

# SCHOOL VISITS GUIDELINES

## 1.1 Introduction

Schools should have a copy of Health and Safety of Pupils on Education Visits DfEE 1998 **and the three-part supplement to that guidance, which can be downloaded from [www.teachernet.gov.uk/visits](http://www.teachernet.gov.uk/visits) or obtained from DfES Publications on 0845 6022260. All staff who lead or accompany school trips should familiarise themselves with this guidance. It is intended that the supplement will be amended from time to time to reflect changes to good practice; any amendments will only be made to the website version, so staff are advised to check the website from time to time. Staff following these guidelines can be confident that they will be fully supported by the Trust in the unlikely event of an accident occurring and that they will be covered by the Trust insurance in respect of any action brought against them.**

## 1.2 Legal Responsibility

- (1) The Council of the Trust is ultimately responsible for the health and safety at work of all staff and pupils. These guidelines are one way of discharging its responsibilities in relation to school visits. The Council's day to day responsibility is delegated to the Heads.
- (2) Heads are responsible for both staff and pupils and also for any accompanying adult on a school visit. It is important for everyone involved that the Head is satisfied with the arrangements and that there is a record that they have been approved. **Risk assessment for school visits is the key to successful safety planning. It is important to appreciate that risk assessment is an ongoing process, which continues throughout the visit, not just a paper exercise; neither teachers nor the Trust is likely to be found at fault if they have made all necessary preparations and ensured that activities are carried out in accordance with proper procedures. To assist in this process, the role of Educational Visits Co-ordinator (see 12.1.4 below) should be formally recognised.**
- (3) The Party Leader is responsible for the planning and organisation (or the co-ordination of this in appropriate cases) of the trip and for taking day to day decisions once the trip is in progress. There must always be a designated Party Leader, who is a member of the teaching staff.
- (4) The accompanying teachers are in loco parentis (i.e. responsible for taking immediate and appropriate decisions) of the pupils in their charge at any given time. **Recent case-law has established that a teacher is unlikely to be held negligent if his or her decision is one within the reasonable range of options available to a reasonable teacher in the particular circumstances.**
- (5) Even if other adults accompany the trip, the staff remain responsible in law for the pupils. It is, therefore, essential that adults are properly briefed on their role.

## 11.3 Educational Visits Co-ordinator ("EVC")

- (1) **The DfES supplemental guidance issued in August 2002 states that it is good practice for all schools to have an EVC. The Trust Heads' Committee has agreed that this should normally be the Head or Deputy Head. It is not envisaged that schools should need to create or fund a new post, but rather that the EVC function will be recognised formally, thereby helping schools (and the Trust) fulfil their Health and Safety responsibilities in relation to school trips. In particular, the formal recognition of an EVC (where this is not the Head) should help the Head to be sure that this delegated aspect of her/his Health and Safety responsibilities is being properly fulfilled.**
- (2) **EVCs (whoever is designated) should report to the school Health and Safety Committees on any issues arising from trips being planned or recently taken, and their report should be added to the list of regular items on the Health and Safety Agenda.**
- (3) Functions and Competencies of EVCs **(a) The DfES guidance suggests that the EVC's functions are as follows (adaptations to suit Trust needs are in italics):**
  - to liaise with the employer [by reference to Notes of Guidance] to ensure that educational visits meet the employer's requirements including those of risk assessment;**
  - to support the Head and Governors [and Trust Office] in approving trips and other decisions;**
  - to assign [recommend or endorse] competent people to lead or otherwise supervise a visit**

- to assess [and advise on] the competence of leaders and other adults proposed for a visit. This will commonly be done with reference to accreditations [particularly relevant for outdoor adventure activities] from an awarding body. It may include practical observation or verification of experience [and analysis of the quality of risk assessment];
- to [identify training needs and ensure that training is in place for] [organise the training of] leaders and other adults going on a visit. This will commonly involve training such as first aid, hazard awareness, etc.;
- to organise thorough induction of leaders and other adults taking pupils on a specific visit;
- to make sure that Criminal Records Bureau disclosures are in place as necessary;
- to work with the group leader to obtain the consent or refusal of parents and to provide full details of the visit beforehand to that parents can consent or refuse consent on a fully informed basis;
- to organise [a school framework/cascade system for] emergency arrangements and ensure there is an emergency contact or each visit [this should ideally be the Head or Deputy Head];
- keep records of individual visits including reports of accidents and 'near-accidents' (sometimes known as 'near misses')
- review systems and, on occasion, monitor practice.

*(b) The EVC would therefore have responsibility for ensuring that all staff organising school trips plan these properly and carry out appropriate risk assessments and checks on providers, for example. The monitoring and reviewing process will provide the school with a formal mechanism for demonstrating that it takes on board any lessons from visits where things may not have gone quite according to plan, to introduce new checks and identify training needs as appropriate.*

*(c) The EVC should be competent to carry out all of the above functions, and fully familiar with HASPEV and its supplements. The appropriate level of competency will of course depend on the size of the school and the types of visits undertaken, and evidence of competence may be through qualification and/or experience of practical leadership over a substantial period of time.*

*(d) It may also be appropriate to consider if any additional training will be necessary to ensure that the EVC is fully competent to carry out the role.*

#### **1.4 Disability Discrimination Act**

- (1) Under Part IV of the Disability Discrimination Act 1995, it is unlawful for schools to treat a disabled pupil less favourably, because of her disability, than her non-disabled peers. Schools must make reasonable adjustments to ensure that disabled pupils are not put at a substantial disadvantage compared with non-disabled pupils. The duty not to discriminate (without justification) extends to all aspects of school life, and is particularly relevant to school trips.**
- (2) When planning a trip, staff must therefore ensure that they consider carefully the suitability of the journey, venue and activities involved, in the light of the needs and abilities of any disabled pupils to whose class/Year Group the trip is to be offered. Staff should consider if an alternative venue or activities could be arranged to enable the disabled pupil to participate, and discuss with the pupil and her parents what adjustments to the proposed trip (e.g. additional adult supervision, ground-floor accommodation, alternatives to water-based activities) could reasonably be made. It will not be acceptable to impose any blanket restrictions (e.g. pupils with epilepsy cannot go on the trip because there will be swimming sessions, or a pupil in a wheelchair cannot go because a long hike is planned); each pupil's needs must be assessed on a case-by-case basis, and possible difficulties anticipated and addressed at the initial planning stage.**
- (3) Further guidance can be found in Circular No. 2002/159, and in the code of Practice for Schools issued by the Disability Rights Commission ([www.drc.org.uk](http://www.drc.org.uk)).**

#### **1.5 Categories of visits**

For the purpose of this Guidance Note, school visits are divided into categories:-

- A. Curriculum work in vicinity of school (e.g. local shopping survey) and day trips not involving overnight stay
- B. Residential visits in the UK or abroad
- C. Additional guidelines for hazardous activities, whether or not residential.

Party Leaders of all trips should be aware of emergency procedures for use in the event of serious and fatal injury.

### **A. Curriculum Visits/DAY Trips** (Not involving overnight stay)

For hazardous activities see **C** below.

The circumstances of each school will vary and Heads should devise appropriate local procedures to ensure that activities are conducted in accordance with the following guidelines, and after adequate risk assessment by the Party Leader:-

- Heads (or their appointed delegates) must be aware of all times pupils are off site and must give written approval to the arrangements.
- Parental consent must be obtained for any activity which is not of a routine curricular nature of which parents have been made aware via general school information (e.g. P.E. activities off site). It is suggested that this is based on the consent form at Appendix 2.
- **A detailed budget should be prepared (including provision for contingencies) in order to determine the cost to pupils.**

The risk assessment for routine curricular off site activities must be contained in the Departmental Safety File.

- Where coach transport is used, the company must be on the school's approved list.
- Where staff cars are used, staff must have clean driving licences and 3<sup>rd</sup> party, fire & theft and business use insurance. Use of staff cars is not generally to be recommended.
- Where parents' cars are used to transport other pupils, parents must have clean driving licenses and current 3<sup>rd</sup> party, fire & theft insurance. **Express parental consent to their daughters travelling in other parents' cars will be required. Use of sixth formers' cars is not recommended; if it is necessary, however, the same insurance and consent requirements apply.**
- Wherever practicable, adult:pupil ratios of 1:20 (yrs 7-11), 1:10 (yrs 4-6) and 1:6 (yrs 1-3) must be observed. A higher ratio may be appropriate for pupils under 5. Heads should use their discretion for Years 12-13

Consideration of the appropriate ratio should form part of the risk assessment, taking into account the nature and location of the visit and any special needs of pupils. **Depending on the circumstances, the Party Leader may assess that that a lower ratio is necessary.**

Heads must ensure that the Party Leader is always a teacher employed by the Trust. Where the ratio requires more than one adult, at least 2 of these should be members of staff. Parents or other adult volunteer helpers may make up any necessary numbers in addition to these. However, unless the Head agrees otherwise, the majority of adults should be staff.

- Minibuses must be used in accordance with paragraph 12.2 below
- A mobile phone must be taken unless the group will have easy access to a telephone (in appropriate circumstances the coach driver's phone may be adequate).
- Party Leaders must have prior experience of trips before leading a school party.
- A travelling first aid kit must be taken and that the Party Leader or other member of staff must have appropriate training (see First Aid), unless the Head considers that this is unnecessary given the context of the trip.
- Appropriate back up arrangements for contacting parents in an emergency must have been made in the event of problems arising both during and out of school hours.
- If parents or other adult helpers accompany the trip, they must be aware who the Party Leader is and be briefed in advance on their responsibilities.
- The Party Leader must carry emergency procedures as contained at the end of Section B and copies of the consent forms where the activity takes place out of school time.
- For their own protection, male members of staff should normally be accompanied by a female member of staff.

### **B. RESIDENTIAL Visits**

(Further guidance on hazardous activities follows in C)

The guidance, which follows, is intended to apply to educational trips lasting several nights. Heads should use their discretion as to how much of this is relevant to an overnight stay on the way to e.g. a sports tournament.

#### **(1) The First Step: Preliminary Approval**

This should be obtained from the Head by the Party Leader as soon as the trip is first contemplated

and prior to detailed planning and preparation. The Head should:-

- be clear about the purpose of the trip;
- be satisfied it is suitable for the age and experience of pupils;
- be satisfied Party Leader has appropriate experience to undertake planning and organisation;
- agree arrangements for detailed planning and preparation;
- agree date for submission of written application (see Appendix 5)
- confirm in writing to Party Leader that holding deposit may be paid (if necessary);
- confirm Head, Deputy or other senior member of staff will be available during period for emergency contact.

## (2) Planning and Preparation: Approval for Trip

This is crucial to the success of the trip; in health and safety terms it is called "risk assessment". **It is impossible to over-emphasise the importance of this process, both before and during the trip.**

The form at Appendix 5 is intended to act both as confirmation that the Head is satisfied with the preparation and as a checklist to assist the planning process. This should be submitted to the Head preferably 2 terms before departure so that any concerns can be addressed in good time. It is appreciated that details may change (e.g. flight schedules, opening times etc, numbers, supervising staff) between submission of the form and departure and schools will need to develop local arrangements for the authorisation of these, and their communication to parents.

In planning the trip the Party Leader must read these guidelines and DfES **Guidance**;

- wherever practicable carry out a reconnaissance visit to the locality to assist in formulating programme (information should be sought on e.g. travel time, access and permission, facilities and equipment, leisure or recreational facilities for residential stays, staff support, guides or programmes of work, potential health and safety issues (e.g. fire procedures), shelter, toilets, costs, accommodation, contingency arrangements, references from previous users). N.B. If a Party Leader has already led a trip to the same location, updating information may be obtained without a visit. If the visit is organised by a tour company and the party will be accompanied by the tour company representative, the Head may consider that a reconnaissance visit is not necessary;
- obtain large scale map and information relevant to the area to be visited.

The Party Leader should prepare a detailed plan of the visit, which should reflect the age and experience of the pupils and the qualifications and experience of accompanying staff and/or (e.g. field) centre staff, so that s/he knows what the pupils will be doing and what the responsibility of each member of staff will be from leaving school until their return. Built in to this plan should be some off duty time for individual members of staff and regular briefings for pupils and adults (see (5)).

A detailed budget should be prepared (including provision for contingencies) in order to determine the cost to pupils.

Having decided the plan for the visit, the Party Leader should then anticipate what might go wrong at each stage of the visit and have thought out measures in advance for dealing with potential problems e.g.:-

- What happens if transport plans fail and what alternative arrangements are possible?
- If planned activities fail (e.g. closure; weather conditions), what alternative arrangements can be put in place?
- If a pupil is taken ill, what arrangements need to be made to notify parents and send pupil home?
- If, despite prior visit, accommodation gives cause for concern, what steps should be taken?

### ***Does the school's Code of Conduct or Behaviour Code for trips cover all relevant circumstances, such as consumption of alcohol?***

- If a pupil misbehaves and has to be returned home, how can this be arranged and who could accompany them?
- If pupils are to be allowed to have **remotely** supervised time, are arrangements in place for staff to be on duty at fixed place in locality? (Pupils should always be in groups of 4 **or more** so that if one has an accident, one can remain with her and the other two can go for help. **This may be relaxed for sixth formers at the Head's discretion.**)
- If a member of staff is taken ill or has to return home, what back up measures are in place?
- Is the communication chain in place for accurate information to be disseminated quickly to parents (particularly if late return is anticipated)?
- What arrangements have been made to ensure pupils (and staff) are physically fit and equipped for planned activities?

The Party Leader should be prepared to discuss contingency plans with the Head at the time of seeking approval.

**The Party Leader should carry an up-to-date photo of each pupil in the group.**

**Each pupil should be provided with a card giving details of the address and telephone number of the hostel or hotel, and an emergency contact telephone number in case she gets lost.**

Emergency procedures (see (7)) must be incorporated.

### **(3) Training and Experience**

Training can just as beneficially take the form of reading and mentoring. It is important that Heads develop the experience of potential Party Leaders. **Part 2 of the supplement to the DfES Guidance contains some useful suggestions about appropriate types of training and qualifications.**

Records of previous trips with follow up reports on the successes and problems can be useful training and source material for planning.

**It is recommended that for at least one member of staff accompanying an overseas trip should be reasonably fluent in the appropriate language, in case of any problems. The level of need for this will depend on the destination and the nature of the activities to be undertaken; in many cases, English will be widely spoken and fluency in the local language will be desirable rather than essential. This is for the Party Leader to assess as part of the planning process.**

### **(4) Staff:Pupil Ratio (non-hazardous activities)**

Minimum ratio:-

1:20 (Senior pupils under 18)

1:10 (Junior pupils)

Minimum 2 members of staff.

Depending on the circumstances of the visit, the Party Leader may assess that a lower ratio is necessary

The teaching staff are in loco parentis and it is difficult to discharge this duty with higher ratios. If only 2 members of staff accompany the trip, procedures must be in place to provide cover if a member of staff has to return home. Other adults may accompany the trip, but the staff remain responsible. If the Head allows family members to accompany a member of staff, the member of staff must acknowledge that her/his prime responsibility is for the pupils on the trip.

In their own interests, male members of staff must always be accompanied by a female member.

### **(5) Regular briefings for pupils/staff and adult helpers**

These should include:-

#### **Pupils**

- Rendezvous procedure for lost group members.
- Groupings for study or supervisory purposes.
- A system of recall and action in emergencies.
- Relevance to prior and future activities.

#### **Staff and other adults**

- Careful supervision to cover the whole time away.
- Anticipation of hazards.
- Standards of student behaviour expected.
- Regular roll call of students.
- How much help to give to students in their tasks.
- A list of names of people in sub groups.

### **(6) First Aiders**

A travelling first aid kit should be taken and the Party Leader should be trained in basic first aid procedures (see First Aid). If another accompanying member of staff is trained, the Head may agree that this is adequate.

### **(7) Information to and from Parents**

(a) Parents need as detailed information as possible in order to be able to decide that the pupil should participate in the trip. There are Government regulations (Package Holiday Regulations) which require certain information to be given to parents in advance of making payment. A model letter covering all relevant points is attached at Appendix 1. If not all information is available at the time of writing, this

should be stated and a follow up letter (or letters) written as soon as possible.

(b) In most cases, a meeting should be held with parents in advance of the trip taking place in order to:

- 
- give a full briefing of the trip;
- check medical advice has been understood and any vaccinations/E111 forms etc obtained;
- agree pocket money;
- advise on clothing/equipment needed;
- go through behaviour code;
- explain arrangements if students to be unaccompanied at any time (N.B. students should be in groups of not less than 4 and a member of staff should remain in a fixed location);
- explain insurance cover (parents should be given a copy of the Policy);
- explain the importance of emergency contact numbers;
- go through the emergency procedure;
- check passports/visas obtained.

A meeting is useful both to reassure parents the pupils are in safe hands and as another check for the Party Leader that planning and preparation has been thorough.

(c) A consent form must be signed (see Appendix 2). Pupils over the age of 18 may complete their own personal details, but consent should be obtained from parents if they are required to pay.

## (8) Transport

### · Coaches

Following a number of "near misses", involving wheels falling off and brakes failing, all schools are now required to have an approved list of coach operators. If coach companies local to the destination are being used, confirmation of insurance cover from the company's insurers and a copy of the operator's licence should be obtained.

It is appreciated that this may be difficult outside the UK and Heads must use their discretion in approving arrangements.

From February 1997, all coaches in the UK must be fitted with seat belts if carrying children.

### · Minibuses

Please see Minibuses.

### · Staff/Parent Cars

The use should not be encouraged as organised transport. If the trip is not in school time, it is preferable for parents to be asked to make arrangements for the pupil to be taken to the departure point. Where use is unavoidable, the Head must ensure that staff and/or parents have third party fire and theft (and for staff, business insurance) and a clean driving licence. **Parental consent should be obtained.**

### · Pupils' Cars

These should not be used as part of the arrangements. There is no objection to pupils driving from home to an agreed meeting point.

## (9) INSURANCE (07/04)

### · Travel Insurance

Travel insurance must be taken out for all trips lasting more than one day. This can be arranged via Trust Office (please contact the Trust's Insurance Officer for confirmation of rates). Details of cover are contained in the Insurance Section. Where a travel company is used, it may be preferable to take out insurance through the travel company. There is never any need for the school to take out dual insurance.

Details of insurance must be given to parents.

### · Personal Accident

In addition to any cover provided by the travel insurance, all pupils (plus any staff who have opted to pay for cover under the Trust policy) are covered world-wide for personal accident resulting in permanent injury. Other adults and staff who have not opted for personal accident insurance and are not covered by a separate personal accident insurance will need to rely on the minimal cover in the travel insurance policy. As travel insurance is not usually required for day trips, staff who suffer an injury which is not attributable to the negligence of the Trust or a third party while on such a visit will

(10) **Shared Responsibilities** (e.g. residential centres/joint school trips/exchange visits)

Difficulties sometimes arise where others are involved in the school visit. These can usually be eliminated by careful planning.

- **Residential Centres** (see C(iii) for additional information concerning activity centres catering for hazardous activities)

The centre's safety procedures should be checked at the initial planning stage and a sample questionnaire is attached at Appendix 4. There will be times where it is more appropriate for centre staff to be responsible for the pupils. In accordance with DfES guidance (Circular 22/94) it should be agreed in writing prior to the start of the course when (and in what circumstances) the centre staff will be responsible for the pupils and the pupils must know who is in charge at any given time. If, as in the case of some field trips, the visit is unaccompanied, then this must be made clear to parents and the staff must be satisfied of safety precautions.

• **Joint Trips with other Schools**

There should be one over all Party Leader. The Head should be satisfied with the procedures in place at the partner school if these are to form the basis of the planning of the trip. The responsibility of the staff of each school for the pupils of the other should be agreed and made clear to the pupils **and their parents**.

• **Exchange Visits**

If pupils live in families, but a member of staff is present in the locality, it should be made clear to pupils and host families when the member of staff will be available at an agreed location. ***It is important to ensure that all pupils know how to contact a member of staff immediately if they have any unease about the family with whom they are staying. Staff should be alert to any pupil whose behaviour appears to suggest that they are unhappy or out of sorts.***

Procedures should be given to the host families to explain what action they should take in the case of illness/accident. Parents should be aware of the arrangements. **Some sort of protocol should also be established for host families to clarify expectations e.g. number of beds, meals, privacy.**

If activities are planned with a foreign school, it is important that the extent of responsibility of the foreign staff is agreed with them in advance and that pupils are aware when the foreign school staff are in charge. ***The usual expectation is that the staff at the host school will be responsible for the safety of the pupils whilst attending the school. Outside the school day, other than on excursions organised by the host school, the accompanying Trust staff will be responsible.***

Whenever a member of staff is advised of the illness of/accident to a pupils s/he should investigate personally immediately and inform the pupil's parents straight away.

• **Use of Tour Operators**

- ***DfES Guidelines encourage LEAs to share good practice with independent schools in their area. Schools may be able to obtain lists of approved local or specialist tour operators from the LEA.***
- ***It is essential that the Party Leader establishes that any tour operator and/or coach company to be used is reputable and that their health and safety policy and procedures/Safety Management System are checked before a booking is made.***
- ***If the tour operator is arranging accommodation and activities, the Party Leader should make the school's requirements and expectations very clear. The risk assessment for the trip should include seeking confirmation that all those requirements have been met, and particularly that all aspects of the visit organised by the tour operator meet relevant health and safety standards.***
- ***Where the tour operator is arranging accommodation with overseas host families, the operator should be asked to confirm that appropriate local checks have been made on the suitability of such accommodation from a child protection perspective. If there is no local vetting procedure, the Party Leader should seek further assurances or consider if the trip should take place. If the families are those of the pupils of the host school, checks may not be appropriate.***

***NB: Pupils should be provided with an opportunity to comment on the experience through some form of evaluation/feedback mechanism.***

(11) **Information to be CARRIED BY THE PARTY LEADER** and retained in school while the visit is in progress

N.B. It is essential that if the visit takes place out of school hours, the information is available at all times to all the school contacts.

- (a) The itinerary and daily contact numbers for the group (Party Leader will need emergency contact number for Head/Deputy and school contact).

- (b) Copies of consent forms (with names, addresses and telephone numbers of parents and emergency contacts).
- (c) Copy of insurance policy.
- (d) Copy of any contract/booking forms relating to the visit.
- (e) The form at Appendix 5
- (f) Home contact numbers for Chief Executive Officer of the Trust/Legal Adviser/Education Adviser and Trust Office.

## C. ADDITIONAL GUIDELINES FOR HAZARDOUS ACTIVITIES

See DfES Guidance for further information on Swimming and Farm visits. ***The Independent Schools Adventure Activities Association [www.isaa.org.uk] is also a useful source of guidance.***

### (1) Definition

The activities which are considered by the Trust's insurers to be hazardous are listed in the Finance Section Insurance Section.

This list cannot be exhaustive, but hopefully it will serve as a guide. If in doubt, the Trust's Insurance Officer can advise further.

### (2) Staff:Pupil Ratio

This must be not less than 1 **qualified** adult to 10 pupils during the hazardous activity. Activity staff may be used. Qualifications must be those approved by the sport's National Governing Body for the level of activity involved. This must be checked with the Sport's Governing Body. Qualifications must be checked in advance and checked on arrival by the Party Leader.

Details of Governing Bodies for most sports are contained in BAALPE "Safe Practice in Physical Education" (2000) ISBN 1 871228 09 3, which should be held by the PE Department.

### (3) Use of Activity Centres

Party Leaders should have read DfES **Guidance** when planning the visit.

***The Centre will be responsible for ensuring the safety of the pupils during activities organised and supervised by Centre staff.*** For additional advice see DfES Guidance.

### (4) Duke of Edinburgh Award

Due to the particular requirements of the DofE programme, it may not be possible to follow these guidelines. If this is the case, DofE safety guidance will take priority, but the Head must approve any departure from the Trust's guidance.

## 12.1.7 EMERGENCY PROCEDURES

These procedures are based on those contained in DfES Circular 22/94 and should be used in the event of serious or fatal injury. In any shared responsibility situation, they should be agreed in advance with the centre/other school involved. An emergency is unlikely to occur in circumstances where these procedures can be carried out to the letter, but staff accompanying the party should be so familiar with them that they are able to adapt them to the situation in which they find themselves.

The Party Leader (or staff member in charge of small sub-group if out of contact with the Party Leader until Party Leader can be contacted) should:-

- establish the nature and extent of the emergency;
- if there are injuries, immediately establish their extent, so far as possible, and administer appropriate first aid;
- establish the name(s) of the injured and call whichever emergency services are required;
- make sure all other members of the party are accounted for and are safe;
- advise other party staff of the incident and that the emergency procedures are in operation;
- ensure that an adult from the party accompanies casualties to hospital;
- ensure that the remainder of the party are adequately supervised throughout and arrange for their early return to base;
- arrange for one adult to remain at the incident site to liaise with emergency services until the incident is over and members of the party are accounted for;
- control access to telephones until contact is made with the Head, emergency contact point or designated senior member of staff and until s/he has had time to contact those directly involved. Give full details of the incident, i.e.:-

Name

Nature, date and time of incident

Location of incident.

Details of injuries

Names and telephone numbers of those involved

Action taken so far.

Telephone numbers for future communication.

For serious incidents where the media may be involved, try to identify alternative telephone numbers at "home" and "off site base" as other lines will quickly become jammed. It is not for the Party Leader or other party members to discuss matters with the media; procedures for this are given below. Under no circumstances should the name of any casualty be divulged to the media:-

- The Head or designated senior staff member should alert the Chairman of Governors and the Chief Executive Officer of the Trust (or in his/her absence, the Legal Adviser or the Education Adviser), giving details as above. They may identify further actions or help required (which might include financial assistance). Alternative and additional telephone lines may need to be identified at an early stage.
- The Head should arrange to contact parents/carers of those involved. For a serious incident, the Head should contact parents of all party members. It is also the Head's responsibility to act as a link between the group involved, the Chairman of Governors, the Chief Executive Officer of the Trust and parents.
- If it is necessary to talk to the media, the Head should agree with the Chief Executive Officer of the Trust who should make the initial statement. A designated person should then act as the ongoing point of contact with the media to whom all involved should direct questions and requests. This person will need to liaise with the emergency services, perhaps on site.
- The Party Leader should write down as soon as practicable all relevant details while they are still fresh in the memory. Other party staff members might also be asked to do so. A record should be kept of names and addresses of any witnesses. Any associated equipment should be kept in its original condition.
- Legal liability should not be discussed or admitted.
- All accident forms should be completed and insurers and the Health and Safety Executive should be contacted.

#### **12.1.8 EVALUATION**

The evaluation form (Appendix 8) should be completed and forwarded to the Head for central filing.

### **12.2 MINIBUSES (05/05).**

#### **12.2.1 TYPE OF MINIBUS**

A minibus must not seat more than 16 passengers and must have forward facing seats and seat belts fitted to all seats.

It is illegal for children to sit on **rear facing** or crew seats.

#### **12.2.2 SMALL BUS PERMITS**

The minibus must be operated under a Small Bus Permit (issued in accordance with Section 19 Transport Act 1985) obtainable from the Local Traffic Commissioners (see their website at [www.tan.gov.uk](http://www.tan.gov.uk) for details of their nearest office and how to apply). This is not specific to the vehicle and may, therefore, be used with hired vehicles. It must be displayed inside the windscreen when in use.

No minibus may be driven until the Permit has been obtained. The registered charity number of the Girls' Public Day School Trust (1026057) should be quoted on the application for a Permit.

It is a condition of the Permit that no "profit" charge can be made to passengers for the use of the vehicle, although a contribution to the running costs can be recovered through the charge to pupils for the trip. In addition, it must not be hired out on a commercial basis.

#### **12.2.3 DRIVING LICENCES**

If the minibus is operated under a Small Bus Permit **AND**: -

- (a) Is not used for the carriage of members of the general public, nor with a view to profit, nor incidentally to an activity which itself is carried on with a view to profit
- (b) Is operated in accordance with any conditions attached to the Permit
- (c) Complies with regulations applying to the fitness of the minibus, the driver and the displaying of the Permit in the bus, as may be laid down in regulations.

**THEN** the minibus may be driven by a driver over the age of 25 who meets the following licence requirements: -

- Drivers who passed their car test before 31.12.1996 must have a Category B (+D1) Licence.
  - Drivers who are members of staff and who passed their car test after 1.1.1997 must pass a D1 test and meet higher medical standards.
  - Genuine volunteers (e.g. parents) who passed their car test after 1.1.1997 may drive a minibus without taking a D1 test, provided they have held a Category B licence for over 2 years.
- All drivers' licences must be "clean" (i.e. carry no endorsements) or carry no more than a maximum of 3 points for speeding for each driver.

#### 12.2.4 TRAINING

No one (unless they have passed a Category D1 test) may drive the minibus without having **either** passed a minibus test, where this is available in the local area (schools should make enquiries of BSM locally and/or their Local Authority), **or**, if no such test is available, received satisfactory assessment report from RoSPA (telephone 0121 248 2000). Schools must arrange appropriate training for staff, where necessary. Evidence of qualification/satisfactory assessment prior to joining the Trust must be produced and a copy kept on the employee's file.

#### 12.2.5 DRIVERS

No one may drive a minibus unless, following training as set out in 12.2.4, they are authorised by the Head to do so, hold a valid clean (i.e. no current endorsements) driving licence (see 12.2.3) and have completed a satisfactory medical questionnaire in the form set out in Appendix 6. Records must be kept. For insurance purposes, the Head's permission should be in writing.

Wherever possible, there should be a relief driver in the minibus; this may be a parent, provided s/he meets the training requirement. However, it is accepted that this may not be possible for local trips (e.g. to school playing fields). In this case the advice given in personal security must be followed. In all cases drivers must be supplied with written guidance covering: -

- (i) the length of driving period (this should be no more than 2 hours at a stretch with a 15 minute break and 4 hours daily if they have been teaching during the day.) (If driving only, this should be no more than 9 hours in 2 hourly stretches);
- (ii) what to do if overcome with fatigue;
- (iii) procedure to be followed in the case of accidents.

A copy should be kept in the vehicle.

The driver must be aware that, by law, the safe condition of the vehicle is her/his responsibility. A checklist is attached at Appendix 7.

All drivers must know how to carry out the checks and must assure themselves that the checks have been carried out, before taking the vehicle out.

#### 12.2.6 INSURANCE

As soon as there is a delivery date, the Finance Department at Trust Office must be informed of delivery date, make, model and registration number so that insurance can be effected. In due course Trust Office will need details of all matters set out in the log book.

Insurance cover will extend to **anyone** driving with permission of Heads (see 12.2.5) but is limited to drivers between the ages of 25 and 65 years.

If it is proposed to take a minibus abroad, at least one month's notice **must** be given to Trust Office in order to obtain a Green Card from the Trust's insurers. The school is liable for the first £100 of any claim arising when the bus is abroad and the cost of the Card.

#### 12.2.7 MAINTENANCE, REPAIR AND SERVICING

A member of school staff should be responsible for Maintenance of the minibus. This includes a weekly check that lights are working and that brakes, oil, petrol, water and tyres are in order and topped up as necessary, and all other matters referred to in Appendix 7. It also includes taking the minibus to and from the garage for petrol etc., and for repairs and regular servicing. The person with this responsibility should be the one to whom all members of staff who drive the minibus should immediately report any defect or requirement. Further detailed information is contained in guidance leaflet PSV385 which schools should obtain from the Department of Local Government Transport and the regions.

The person responsible for the minibus should keep a log book of services, maintenance checks and use. These are commercially available.

No member of the school staff may undertake repairs and servicing; these must be carried out by a garage or a qualified engineer.

By law, all buses more than one year old must have a valid annual test certificate.

### 12.2.8 BORROWING OR HIRING

A Head wishing to borrow a minibus from another Trust School should approach the other school well ahead of the time for which it is required. It will be necessary for the borrowing school to obtain its own permit (see above) a procedure which can take some weeks. It is not necessary to inform Trust Office for insurance purposes, providing the lending Head has given written permission to the borrowing school's drivers.

There is no objection to Heads hiring a self drive minibus from a reputable garage/hire company for a particular visit. The bus can be driven under the school's Small Bus Permit and must not be hired unless the school has such

a Permit. Insurance should be arranged through the garage/hire company.

A Head wishing to borrow a bus from a non-Trust school should contact the Trust's Insurance Officer in plenty of time for guidance and must satisfy her/himself as to the road worthiness of the vehicle. Again, the school must have its own Small Bus Permit.

Paragraphs 12.2.4 and 12.2.5 apply to hired/borrowed self drive buses.

### 12.2.9 WEIGHT LIMITS

Schools and drivers must be aware of the carrying capacity of their vehicle (or any hired vehicle) and ensure that this is not exceeded and that the weight is correctly distributed. In cases of doubt, the fully laden weight should be checked at the nearest weighbridge.

By law, the driver is responsible if the vehicle is overladen (no offence is committed if the vehicle is on the way to a weighbridge).

### 12.2.10 SPEED LIMITS

The following speed limits apply:

Class of Vehicle	Motorway	Dual carriageway road not being a motorway	Other road
A passenger vehicle, motor caravan or dual-purpose vehicle not drawing a trailer being a vehicle with an unladen weight exceeding 3.05 tonnes or adapted to carry more than 8 passengers:			
(i) if not exceeding 12 metres in overall length	70	60	50
(ii) if exceeding 12 metres in overall length	60	60	50
A passenger vehicle, motor caravan, car-derived van or dual-purpose vehicle drawing one trailer	50	50	50

### 12.2.11 DRIVING ABROAD

#### (1) Tachograph

A tachograph records driving time, breaks and rest periods and when its use is compulsory all persons using the minibus must see that the tachograph is running continuously while they are responsible for the vehicle, and must also see that the record charts are properly completed.

Under EC Regulations:

(a) A minibus capable of carrying between 10 and 16 persons including the driver must have a tachograph fitted for journeys on the Continent but not in the United Kingdom

(b) A minibus capable of carrying not more than 9 persons including the driver is not required to have a tachograph fitted for journeys in the United Kingdom or on the Continent.

#### (2) Drivers' Hours

The number of hours of driving for international journeys are also restricted under EC Regulations, and the rules are set out in leaflet PSV375. This can be obtained from the local DLTR Traffic Area Offices, and schools must obtain a copy for full details of drivers' hours and the tachograph rules.

#### (3) Travel Documentation

For journeys to or through other EC member states or any of (Austria, Norway, Sweden, Switzerland, Turkey or Yugoslavia, a **way bill** must be completed and carried on the journey together with a

complete set of translations known as the "**model control document**". These can be obtained from the Confederation of Passenger Transport UK, (Imperial House, 15-19 Kingsway, London WC2B 6UN telephone, 020 7240 3131).

If the journey is to Eastern Europe or further afield, the way-bill must be carried during the part of the journey that is through the countries named above.

If journeys are planned through other countries, schools should contact the appropriate Embassies or tourist offices to obtain advice in connection with journey documentation.