice during Educational Visits

103. All the information in these guidance notes are designed to allow leaders to make appropriate decisions up to and during a visit. Other factors will become apparent as the visit unfolds and leaders must respond to these.

The following also needs consideration:

- a) Once at the destination, Team Leaders should take steps to inform the members of the party of any particular hazards that may be present, i.e. proximity of rivers, cliffs, public access and instruct the young people as appropriate.
  - b) On arrival at the accommodation, Team Leaders should determine who is responsible for security. It is good practice to ensure that entrances and exits are secured appropriately at night and at times of occupation as required and that the young people in their care respond positively to any security arrangements that may be in force. It is also essential to check the location of fire exits and to ensure that the occupants of each room know the route to their nearest exit. Attention should be drawn to the position of fire alarms and the method of raising the alarm.
  - c) Supervisors should note the type and the position of portable fire fighting equipment and the fire routine in operation. An assembly point should be established outside where a roll call can be taken prior to informing the Fire Brigade or Centre Management that the party is accounted for.
  - d) Accompanying adults should be aware of their responsibility for the members of the party at all times during the day and night. When any young person remains at the base for whatever reason an appropriate level of supervision must always be present.
  - e) Any previous undertaking that has been given to inform parents of the safe arrival of the party should be implemented at the first opportunity.
  - f) A register of room numbers and their occupants should always be compiled immediately and copies circulated to all supervisors.
  - g) Team Leaders should decide whether room keys are to be used.
  - h) Appropriate emergency first aid equipment should be reasonably accessible and arrangements for first aid and medical treatment should be known to all the young people. It is advisable to make a note of any minor ailments and treatments administered.
  - i) Pocket money is best entrusted to the safe keeping of an accompanying adult who should keep adequate records. The money can then be distributed periodically to pupils. A supply of loose change will be useful.
104. The standard of care exercised by each adult responsible for the supervision of educational visits should be that of caring and responsible parents (see Policy: Section 1.2).

## **7. Recommended practice following Educational Visits**

105. The Team Leader should inform parents of any minor injury / illness sustained by a young person. If a serious injury has been sustained, the parents will have been informed at the time under the 'Emergency Procedures' arrangements (Policy: Section 3.7). Depending upon the success of the visit it might be necessary or important to arrange a complete debrief for young people and their parents. It is important that a leader remains until all the young people have been collected by parents or carers. It is vital that the party leader informs the emergency contact(s) of their safe return as soon as possible.
106. The Team Leader should complete the **Educational Visit Evaluation Form 'E'** and submit it to the Educational Visits Co-ordinator.
107. The Team Leader should prepare a financial account of the visit / journey showing expenditure in detail. The accounts should be given to the Head teacher and audited. In appropriate cases this should be undertaken in conjunction with the second member of staff as soon as possible after the visit.

### **7.1 Reporting of Accidents**

108. Important lessons can be learnt from accidents, incidents and near misses and these should be shared. The Team Leader should forward reports of such incidents to the appropriate EVC who must follow the corporate accident procedure.
109. All accidents and near misses that occur during activities must be reported to the EVC, the Head Teacher and the Authority's Corporate Health and Safety Team. (The purpose of reporting of near misses is to record any relevant information that would prevent a future incident/accident occurring.)

## **8. Residential Accommodation**

### **8.1 Hostels and Hotels**

110. When booking Hostels and Hotels, the group should have adjoining rooms with staff accommodation adjacent to the young people. Access by the staff to the young people's rooms must be available at all times. The accommodation area should be as discrete to the group as possible and where there is not 24-hour reception staff, security arrangements should be in force to deter unauthorised visitors. These matters should be checked during a pre-visit at which time other basic security checks can be made such as ensuring there are working locks on windows and shutters, the location of fire escapes and building evacuation plan. The leader should obtain a floor plan of the rooms designated to the group in advance. Leaders will have the responsibility to ensure that the appropriate security arrangements are in place every evening.

## 8.2 Outdoor Centres

111. Schools may choose to arrange adventure or residential courses at Centres run by commercial, charitable or independent providers. External providers also include “freelance” instructors engaged to deliver particular adventurous activities and tour operators from whom a package, including the provision of adventurous activities is purchased, e.g. ski tour operators. It may not be feasible for the Authority to approve each commercial, charitable or private facility on a regular or systematic basis. Advice should be sought if necessary. If Team Leaders decide to use a commercial provider it is important to:
- Ensure the standard of service offered conforms to the guidance given in this document;
  - Monitor and review all aspects of the provision at all stages of the visit;
  - Make a preliminary visit if feasible and / or seek information from a previous user of the provider. Does the Centre provide the right service, taking into account the age, abilities and needs of your particular group?
  - Make a risk assessment of the centre using the proforma provided.
112. Most commercial and independent adventure activity centres place great emphasis on safety for the people in their care. However, unless they provide activities as defined in the Adventure Activities Licensing Regulations 1996, such centres are currently subject to few external controls. If they provide activities within the Licensing Regulations then they must by law, hold a Licence for all the activities that they undertake. **Any provider encompassed within The Activity Centres (Young Person’s Safety) Act 1995, who does not hold a current Licence, must not, in any circumstances, be used for activity provision.**
113. The Department for Education and Employment issued a Circular 22/94 entitled “*Safety in Outdoor Education Centres: Guidance*” may address some concerns. The Activity Centre Advisory Committee (ACAC) Code of Practice may also be useful.
114. The checklist found in Section 10 may be used when making enquiries into the nature and quality of provision that a Centre might claim to offer.

## 9. Transport

115. The information in this section contains good practice for the planning and use of Transport. Team Leaders should ensure that these procedures and guidelines are followed on every occasion when transport is provided by the school. They should also ensure that notification of the mode of transport is provided as part of the visit consent procedure.
116. When planning journeys it is important to consider:
- Suitability of vehicle
  - Use of school minibuses
  - Suitability of the minibus driver

- Supervision and passenger safety
- Use of mobile phones
- Use of private cars
- Breakdown procedure
- Accident procedure
- Procedure for the end of the journey
- Taking minibuses abroad

### **9.1 Suitability of Vehicle**

117. When using a coach or minibus for transportation it is important to ensure that the vehicle is:
- Suitable in terms of design, capability and comfort
  - In a roadworthy condition
  - Driven by sufficiently qualified drivers to cover the length of the journey
  - Fitted with seat belts
118. These requirements are most easily met by using an approved coach or minibus operator. The guarantees, which apply to “Approved” operators, do not necessarily extend to other operators to whom they sub-contract. This should be taken into account when dealing with Approved operators.
119. All vehicles used must comply with Road Traffic Acts and Regulations.

### **9.2 Use of School Minibuses**

120. All “School” minibuses must be in a serviceable condition and should be maintained in accordance with the manufacturer’s recommendations by a recognised garage.
121. A clear procedure must be in place to ensure any school minibus is regularly serviced and maintained in accordance with a set schedule: this is in addition to the driver’s pre-journey checks. The schedule must include MOT Tests and not exceed the manufacturer’s recommended service intervals.
122. Any fault that affects the safe operation of the vehicle or the safety of the users should be recorded and the vehicle not used until the problem has been rectified. A nil-reporting procedure, which requires the driver to record the results of the check even if there are no faults, is recommended.
123. There are three ways of carrying luggage or equipment in a minibus: inside, on the roof or in / on a trailer. However carried, it should be securely stored, evenly distributed and the Gross Vehicle Weight (specified in the vehicle handbook) must not be exceeded by the combined weight of passengers and equipment.
124. Luggage inside should be secured so as not to cause a problem during an emergency stop. It must not obstruct access to any of the doors, aisles or seats.

Roof racks may be preferable for bulky items or large amounts of luggage but they must be loaded correctly and well secured.

125. Drivers must be aware of the maximum weight capability of the roof rack so as not to interfere with the stability and safety of the vehicle. A roof rack will affect the handling of the vehicle.

### **9.3 Trailers**

126. When towing trailers lower speed limits apply: 50mph for single carriageway roads and 60mph for dual carriageway and motorways. Minibuses with trailers are prohibited from using the outside (3<sup>rd</sup>) lane on motorways.
127. A trailer must not be used on any minibus with rear facing doors which is carrying passengers, unless there is an alternative door.

### **9.4 Minibus Permits**

128. Permits allow certain organisations to make a charge without having to comply with the full public service vehicle operator licensing requirements and without the need for their drivers to have PCV (category D1 or D) entitlement. The services must be provided for their own members or for groups of people whom the organisation serves. The service must not be provided to members of the general public and the charges made must be on a non-profit basis.
129. Under the Transport Act 1985, Solihull Metropolitan Borough Council is a designated body empowered to issue permits for the use of minibuses for “hire or reward.” “Schools” can apply for a permit that allows charges to be levied and exempts the driver from holding a public service vehicle (PSV) licence. A Permit is required for each minibus in a school and is not transferable with other organisations. (Section 19 permits cannot be used abroad).
130. Drivers who first held a licence to drive cars prior to 1 January 1997 will continue to be able to drive minibuses under the Permit Schemes provided their entitlement to drive minibuses (category D1 – not for hire or reward) remains in force.

The law on driver licensing no longer permits drivers who passed their test after the 1 January 1997 to drive mini buses without passing a Passenger Carrying Vehicle (PCV) driving test unless they are driving under a section 19 permit. Drivers of any vehicle must ensure they have the correct entitlement on their licence.

### **9.5 Suitability of the Minibus Driver**

131. The ongoing responsibility for the school minibus rests with the Head teacher / Governors. The driver is responsible for the vehicle during the journey, problems will affect their personal licence entitlement and they should be satisfied that the vehicle

is in a serviceable condition before accepting this responsibility. Drivers should check the vehicle log to ensure that there are no outstanding repairs. Drivers must also make routine checks before each journey.

132. To comply with the Authority's Insurance requirements drivers must:
- Have a valid and current driving licence
  - Be aged between 21 and 65 years of age
  - Notify a change of licence detail or endorsement, any disqualification or changes in individuals health to the EVC
  - Be declared fit to drive
  - Have successfully undertaken driver instruction and competency testing by Solihull Council.

**Drivers must also:**

- Be aware of the Authority's guidance and procedures
- Avoid driving when taking medication or undergoing treatment which might affect ability or judgement
- Be familiar with emergency procedures
- Know the location of fire fighting and first aid equipment if appropriate
- Avoid driving for prolonged periods and ensure adequate rests
- Consider the activity of the day and the effect that might have on ability to drive safely
- Be medically fit to drive
- Not use a mobile phone in the vehicle
- Conduct a pre-drive vehicle safety check
- Be fit and able to drive
- Ensure that all passengers have a seat and a seat belt
- Stow all luggage and equipment safely
- Ensure that the doors are closed but not locked before moving off
- Keep aisles and exits clear

## **9.6 Supervision and Passenger Safety**

133. On all visits or journeys which entail transporting young people adequate supervision is essential for the duration of that journey. **No driver should be responsible for supervision during a journey.** The specific supervision requirements will depend upon the duration, the number and age of the young people and the means of transport used.

Factors to consider include:

- Young people being aware of safety rules and expected standards of behaviour during the journey.
- Supervision level necessary for double-decker buses / coaches / minibuses.
- Safety when crossing roads as part of the journey.
- Safety on buses, trains, ferries and boats. A code of conduct regarding movement during the journey should be agreed.

- There must be sufficient seats for the number of passengers.
- Safety of groups while waiting to board and leaving designated pick-up and drop-off points. Young people should not be left alone at drop-off points.
- Safety of the group in event of a breakdown and the need for direct supervision if this occurs.
- Head counts, especially when the group is getting off or on transport.
- Wearing of seat belts.
- Restricting access to the driver by passengers.
- Travel sickness.
- Careful loading of luggage and equipment so as not to block aisles and exits.
- Care when parking to ensure groups do not exit a vehicle into traffic.

### 9.7 Use of Mobile Phones

134. Mobile phones are of use for emergency procedures and contact between groups using several vehicles. They should not be the only strategy in determining emergency or movement procedures. **Drivers must never use a Mobile phone while driving.**

### 9.8 Use of Private Cars

135. Leaders or volunteers who help transport young people in their own cars must be aware of their legal responsibility for the safety of the young people in their care. Parental consent should be sought for children to be carried in other supervisors / parents' cars and it is advisable for the driver to ensure that more than one young person is carried at a time. The Team Leader should organise a central dropping point rather than home drops.

Supervisors who drive young people in their own car must ensure the safety of passengers, making sure that seat belts are fitted/worn and also that:

- Vehicles are roadworthy.
- They have appropriate licence and insurance cover.
- They have been vetted and approved to do so.

### 9.9 Breakdown Procedures

136. Regular vehicle checks and maintenance will reduce the likelihood of a vehicle breaking down but a breakdown procedure should form part of your emergency planning. If you are using outside provision while they are responsible for your safety, your duty of care is not reduced.

137. In the event of a breakdown:

- Move the vehicle off the main carriageway or onto the hard shoulder on a motorway. Switch on the hazard warning lights. If a warning triangle is used it

should be 45 metres from the minibus facing oncoming traffic. **Do not use a triangle on a motorway.**

- The Team Leader will need to assess the situation and decide whether or not to unload the group. In some cases it may be more dangerous to unload passengers e.g. if there is not a safe waiting area. All should remain in their seats until the leader has made a decision.
- Passengers should be kept together and kept under constant supervision.
- If appropriate, passengers should be moved out of the nearside of the vehicle and as far away from it and other traffic as possible.
- On motorways or other busy roads, if appropriate, passengers should be taken onto the embankment or grass margin and as far from the traffic as practicable. The hard shoulder on a motorway is very dangerous.
- On a motorway emergency services expect drivers to use the roadside emergency telephones, rather than mobile phones as this will enable them to pinpoint the exact location and be aware of your presence.
- The leader should consider the need to contact the nominated person depending upon the delay period/severity of the situation.

### 9.10 Accident Procedure

138. The accident and emergency procedures for the visit must be in place and should include reference to procedures for accidents occurring during the journey. All supervisors and drivers must be made aware of their role in these procedures.

- Stay calm / don't lose your temper. Don't admit blame at the scene of the accident or offer any form of settlement.
- Stop at the scene if you think your accident has caused injuries or damage to vehicles or property. **It is an offence not to stop.**
- If your vehicle hits a dog or farm animal, you are required by law to report the incident to the police. If you hit a cat or wild animal, there is no obligation to report it, but you must ensure that the animal is not injured or suffering.
- Ensure the scene is safe. Switch off all engines. Turn on hazard warning lights and alert oncoming traffic about the accident.
- Call 999 (or 112 from a mobile) immediately if:
  - i. Anyone involved in the accident is injured,
  - ii. The collision has caused a hazardous situation, or
  - iii. Someone leaves the scene without exchanging details.
- If you are unsure about whether to call the police – make the call. (The police do not usually attend road traffic accidents unless there are injuries).
- Always carry an accident pack in the vehicle (notebook, pen, disposable camera / mobile phone capable of taking pictures) In the event of an accident, make a sketch at the scene, noting as many details as you can (street names, vehicle locations and direction of travel, skid marks, collision points and vehicle damage) Use the camera to record images of the road layout, position of vehicles / damage to vehicles.
- Record:

- Names, addresses and vehicle registrations of any witnesses (including passengers in the other vehicles involved).
- Registration number, make, model and colour of all other vehicles involved in the accident. All drivers involved must exchange details by law. (Name, address, home and mobile telephone numbers, insurance details). You must also provide this information about yourself.
- Any other details you think may be important e.g. Was the other driver using a mobile phone / under the influence of alcohol? Weather conditions?
- You **must** notify your insurance company immediately of any collision you are involved in, regardless of whether or not a claim is to be made or whose fault it was. Provide them with all of the details – notes, photographs etc.

**In addition, the Team Leader should:**

- Consider the dangers of moving injured passengers unless they are in immediate danger of further injury from other vehicles or from fire or explosion;
- Account for and ensure complete supervision of the group at all times;
- Ensure that the driver stays at the scene of the accident until excused by the Emergency Services;
- If the accident is “damage only” and no one is injured, ensuring that the vehicle is roadworthy before continuing with the journey;
- The need to note the names of people involved and to report the accident to the Police as soon as possible and within 24 hours.

**9.11 Procedures for the end of the journey**

139. Clear procedures must be in place for the end of a journey
- Approach each stop slowly and with care;
  - Always park so that passengers step on to the footway and not onto the road. (This may require a detour);
  - Ensure the young people are supervised when leaving the vehicle especially through rear access doors;
  - Never allow young people to leave the vehicle until it is at a complete standstill, safely parked and handbrake on;
  - Use hazard-warning lights when young people are boarding or leaving the vehicle;
  - Do not leave young people unsupervised in vehicles;
  - Avoid unnecessary reversing especially if young people are nearby. If unavoidable seek assistance from a supervisor who should be positioned so that they can be clearly seen.
140. Drivers should conduct a post-trip vehicle check inside and outside of the minibus and record any visual damage or faults, any emergency equipment used and any incidents that have occurred during the journey.

## 9.12 Taking Minibuses Abroad

141. There are significant driver licensing difficulties for trips abroad in minibuses. A decision to go ahead with a trip should not be taken until the body responsible for the trip has assessed all the legal and safety risks and make arrangements accordingly.
142. Driving licence requirements and laws about drivers' hours vary in countries outside the EU. Regulations differ in what emergency equipment must be carried. It is advisable to consult with the main motoring UK organisations or the countries Embassy for further advice.
143. "Section 19 (Small bus)" permits are not valid outside the UK. Drivers must hold a PCV licence where the trip is for "hire or reward".
144. Leaders must ensure that all necessary documentation is carried. Requirements may vary according to the country/countries being visited and further advice should always be obtained. Full details of the document can be found in "Taking a Minibus to Europe" produced by the Community Transport Association (See Section 13 – Useful Addresses).
145. A tachograph must be fitted, should a bus carry more than 9 but less than 17 and drivers trained in their use. Misuse could lead to spot fines or prosecution. Driver's hours must be followed from the start of the journey in the UK.
146. Headlights must either be adjusted or have taped triangles so as not to dazzle other road users.
147. A warning triangle must be carried for use in the event of a breakdown or accident and the vehicle should carry a complete set of replacement bulbs. In some countries snow chains are a legal requirement in winter, but note that requirements vary from country to country.
148. Drivers need to be very aware when driving UK minibuses abroad that the exit doors will be on the wrong side. Detours may be necessary to ensure exit is onto the pavement side. This is especially important to consider in the event of a breakdown or incident.

## **SECTION 10**

# **CHECKLISTS**

## RISK ASSESSMENT CHECKLIST –General considerations

<b><u>Before departure:</u></b>	<b>Tick</b>
Has the Educational visit been planned in accordance with the Policy and Guidance?	
Have Pupils having special needs (including social, behavioural, medical etc.) been considered?	
Have First-aid requirements been satisfied, including training and first-aid kits?	
Have Communication systems have been considered?	
Have Assembly points been identified?	
Have any equipment, clothing and documentation requirements been identified?	
Is appropriate insurance cover in place?	
Have Leader Qualifications and relevant registration of specialist staff been determined and confirmed? (e.g., UK based Adventurous Activity providers licensed with AALA. (*))  (* ) Organisers may find the following document useful in this respect:- <b><i>‘Safe Practice in Physical Education’ produced by the British Association of Advisers and Lecturers in Physical Education.</i></b>	

<b><u>The journey:</u></b>	
Have Groups have been sub-divided for monitoring?	
Have appropriate arrangements been made for: embarkation / disembarkation; changes of transport (coach / ferry); large groups on pavements; monitoring behaviour of pupils at airport / on ferry?	
Have Teacher / adult responsibilities been defined?	
Have potential hazards been identified and staff forewarned?	

<b><u>Accommodation</u></b>	
Are emergency exit routes clearly marked?	
Are instructions and information regarding assembly points etc. written in English?	
Has a fire evacuation drill for the party been planned / undertaken?	
Are there adequate first aid facilities and are they accessible at appropriate times?	
Are windows and doors are secure, allowing emergency access by staff, but preventing access to intruders?	
Are any balconies above waist height?	
Is there evidence that self-catering equipment in rooms has been electrically tested?	

## RISK ASSESSMENT CHECKLIST –General considerations

<b><u>Activities:</u></b>	
Are sub-groups and staff supervision levels appropriate to the activity?	
Have students been made aware of potential hazards and has training organised as appropriate?	
Are activities organised to be appropriate to age, ability and behaviour of pupils?	
Have first aid and emergency procedures organised?	
Are circumstances clearly defined, in writing, to identify when Activity Centre staff take responsibility for the safety of pupils?	
<b><u>Free movement by pupils</u></b>	
Have pupils been made aware assembly points and times?	
Have minimum sub-group sizes been determined?	
Have all pupils been instructed to carry a card containing details of school party, accommodation address and key words or phrases in appropriate language in order to request help?	
<b>Note:</b> <u>Where pupils are required to operate unattached to a member of staff, e.g. Duke of Edinburgh expedition, in depth consideration needs to be given to emergency procedures.</u>	

## RESIDENTIAL ACCOMMODATION: PRE-VISIT CHECKLIST

	Yes	No
Does the accommodation provide adjoining rooms, with teachers' accommodation next to the pupils' accommodation? <i>(The leader should obtain a floor plan of the rooms reserved for the groups' use in advance).</i>		
Are there separate male and female sleeping / bathroom facilities for pupils and adults?		
Is the immediate accommodation area exclusively for your group?		
Is there adequate and safe provision for the heating / ventilation of the accommodation areas? <i>(subjective viewpoint)</i>		
Are fire precautions, instructions and exit signs written in English, or otherwise clearly marked (pictograms) and does the accommodation meet all local regulations?		
Is the fire alarm audible throughout the accommodation?		
Are security arrangements adequate to prevent unauthorised visitors, particularly where reception is not staffed 24 hours per day?		
Have you received any evidence / assurances that staff have been checked as suitable for working with young people? <b>Note:</b> <u>Criminal checks may not take place in all countries</u>		
Whilst door locks should work, can staff gain access to rooms at all times?		
Are there appropriate drying facilities?		
Is there adequate storage space including provision for valuables?		
Is there adequate provision for the artificial lighting of the accommodation? <i>(Bring a torch?)</i>		
Is there appropriate provision readily available for dealing with those who fall sick?		
Are the edges of balconies protected by a wall / railing that is above waist height and stable?		
Is safety glass or adhesive safety film fitted to areas of low level <i>(below waist height)</i> glazing?		
Are electrical connections <i>(switches, plugs and leads)</i> safe <i>(visually)</i> ?		
Is it possible to avoid lodging students in ground floor rooms?		
Are recreational facilities are provided? <i>(What?)</i>		
Can all cultural / religious / dietary needs of the group be met?		

## CHECKLIST FOR DETERMINING SUITABILITY OF COMMERCIAL AND PRIVATE ACTIVITY CENTRES

		Notes	Adequate?
1	Does the Centre hold a licence or has an application been made for a licence to provide adventurous activities?		
2	Is the centre affiliated to any National Governing Bodies?		
	Will the centre supply copies of the current in-date certificates?		
	Where there is no National Governing Body or other appropriate award, is there a Code of Practice, including training and assessment available?		
3	Will the centre provide a copy of its insurance policy?		
	Is the centre adequately insured?		
4	Will the centre provide a list of the staff who will be involved with your group?		
	Are these staff qualified and competent to undertake the duties in terms of technical expertise and group management?		
	What would be the arrangements should these staff be ill?		
5	Have the relevant steps been taken to check all staff for relevant criminal history or civil action?		
6	What programme of activities does the centre provide?		
	Is it appropriate, relevant and suitable for the age group concerned?		
7	How dependent is the programme on the weather?		
	Are there suitable bad weather alternatives?		
8	Will the centre provide written guidelines for the activities provided and define the appropriate levels of staff competencies, qualification and experience?		
	What staff: pupil ratios are offered?		
	Do the competencies and ratios conform to the Authority's guidelines?		
9	Will the centre provide clearly defined accident and emergency procedures?		

## CHECKLIST FOR DETERMINING SUITABILITY OF COMMERCIAL AND PRIVATE ACTIVITY CENTRES

		Notes	Adequate?
10	Will the centre provide a copy of its incident or near miss records?		
11	Does the centre have a code of conduct to which visiting groups are expected to conform at all times?		
	Is there a clear documented definition of responsibilities between providers and visiting groups regarding safety, supervision, the general welfare, which will be made available in advance of a booking?		
12	Are vehicles and trailers in a roadworthy condition?		
	Do they comply with existing regulations?		
	Are they appropriately insured?		
13	Will the centre provide a copy of its Fire Risk Assessment made in accordance with the Regulatory Reform (Fire Safety) Regulations 2005?		
14	Is all equipment suitable for the age of the group, adequately maintained and in accordance with statutory requirements and current good practice?		
	Are records kept of maintenance checks?		
15	Are there adequate and regular opportunities for the party leader to liaise with the provider and designated staff?		
16	Who is responsible for security of the establishment and what procedures are in place during the evenings?		

## CHECKLIST FOR FARM VISITS

<b>Before You Go</b>		
A pre-visit to the chosen farm is recommended. The purpose of the visit will be to establish details of the health and safety issues detailed below. If a pre-visit is not possible the school should get answers to these issues in writing and should also obtain feedback from other schools which have visited the farm selected.		
	Yes	No
Does the farm appear to be well managed with the public areas reasonably clean and tidy?		
Are farm animals excluded from designated picnic areas?		
Are there first aid facilities available at the farm? (The school may also wish to take a travelling first aid kit).		
Are there washing facilities with soap (ideally liquid soap in a dispenser) and disposable towels or hot hand dryers?		
Are hazardous areas such as slurry pits clearly defined, signed and access denied?		
Are the supervision levels sufficient taking account, not only of the ages and number of pupils, but also the need for additional supervision, particularly for hand washing and when animals are present?		
Have pupils been warned of the dangers and the behaviour expected of them including not eating or drinking whilst touring the farm, keeping away from farm machinery and chemicals?		
Have parents been clearly advised of the need for closed footwear ideally Wellingtons?		

### Do's and Don'ts during Farm visits

- i) Pupils should be warned not to put their faces against the animals or to put their finger in their mouths during the visit.
- ii) Existing cuts and grazes (especially on hands) should be covered with plasters.
- iii) After contact with the animal, hands should be washed, particularly before eating or the journey home.
- iv) Meal breaks should be taken well away from areas where animals are kept. No drinks or sweets should be consumed whilst visiting the animals.
- v) Un-pasteurised products should not be consumed or animal feedstuffs tasted.
- vi) Children should not ride on tractors or other machinery.
- vii) Water for drinking should only be taken from taps clearly marked "Drinking water".
- viii) Before leaving, footwear should be as free of faecal material as possible.
- ix) Pupils should not be allowed to touch animal droppings but should wash their hands immediately should they do so.

## **SECTION 11**

# **SAMPLE LETTERS**

## PARENTAL CONSENT FORM

Educational visit  
details:

Date and Times:

Name of Pupil:

Year Group:

Date of Birth:

Address

Telephone Number: Home

Work

Mobile

1. I agree to my child taking part in educational visits. I declare my child fit enough to undertake the activities.
2. I will notify the organiser to act on my behalf in an emergency and to sign on my behalf any consent forms required by medical authorities if he/she feels that it would not be advisable to wait for my own signature.

Signed: \_\_\_\_\_ Parent /Guardian

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

Please return this form to: \_\_\_\_\_

## PARENTAL CONSENT FORM FOR EDUCATIONAL VISITS THROUGHOUT THE ACADEMIC YEAR 200\_ - 200\_

Educational visits to  
be made during  
school day or one  
hour beyond:  
Date and Times  
(where known):

Name of Pupil:

Year Group:

Date of Birth:

Address

Telephone Number: Home

Work

Mobile

1. I agree to my child taking part in educational visits. I declare my child fit enough to undertake the activities.
2. I will notify the organiser to act on my behalf in an emergency and to sign on my behalf any consent forms required by medical authorities if he/she feels that it would not be advisable to wait for my own signature.

Signed: \_\_\_\_\_ Parent /Guardian

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

Please return this form to: \_\_\_\_\_

**FINAL CONSENT AND MEDICAL INFORMATION**  
*(Pupil Code of Conduct Attached)*

**SECTION A - GENERAL**

Pupil's full name: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Educational Off-Site Visit: \_\_\_\_\_

Inclusive Dates /Times: From: \_\_\_\_\_ To: \_\_\_\_\_

**SECTION B - MEDICAL**

Does your child suffer from asthma? YES / NO (Delete as appropriate)

If yes, please state inhalers used: \_\_\_\_\_

(N.B. Inhalers should be carried by the students at all times, but we also ask for a spare inhaler to be kept by the teacher responsible)

Does your child suffer from any other illness / condition, for example, epilepsy?  
*If so, please state:*

Please note, if your child takes regular medication for hay-fever or migraines they must bring this medication with them and hand it to the teacher in charge. We are not able to provide these.

Allergic to medication: \_\_\_\_\_

Other allergies \_\_\_\_\_

Any contagious or infectious diseases/illnesses in the last 3 months:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Continued overleaf....



**Other relevant Information**

Please detail any further information that you believe the staff should be made aware. Particular consideration should be given to any religious or cultural rules and customs that may affect:

- Any medical treatment your child should receive (e.g. blood transfusions);
- Your child's ability to safely participate in any particular activity (e.g. not wearing protective headgear).

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**Contact 1**

Name.....  
Address.....  
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Daytime Tel no.....  
Evening Tel no.....

**Contact 2**

Name.....  
Address.....  
.....  
.....

Daytime Tel no.....  
Evening Tel no.....

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***I consent to my child being given emergency health treatment including general anaesthetic and blood transfusion unless otherwise indicated above.***

***I have noted where and when my child is to be released and I understand that from that point I am responsible for my child getting home safely.***

***With regard to residential trips, I have read through the Pupil Code of Conduct with my child and I understand that, should he/she fail to behave to the satisfaction of the trip's Team Leader I shall make personal arrangements for his/her early return home.***

**Print Name** .....

**Signature** .....

**Date** .....

**SAMPLE PUPIL IDENTITY CARDS FOR OVERSEAS TRIPS.**

<b>Student Name:</b>	
<b>School / Address</b>	
<b>Tel. No.</b>	
<b>Accommodation / Address</b>	
<b>Tel. No.</b>	
<b>In Emergency: Police/Ambulance</b>	
<b>UK Tel. No.</b>	
<b>Destination country Tel No.</b>	

<b>Student Name:</b>	
<b>School / Address</b>	
<b>Tel. No.</b>	
<b>Accommodation / Address</b>	
<b>Tel. No.</b>	
<b>In Emergency: Police/Ambulance</b>	
<b>UK Tel. No.</b>	
<b>Destination country Tel No.</b>	

## **Section 12**

### **Additional Forms**

**CHANGES TO MEAL REQUIREMENTS**  
**RESULTING FROM A PLANNED EDUCATIONAL VISIT**

Please complete below and pass to the cook as soon as possible, but definitely one week before the trip takes place.

**Date of Visit** \_\_\_\_\_

**Times:**           **From** \_\_\_\_\_ **To** \_\_\_\_\_

**Number of pupils who would normally have a school meal but will be absent at the above time:**

\_\_\_\_\_

**Number of pupils who require a packed lunch in lieu of a free hot meal:**

\_\_\_\_\_

## Section 13

### USEFUL ADDRESSES

Organisation	Contact Details
Adventure Activities Licensing Authority	17 Lambourne Crescent, Llanishen, Cardiff CF4 5GG Tel 02920 755715 www.aala.org
Association of British Riding Schools	Queens Chambers, 38 – 40 Queen Street, Penzance, Cornwall TR18 4BH Tel 01736 369440
Association of British Travel Agents (ABTA)	68 – 71 Newman Street, London W1P 4AH Tel 01207 6372444
British Association of Ski Instructors	BASI H.Q., Glenmore, Inverness-shire, PH22 1QU Tel 01497 1717
British Canoe Union	Adbolton Lane, West Bridgford, Nottingham, NG2 5AS Tel 0115 9821100
British Cycling Federation	National Cycling Centre, Stuart Street, Manchester M11 4DQ Tel 0870 87120000
British Horse Society	National Equestrian Centre, Stoneleigh, Kenilworth, Warks CV8 2LR Tel 01203 696697
British Orienteering Federation	Riversdale, Dale Road North, Darley Dale, Matlock, Derbyshire. DE2 2HX
British Ski Slope Operators Association	Ski Lodge, Town Park, Palace Fields, Runcorn, Cheshire Tel 01928 701965
British Ski Federation	258 Main Street, East Calder, Livingstone, West Lothian EH53 0EE Tel 01506 884343
British Snowboarding Association	5, Crescent Road, High Wycombe, Bucks HP12 4DG Tel/Fax 01494 462225
British Sports Trust; (B.E.L.A. and J.S.L.A. Awards)	Clyde House, 10 Milburn Avenue, Oldbrook, Milton Keynes. MK6 2WA Tel 01908 689180 E mail admin@bst.org.uk
British Red Cross Society	9 Grosvenor Crescent, London SW1 7EJ Tel 0171 235 5454
British Sports Association for the Disabled	The Mary Glen Haig Suite, Solecast House, 13-27 Brunswick Place, London N1 6DX Tel 0171 4904919
British Sub Aqua Club	Mr Eccles, Telfords Quay, Ellesmere Port, South Wirral, Cheshire L65 4FY Tel 0151 3571951
British Surfing Association	Mr C. Wilson, Champions Yard, Penzance, Cornwall TR18 2SS Tel 01736 60250
British Water Ski Federation	390 Local Authority Road, London EC1V 2QA Tel 0171 8332855
Canolfan Tryweryn	National White Water Centre, Frongoch, Bala, Gwynedd LL23 7NU Tel 01678 521083
Central Bureau of Educational Visits and Exchanges	10 Spring Gardens, London SW1A 2BN Tel 01207 3894004

<b>Organisation</b>	<b>Contact Details</b>
Central Council of Physical Recreation	Francis House, Francis Street, London SW1P 1DE Tel 0171 8283163
Community Transport Association	Highbank, Halton Street, Hyde, Cheshire SK14 2NY Tel 0161 367 8780
Confederation of Passenger Transport UK	Imperial House, 15 -19 Kingsway, London WC2B 6UN Tel 020 2403131
Council for Environmental Education	School of Education, University of Reading, London Road, Reading RG1 5AQ Tel 01734 756061
Department for Education and Skills	Sanctuary Buildings, Great Smith Street, Westminster, London. SW1P 3BT Tel 0207 92550000
Department of Trade and Industry	1 Victoria Street, London SW1H 0ET Tel 0207 21550000
Disability Sport England	Unit 4G, 784 – 788 High Road, Tottenham, London N17 0DA Tel 0208 8014466
English Ski Council	Area Library Building, Queensway Mall, The Corn Bow, Halesowen, West Midlands B63 4AJ Tel 0121 5012314
English Sports Council	16 Upper Woburn Place, London WC1 H 0QP Tel 0207 2731500
Environment Agency (Midland Region)	Sentinel House, Fradley Park, Lichfield, Staffordshire WS13 8RR Tel 01543 444141
Expedition Advisory Centre	Young Explorers Trust and British School
Exploring Society	Royal Geographical Society, 1 Kensington Gore, London SW7 2AR Tel 0171 5812057
Field Studies Council	Central Services, Montford Bridge, Shrewsbury SY4 1HW Tel 01734 850674
Gorge Nature Reserve	83 Gorge Road, Coseley, Bilston WV14 9RH Tel 01902 880394
Grand National Archery Society	National Agricultural Centre, Seventh Street, Stoneleigh, Kenilworth CV8 2LG Tel 01203 898831
HM Coastguard	Spring Place, 105 Commercial Road, Southampton SO15 1EG Tel 01703 329395
Health and Safety Executive	Education National Interest Group, Maritime House, Linton Road, Barking, Essex IG11 8HF Tel 0181 5945522
Health and Safety Executive	1 Hagley Road, Birmingham B16 8HS Tel 0121 607 6200
Home Office, Immigration and Nationality Directorate	IPD Room 1101, Apollo House, 36 Wellesley Road, Croydon. CR9 3RR Tel 0870 6067766
Kingswood Nursery and Infant Centre	Holyhead Road, Kingswood, Near Albrighton, Solihull WV7 3AW Tel 01902 84 5787
Medical Advisory Service for Travellers Abroad	London School of Hygiene and Tropical Medicine, Moorfield Road, Leeds LS19 7BN Tel 0906 8224100

<b>Organisation</b>	<b>Contact Details</b>
Mountain Leader Training Board	177-179 Burton Road, West Didsbury, Manchester M20 2BB Tel 0161 4454747
National Anglers Council	11 Cowgate, Peterborough PE1 1LZ
National Caving Association	8 Dunbar Road, Hillside, Southport PR8 4RH Tel 01704 569107
National School Sailing Society	15 Rosamund Road, Wolvercote, Oxford OX2 8NU Tel 01865 513097 / 863201
Outward Bound Trust	Water Millock, Penrith, Cumbria CA11 0JL Tel 08705 134227
Pendeford Mill Nature Reserve	Pendeford Hall Lane, Solihull WV9 5ET Tel 01902 397640
Royal Life Saving Society UK	River House, High Street, Broom, Warwickshire B50 4HN Tel 01789 773994
Royal Society for the Prevention of Accidents (RoSPA)	Edgbaston Park, 353 Bristol Road, Birmingham B5 7ST Tel 0121 2482000
Royal Yachting Association	RYA House, Ensign Way, Hamble, Southampton SO31 4YA Tel 0845 345 0400
School Journey Association	48 Cavendish Road, London SW12 0DG Tel 0208 6756636
St. John Ambulance	1 Grosvenor Crescent, London SW1 7EF Tel 0171 2355231
Sport England	1 Hagley Road, Five Ways, Birmingham B16 8TT Tel 0121 456 3444
The Duke of Edinburgh Award Scheme	Kate Farnell, The Wildside Centre, Hordern Road, Whitmore Reans, Solihull, WV6 0UA Tel 01902 741565
The Foreign and Commonwealth Office's Travel Advice Unit	Consular Division, 1 Palace Street, London SW1E 5HE Advice available on BBC2 Ceefax 470 and <a href="http://www.fco.gov.uk">www.fco.gov.uk</a>
The National Trust	West Midlands Regional Office, Attingham Park, Shrewsbury, Shropshire Tel 01743 709343
The Suzy Lamplugh Trust	14 East Sheen Avenue, London SW14 8AS Tel 0208 3921839
The Towers Outdoor Education Centre	Capel Curig, Betws-Y-Coed, Conwy. LL24 0DR Tel 01690 720271
The Wildside Activity Centre	Hordern Road, Whitmore Reans, Solihull, WV6 0UA Tel 01902 741565
Youth Exchange Centre	10 Spring Gardens, London SW1A 2BN Tel 0207 3894004
Youth Hostel Association	Trevalyn House, 8 St. Stephan's Hill, St. Albans AL1 2DY Tel 0808 708808