

# Section Seven

## Planning and Authorisation Checklist

This checklist helps the head of establishment, governors/management committee, EVC and party leaders to ensure, as far as possible a safe, successful off-site activity.

### 1. Objectives

- Have the educational/personal development objectives been clearly established?
- Has due consideration been given to include all young people? (*Alternative programmes should be considered where necessary*)

### 2. Leader/Responsible Adults

- Has a party leader been approved by the head of establishment and EVC?
- Is he/she competent?
- Are all concerned familiar with the contents of these guidelines?
- Are all adults physically and mentally capable of undertaking the proposed the off-site activity?
- Is there requirement for an appropriately qualified First Aider in the group?
- Are staff accompanying/leading the groups appropriately qualified in accordance with these guidelines?
- Are other staff engaged to work with the group suitably qualified to the relevant National Governing Body standard? (e.g. British Canoe Union, Royal Yachting Association, etc.)
- Are staff suitably clothed and equipped?
- Have adults been CRB checked in accordance with Section 6?
- Have all adults completed and returned form OSA3 2003 (ADULTS)? See Appendix 4.

### 3. Risk Assessment

- Has full consideration been given to risk assessment?
- Have documents been completed taking into account generic models provided by the LA?
- Have staff and participants been involved in the risk assessment process where possible?

### 4. Location

- Is the chosen location appropriate to the proposed activities and the needs of the young people?
- Is accommodation appropriate to the needs of the young people?
- If using an outside provider, (e.g. activity centre, swimming pool), does it maintain similar standards to those expected by the LA?
- Are alternative arrangements available if necessary, e.g. bad weather?
- Does the accommodation meet the needs of the group in terms of age, gender, supervision etc.?

### 5. Approval

- Have the proposed plans been approved by:
  - the head of establishment?
  - governing body/management committee?
  - the LA, where required

### 6. Supervision Ratios

- Are ratios appropriate for the proposed activities, in accordance with Section 7 & 14 of these guidelines?
- Is the ratio of male/female responsible adults appropriate?

### 7 Preliminary Visit

- Has a pre-visit been completed?

- Has suitable/sufficient background information been obtained?

## **8 Contact with Parents/Carers**

- Have they been sufficiently informed of the proposed visit/activity?
- Has appropriate informed consent been obtained?
- Have parent(s) been informed of any special requirements?
- Has a meeting been convened, if appropriate?
- Have they been asked for information concerning their child's particular needs in respect of diet, health or fitness problems, which may be relevant to the visit?

## **9. First Aid**

- Is suitable First Aid equipment available?
- Is someone with relevant First Aid experience or training available on the off-site activity?

## **10. Transport**

- Is suitable transport available and arranged?
- Have you referred to and implemented the LA Minibus Guidelines if appropriate, taking particular note of issues relating to driver fatigue, supervision etc.?
- Does the vehicle(s) to be used have seat belts and is their use enforced?
- Is the driver appropriately qualified and CRB checked, if necessary?
- Where cars belonging to staff, parents or others are used, are the vehicles roadworthy and appropriately insured? (See appendix 4)
- Has parental permission been obtained for the transportation of young people by staff, volunteers or other parents vehicles?
- Have managers and staff referred to the LA's 'Transportation of Children Safety Guidelines'?

## **11. Equipment**

- Are you satisfied that the equipment to be used by the group has been checked for safety, is in good working order and meets the necessary safety standards?

## **12. Insurance**

- Have appropriate insurance arrangements been made? (See Section 9)

## **13. Finance**

- Have appropriate financial and VAT arrangements been made? (See Section 10).
- Are the arrangements in accordance with the education establishment's charging policy?

## **14. Young People**

- Have the young people been properly prepared and briefed on safety and emergency procedures, including:
  - Rendezvous procedures
  - Emergency actions
  - Supervisory groupings
  - Are the young people sufficiently capable of undertaking the proposed activities?
  - Are the young people suitably clothed and equipped?
  - Are special or differing needs catered for appropriately to promote inclusion?

## **15. Emergency Procedure**

- Is a suitable emergency procedure in place? See Section 11

## 16. Documentation

- Are the following available to take on the visit?
  - Tickets
  - Copies of these Guidelines
  - Completed copies of Form OSA2 for all participants.
  - Accident Report Forms
  - Base Contact Emergency Contact numbers
  - Insurance documents
  - Copies of risk assessments
  - Passports and visas if required
  - European Health Card if appropriate

### Recommended Adult/ Young Person Ratios for Off-Site Activities

The recommended ratios shown here are minimum appropriate levels. Higher ratios may be appropriate bearing in mind such factors as gender, age and ability of the young people, the presence of young people with special needs, the nature and length of the journey, nature of activities to be undertaken and the experience and competence of the staff involved. These can only be determined on an individual risk assessment basis. It may be that, following a Risk Assessment, control measures are put in place that move the activity from Category A risk to a Category B risk. This will not apply to the activities in Category C, which are established and non-negotiable because of the potential levels of risk involved. The genders of adults should reflect the genders in the party. Recommendations for specific activities are in Section 14.

Please note that all ratios reflect the LA's minimum staffing levels to be provided by the educational establishments. Provider staff should not be included in ratios.

### Non-Teacher Led Activity

There should always be a qualified teacher, or the headteacher in charge of or responsible for every school visit. There may be limited specific circumstances where it is acceptable for another adult, other than a teacher, to lead a group away from the education premises. In such circumstances that adult should remain subject to the direction/supervision of a teacher in accordance with arrangements made by the headteacher of that school (*for further information see Workforce Reform appendix 5*)