

# EDUCATIONAL VISITS

Policy Approved: June 2023  
Policy Renewal: June 2025

Reviewed by the SLT MAT Board

“The Trustees of the Southport Learning Trust are committed to safeguarding and promoting the welfare of children and young people at every opportunity and expect all staff and volunteers to share this commitment”

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### 1. Purpose of Policy

The Trust acknowledges the immense value of off-site visits and related activities to young people, and fully supports and encourages those that are well planned and managed.

It is a legal expectation that employees must work within the requirements of their employer's guidance; therefore Trust employees who work with children on offsite visits and related activities must follow this policy most of which is a reflection of Outdoor Education Advisers' Panel (OEAP) Employer Guidance (EG). [www.oeapeg.info](http://www.oeapeg.info)

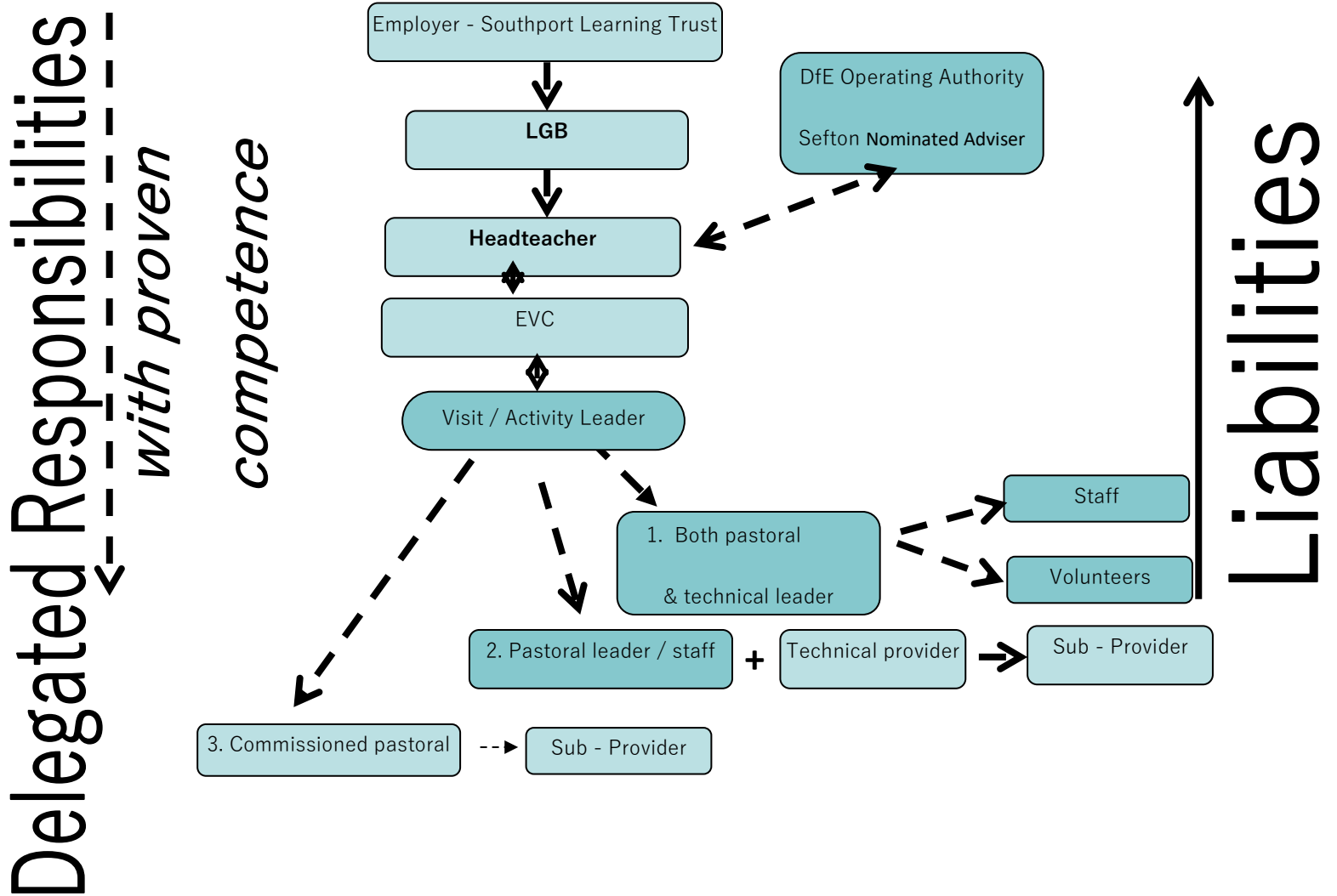
This policy provides all staff or volunteers with a clear picture on how to fulfil their health and safety duties. This policy supports and reinforces a common sense and proportionate approach to health and safety and assessment of risk. Nevertheless documentary evidence is still needed to support the fact where appropriate advance attention is given to the risks of an activity.

## 2. Delegated Responsibilities

When the Trust commissions a Learning Outside the Classroom, LOtC activity, it must ensure that such commissioned agent has either:

1. adopted Sefton Guidance or OEAP EG **or**
2. has systems and procedures in place where the standards are not less than those required by OEAP EG.

The flow chart below illustrates the lines of responsibility and liability.



### 3. Scope and Remit

The OEAP (Outdoor Educational Advisors Panel) EG clarifies the range of employees whose work requires them to use the guidance (1.1c). In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- deploying staff and volunteers who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base;

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

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP EG document [Underpinning Legal Framework](#)

### 4. Ensuring Understanding of Basic Requirements

As an employer, the Trust is required to ensure that its employees are provided with:

- appropriate guidance relating to visits and LOfC (Learning Outside the Classroom) activity;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed Advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The Trust uses a web-based system, EVOLVE (Educational Visits On-Line Virtual Environment), to facilitate the efficient planning, management, approval, monitoring and evaluation of visits. All staff and volunteers that lead or accompany visits can access their own EVOLVE account, which is set up by their establishment's Educational Visits Coordinator (EVC). As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including search and report facilities, downloadable resources and information, staff records and visit history.

EVOLVE: [www.seftonvisits.org.uk](http://www.seftonvisits.org.uk)

All EVC should attend an EVC OEAP accredited training course and will then act as EVC and support the Headteacher. The EVC should be specifically competent, with practical experience in leading and managing a range of visits similar to those typically run by the establishment.

The EVC should ensure that a policy is in place for educational and off-site visits, and that this is updated as necessary and readily available to staff and volunteers as well as uploaded on to EVOLVE.

The EVC should undertake a formal revalidation approximately every 3 years.

Refer to OEAP document [Responsibilities Headteacher](#)

Refer to OEAP document [Responsibilities EVC](#)

### 5. Adventurous Activities

If the establishment is leading an adventurous activity, as defined in the Adventure Activities Licensing Regulations 1996 (climbing, caving, remote trekking, waterborne activities), and other activities that present hazards significantly over and above those in everyday life, the manager must ensure that the group leader and

other supervisors are suitably competent to lead or instruct the children or young people in the activity. Competencies should be demonstrated by holding the relevant National Governing Body (NGB) award where it exists. Where there are queries regarding the competencies/experience required, the Offsite Visits Adviser or relevant NGB (National Governing Body) should be contacted for advice.

## **6. Other Areas**

Staff and volunteers competence in areas such as first aid, minibus driving and life-saving must also be considered when planning activities.

Volunteers will require induction training prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process.

Where an employee requires further guidance they should contact the nominated adviser.

The Trust's nominated adviser in Sefton is:

**Anne Mason**  
**Telephone: 0151 934 3652**  
**E-mail [anne.mason@sefton.gov.uk](mailto:anne.mason@sefton.gov.uk)**

## **7. Approval and Notification of Activities and Visits**

Headteacher approval and guidance from the Trust's nominated adviser is required for visits and activities fulfilling any of the criteria below:

- Visit/activity involves the provision of an adventurous activity to be led by a member of establishment staff or volunteer
- Visit/activity involves field work to be led by a member of establishment staff or volunteer in an area of open country
- Visit/activity involves a journey abroad or a significant sea crossing (this includes visits to the Isle of Man, Northern Ireland, the Orkneys and the Shetland Islands)

The Headteacher will inform the Local Governing Body of all visits that match the criteria.

An on-line system for notification and approval called EVOLVE is used. A key feature of this system is that visits and LOtC activities requiring approval are automatically brought to the attention of the EVC. Those visits and activities not requiring approval may be viewed sampled or monitored using the database and diary facilities of the system.

**START**  
Will an External Provider, Activity Centre or Tour Operator be used?

NO

YES

Does the provider hold a LOTC Quality Badge?  
[www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

NO

YES

Seek alternative evidence of competence and/or good practice. If necessary, e-mail an Independent Provider's Questionnaire to the provider. Retain completed unmodified form at your establishment

Will a member of your establishment's staff or volunteer be leading an adventurous activity

YES

The member of staff or volunteer must be specifically approved to lead the activity.  
Leader Approval must be obtained via EVOLVE

NO

Will the visit be residential, overseas, or involve

YES

NO

Has the Visit Leader been assessed as competent to lead the visit and is s/he able to comply with the [Visit Leader Checklist](#)?

YES

YES

Has the visit been approved by the EVC and Head of Establishment?

YES

Yes

**Approval is delegated to the Head of Establishment**  
This would normally be via EVOLVE, unless operating under standard operating policies or procedures for simple, local low risk activities

**Approval is delegated to the LA via Evolve**  
The visit must also be notified to the Local Governing Body

Establishment should monitor visits on a sample basis

**THE VISIT MAY PROCEED**

Assess risks on an on-going basis and implement appropriate

Evaluate the visit via EVOLVE

**Visit Flowchart**  
Note: This process is automatically followed when using EVOLVE

## 8. Risk Management

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

The risk management of an activity should be informed by the benefits to be gained from participating. The Trust strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is “acceptable”. HSE endorse this approach through their **Principles of Sensible Risk Management** and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal requirement to produce a risk management in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. However, Sefton LA ensures that establishments are supplied with an electronic portfolio of exemplar generic risk-benefit assessments via EVOLVE.

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

Risk assessment procedures are clearly outlined on EVOLVE and a library of generic risk management plans are made available to staff.

Refer to OEAP document: [Risk Management](#)

## 9. Emergency Planning and Critical Incident Support

Staff or volunteers involved in a visit must be aware of and adhere to their establishment’s policy on emergency procedures and reporting accidents/incidents. Certain incidents are also reportable to HSE under RIDDOR (Reporting of Injuries Diseases and Dangerous Occurrences Regulations)

[For further information on reporting pupil accidents](#)

A critical incident is an incident where any member of a group undertaking an off-site activity has:

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

As an employer, the Trust is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

24 hour support is available through the nominated Senior Leader.

Their number should be carried by leaders at all times during residential/out of hours off-site activities but should only be used in the case of a genuine emergency. *Under no circumstances should these numbers be given to young people or to their parents or guardians.*

Refer to OEAP document [Critical Incident Management for Visits](#)

## 10. Monitoring

As an employer, the Trust ensures that there is sample monitoring of the visits and LOtC activities undertaken by its establishments, either by attaching such monitoring duties to its officers, or by delegating these tasks to establishments. Such monitoring should be in keeping with the recommendations of OEAP Employer Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the establishment EVC.

Refer to OEAP document [Monitoring](#)

See also [Evaluation of LOtC](#)

## 11. Assessment of Leader Competence

Those organising, leading or supervising visits or activities must be competent to do so. The EVC must assess competence, taking account of their staff's or volunteers ability to lead, manage and control the children or young people partaking in the visit. Competence on specific activities may also be necessary, as well as knowledge of the venue being visited.

OEAP sets a clear standard to which The Trust leaders must work. The guidance states:

*“a competent Visit /Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:*

- *Knowledge and understanding of their employer's guidance supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.*
- *Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.*
- *Knowledge and understanding of the group, the staff or volunteers, the activity and the venue.*
- *Appropriate experience*
- *In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.”*

***Staff or volunteers participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff or volunteers. Establishments should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies. A Visit Leader Checklist forms Appendix A of the policy.***

Where a Volunteer Helper is a parent (or is a closely related to a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the risk assessment process.

OEAP Visit Leader Training is strongly recommended for all Trust employees who lead LOtC activities. Currently there is no revalidation requirement however, to meet LOtC guidance requirements regarding leader competence; leaders must be current in their knowledge of expectations of good practice, so update refresher training is also strongly recommended.

Refer to OEAP document [Assessment of Competence](#)



## 12. Charges for Off-site Activities and Visits

Headteachers/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996. The Trust's Charging & Remissions Policy should be adhered to.

## 13. Vetting and DBS Checks

The Trust's employees who work *frequently* or *intensively* with, or have *regular access* to young people or vulnerable adults, must undergo an enhanced DBS check as part of their recruitment process.

For the purposes of this guidance:

- *frequently* is defined as "once a week or more";
- *intensively* is defined as 3 times in a 30 day period or overnight (2am - 6am).

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

The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that an overview based on a common sense risk-benefit assessment process has been considered.

Sefton's recommendation to schools for trainee teachers on placement is that they only accept DBSs obtained through the university or college for where the organisation has signed up to say that they will share our criteria to operate to certain minimum standards. (The practice of using a DBS obtained through another organisation is known as portability. Currently the DBS do not endorse this practice.)

Refer to OEAP document: [Vetting and DBS Checks](#)

## 14. Requirement to Ensure Effective Supervision

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is "effective".

The Trust has a responsibility to ensure there is an appropriate level of supervision at all times for all visits and that such supervision is effective. This must have been approved by the EVC and Head of Establishment and, where applicable, in accordance with Governing Body policy.

Effective supervision should be determined by proper consideration of:

- age (including the developmental age) of the group;
- gender issues;
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions,
- staff or volunteer competence.

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

Particular consideration should be given to the additional implications that may arise if staff or volunteers are to be accompanied by family members (or partners) on visits.

Refer to OEAP document [Ratios and Effective Supervision](#)

Refer to OEAP document [Group management and Supervision](#)

## **15. Preliminary Visits and Provider Assurances**

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information is a vital dimension of risk management.

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

Examples of such schemes include:

- The LOtC Quality Badge
- AALS licensing
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

The Sefton nominated adviser takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

If the provider does not hold a recognised accreditation, the establishment must ask the provider to complete and return an Independent Provider's Questionnaire.

Refer to: OEAP document [Preliminary Visits and provider Assurances](#)

## **16. Insurance for Off-site Activities and Visits – RPA (Risk Protection Arrangement via DfE)**

Employer's Liability Insurance is a statutory requirement and The Trust holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it.

The policies extend to cover volunteers acting under the direction of and supervised by Trust staff.

Some level of Personal Accident Insurance is provided for all Trust employees in the course of their employment, providing predetermined benefits in the event of an accident.

Visit and Activity leaders should contact the Trust's Director of Business & Finance to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover with the tour provider.

The policies below consider claims where the Trust is considered by the claimant to be at fault and the claimant wants compensation. However for overnight stays or appropriate day trips the Trust's liability insurance policies do not provide sufficient cover on their own. Group Leaders must therefore give consideration to the following 3 types of insurance cover and satisfy themselves that adequate cover is in place:

## **17. Travel and Personal insurance Group Policy**

This covers risk such as cancellation, medical expenses, loss of money, and loss of personal effects, business equipment, and personal accident. When travelling abroad Visit Leaders must carry an Injury & Travel Assistance Card supplied by the insurer. Visit Leaders should ensure that any hazardous activities are covered by the Insurance Policy used.

- Business Car Insurance
- Liability Cover

When using an external provider they must have Public Liability Insurance in place with a minimum limit of £5 million. If the provider is negligent i.e. it is their fault that an injury occurs any claim for compensation would be directed at the provider.

## **18. Inclusion and the Equality Act 2010**

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

Establishments should take all *reasonably practicable* measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in establishment policy, thus ensuring an aspiration towards:

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

The Headteacher, EVC and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Equality Act 2010, it would be discriminatory to:

- treat a disabled young person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

Staff must be aware of appropriate language and behaviour towards children and young people from diverse backgrounds.

Refer to OEAP document [Inclusion](#)

See also documents [SEND](#)

## **19. Adventure Activities Licensing Regulations**

The Headteacher, EVC and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Adventure Activities Licensing Authority (AALA) is the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

Government have agreed to abolish the License scheme and HSE are proposing to replace it with a code of practice. HSE assumes that there will be no change in standards of safety in this sector because the requirements of the current licensing regime are based on those in the Health and Safety at Work etc Act 1974 and the associated H&S management regulations.

Leaders should be aware that the AALS license is only an assurance of safety and it does not accredit educational or activity quality.

Refer to OEAP document [Summary of Adventurous Activity Licensing Regulations](#)

## 20. Transport

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

The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

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

Refer to OEAP document [Transport: General Considerations](#)

Refer to OEAP document [Transport in Minibuses](#)

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures. HCC Form OV7D is available for this purpose.

Refer to OEAP document [Transport in Private Cars](#)

## 21. Contacts

<b>Trained Educational Visits Co-ordinator (EVC)</b>	EVC: Mrs Kathrine Hogarth (GHS) EVC: Mrs Barbara Witherup (SHS) EVC: Miss Christina Jackson (KEW) EVC: (MHS)
<b>Offsite Visits Adviser/Health &amp; Safety Coordinator &amp; Advisor</b>	Anne Mason 0151 934 3652 anne.mason@sefton.gov.uk
<b>Travel &amp; Personal Insurance Group Policy</b>	RPA
<b>EVOLVE</b>	www.seftonvisits.org.uk

### Related Documents

- HSE's [School trips and outdoor learning activities – Tackling the health and safety myths](#) (06/11)
- [DoE Advice on Legal Duties and Powers for Local Authorities, Head Teachers, Staff and governing Bodies \(4/7/11\)](#)

**Appendix A: Southport Learning Trust - Visit Leader Check List**

**This checklist is based on guidance from Outdoor Education Advisers' Panel (OEAP).**

- I have met all requirements of the Trust's Educational Visits Policy relevant to the visit.
- I am confident to lead the visit and have the specific competence to do so, and have been judged so by my Headteacher / Educational Visits Co-ordinator (EVC) in line with the Trust's requirements.
- I have planned and prepared for the visit, involving staff and young people in the planning and risk management process to ensure wider understanding. All details of the visit have been entered on EVOLVE.
- I have kept my EVC informed at each stage of the planning process.
- I have undertaken a preliminary visit if appropriate.
- I have defined the roles and responsibilities of other staff (and young people) to ensure effective supervision, and have appointed a deputy.
- I have shared details of 24/7 emergency contacts and emergency arrangements with key staff.
- I have obtained parental consent forms (where required), medical details and contact details and these have been copied and shared with relevant staff and providers. I have read all Individual Health Care Plans of pupils participating in the visit and taken actions to ensure their medical condition is supported
- I have checked whether insurance arrangements are adequate.
- If accompanying leaders take a family member on a visit, there are adequate safeguards to ensure that this will not compromise group management.
- Child protection issues are addressed, including DBS checks and processes where appropriate.
- I have disseminated relevant information to supporting staff.
- There is access to first aid at an appropriate level.
- Relevant information has been provided to parents and young people, and pre-visit information meetings have been arranged where appropriate.
- All aspects of the visit (both during and after the event) are evaluated.
- Staff and other supervisors have been appropriately briefed on:-

The nature of the group, including age, health characteristics, capabilities, special educational needs, likely behaviour and any other information relevant to the planned activities.  
The nature and location of the visit.

- The visit is effectively supervised - staffing ratios meet requirements of good practice.
- Staff/volunteers and third party providers have access to emergency contact and emergency procedure details.

**I have read and understood the Visit Leader Checklist.**

**Signed (Group Leader):** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signed (EVC):** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Appendix B: Administration Checklist for Trips and Events**

Please use this form to assist with visit planning, calculations and bookings.

**Please:-**

- Seek permission with Headteacher of school for the visit to take place.
- Read and understand the Trust Educational Visits Policy and Group Leader Visit Checklist
- Confirm date and inform EVC so it is entered on the school calendar to avoid double booking.
- Decide who is funding the visit? (Parents/ Pupil Premium/Cost Centre).
- If required give transport details to Finance to get quotes - transport request form available from Finance.
- Complete costings in conjunction with the Headteacher.
- Check payment deadline date does not clash with any other payment deadlines - see Finance.
- Write permission letter - letterhead template and standard wording available from Mrs Hogarth or Finance.
- Please ensure letter is signed by trip organiser and Headteacher.
- Once copied please ensure the Finance Office, EVC and the Front Office have spare copies and an electronic copy goes on the VLE.
- Please ensure Finance Office is aware and have a copy of the letter **before** it goes out to pupils so it can be put on ParentPay if applicable.
- Please ensure all invoices are forwarded to Finance.
- Work with the EVC to enter all visit details on EVOLVE which is our online Health & Safety Risk assessment.

**Name of Organiser:** \_\_\_\_\_

**Insurance Provider:** \_\_\_\_\_ (school/travel company)

**Event/Trip destination:** \_\_\_\_\_

**Date of Event/Trip:** \_\_\_\_\_

**INCOME**

No. of pupils: \_\_\_\_\_ @ £ \_\_\_\_\_ per pupil = £ \_\_\_\_\_

No. of staff: \_\_\_\_\_ @ £ \_\_\_\_\_ per person = £ \_\_\_\_\_

Other (e.g. subsidy from Deputy Head/Pupil Premium): \_\_\_\_\_ = £ \_\_\_\_\_

**ACKNOWLEDGEMENT – PLEASE SIGN AND KEEP FOR YOUR RECORDS**

This is to acknowledge that I have received my copy of the ‘School Health and Safety Handbook’ and have been given an orientation as to its contents.

I have read and will abide by all the rules and regulations in the Handbook, together with any additional safety rules and regulations relating to my job.

Signed ..... Dated .....

Job Title .....

**ACKNOWLEDGEMENT – PLEASE SIGN AND RETURN TO EVC**

This is to acknowledge that I have received my copy of the ‘School Health and Safety Handbook’ and have been given an orientation as to its contents.

I have read and will abide by all the rules and regulations in the Handbook, together with any additional safety rules and regulations relating to my job.

Signed ..... Dated .....

Job Title .....