

Guidance for Educational Visits and Off-site Activities – see also Educational Visits Policy

June 2018



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1. Introduction

- 1.1 Bolton Council (the Local Authority) recognises the value of educational visits for young people and fully supports and encourages those that are well planned and managed. This document provides advice and practical guidance to establishments buying into and using the EVOLVE system via the LA health and safety team Service Level Agreement.
- 1.2 The LA (Local Authority) uses the web-based system 'EVOLVE' to facilitate the planning, management, approval, and evaluation of visits. All staff that lead or accompany visits can access their own EVOLVE account, which is set up by their establishment's Educational Visits Coordinator (EVC).
- 1.3 To assist users, this guidance provides links to external agencies which offer additional topic specific direction. For example advice issued by technical advisors; the OEAP (Outdoor Education Advisors Panel) or Enforcement Agencies; for example the HSE (Health & Safety Executive). ***However the Council is not responsible for and cannot guarantee accuracy of information on sites that it does not manage; and inclusion does not mean the Council endorses the linked site.***

2. Responsibilities

The Health and Safety at Work Act 1974 places overall responsibility for health and safety on educational visits with the employer:

- For community schools, community special schools, voluntary controlled schools, maintained nursery schools, and statutory youth groups, the employer is the LA. These establishments will automatically enter into/and pay for the educational visits Service Level Agreement (SLA). They must adopt and follow this guidance document however, if they choose to opt out of the SLA, establishments must ensure that their own systems are equal to or better than those of the LA.
- For academies, foundation schools, voluntary aided schools and Pupil Referral Units the employer is usually the governing body or proprietor. Although welcome to do so, these establishments are not obliged to use the guidance of the LA. If the establishment has bought into the Educational Visits SLA then they must adopt and follow the LA Guidance.

2.1 Role of the Health and Safety Team

The Health and Safety Team provide advice and guidance to schools/establishments regarding the planning and risk management of educational visits. In particular the team are responsible for reviewing and providing advice on specific visits, e.g. adventurous, residential and overseas.

2.2 Role of the Head teacher/Head of Establishment

Responsibility and accountability within the school for the approval of educational visits remains with the Head teacher or the Head of the Establishment. The OEAP provides guidance on some of the expected roles/ responsibilities.

<https://oeapng.info/head-manager/>

2.3 Role of the Educational Visits Coordinator

To help establishments fulfil their health and safety responsibilities for visits, an Educational Visits Coordinator (EVC) must be appointed who will support the Head of Establishment. (In small establishments the EVC may also be the Head of Establishment). The EVC should be competent, ideally with practical experience in leading and managing a range of visits similar to those typically run. The OEAP provides guidance on some of the expected roles/ responsibilities.

<https://oeapng.info/evc/>

2.4 Role of the Group/Visit Leader

The Group/Visit Leader must be an employee of the establishment and not a volunteer. They will have the overall responsibility and accountability for the supervision and conduct of the visit. The key requirement for a Group/Visit Leader is that they are competent to lead that particular visit e.g. with appropriate knowledge and experience. The OEAP provides guidance on some of the expected roles/ responsibilities.

<https://oeapng.info/download/1124/>

3. Approval and Outcomes

Approval is delegated to the Head of Establishment for all visits; however the following types of visit are then submitted to the LA for further review and guidance.

- Overseas
- Residential
- Those involving an adventurous activity – examples listed in Section 20.

These visits must be 'authorised' within the establishment and submitted to the LA for. All visits are sent to the LA **must be submitted at least 4 weeks** before start date of the visit. This will allow time for clarifying/-resolving any issues that may arise. The LA may not have sufficient time to review visits submitted within 4 weeks.

4. Visit Planning, Plan Bs and Inclusion

All school trips should be planned so that hazards are identified and adequately controlled - this should be proportionate to the level of risk.

We recommend that planning should be completed by splitting the trip into 3 stages.

- Before (development stage),
- During (to take account associated risk, changes or issues) and
- Trip evaluation after the trip (to capture best practice/lessons learnt for future trips)

What is a Plan B?

A Plan B is an alternative activity that can be used if for safety reasons you need to change your plans or activity – it is not an emergency procedure. A plan B might mean doing the same activity at a different location, on a different day or completing a different activity altogether. Be prepared to move to Plan B before or even during the current activity. If you visit a place regularly or when gaining information about a visit you might gather information which will help you to identify *cut-off criteria*. These are signs that circumstances have changed such that you need to move to Plan B. Examples might include a river or tide having risen above a certain point. It starts to snow heavily as you start a walk across lowlands. Being told that there has been an outbreak at a place you intend to stay. It is prudent then to include plan Bs within the planning process where appropriate, e.g. where weather conditions or water levels might be critical, or you are completing a trip where the weather may be unpredictable. It is good practice to involve accompanying staff in the planning and organisation of visits, as in doing so they will make more informed decisions and will become more 'risk aware'.

The OEAP provides comprehensive advice to establishments planning visits;

<https://oeapng.info/downloads/policies-planning-and-evaluation/>

Inclusion

Establishments must ensure that pupils with additional needs, e.g. physical/behavioural are not excluded from educational/off-site visits and that any reasonable adjustments are considered as part of the visit/planning process. Where it is deemed necessary record how you will manage the needs of students by completing a Pupil Based Risk Assessment (PBRA).

5. Preliminary Visits and Visit Safety

Wherever reasonably practicable, it is good practice to carry out a preliminary visit to any unfamiliar facility or venue. Visit leaders must thoroughly research the suitability of the venue and check that facilities and third party provision will meet the group's needs and safety adequately managed. Visits and research will help you plan how your trip should be managed and will help you decide upon supervision levels.

OEAP provide further information on the use of external providers and facilities.

<https://oeapng.info/download/1158/>

6. Parent / Carer Consent

The LA follows Department of Education Guidance regarding consent for school trips/visits and highly recommends establishments to do the same.

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/335111/DfE_Health_and_Safety_Advice_06_02_14.pdf

Establishments may therefore make use of an annual consent form for activities take place during school hours and are a normal part of a child's education at school. However, parents should be told where their child will be at all times and of any extra safety measures required.

Written consent should be requested for activities that need a higher level of risk management or those that take place outside school hours.

Establishments must ensure that they have a procedure in place to deal with circumstances where parental consent is not obtained or is withdrawn. This information could be recorded in your own educational visits policy.

7. Staffing and Supervision

Effective supervision is required for all visits: the visit leader, EVC and Head of Establishment must decide what supervision levels are needed by considering:

- The age, maturity and needs of individuals within the group, including those with additional needs;
- The type of visit and duration;
- Planned activities, including remote supervision and downtime;
- The experience and competence of staff and other adults.

A visit must not go ahead where the visit leader, EVC, or Head teacher is not satisfied with the levels of supervision.

The OEAP provide further detailed guidance to help you decide on supervision levels
<https://oeapng.info/download/1142/>

Ratios for Early Years are specific and must be adhered to, see [EYFS Statutory Framework](#)
We have provided a table of suggested **minimum** supervision ratios but these should be regarded as starting points for consideration and discussion rather than being definitive.

	School years 1 - 3	School years 4 - 6,	School years 7 onwards,
Suggested minimum staff/student ratio for a relatively straightforward activity where the group has no additional needs	1:6	1:10/15	1:15/20

(Source: oeapng.info/1485-ratios-and-effective-supervision)

Without special safeguards or control measures, these ratios will not be adequate to meet the needs of most residential or more complex visits.

Staff assigned to support the special needs of an individual cannot be included in the overall staffing ratio and their responsibility should not include the wider group.

8. Staff accompanied by their own children/family members

If staff wants to include their own children or family members on a trip/visit then approval must be sought and given in writing by the Head of Establishment. The trip risk assessment must include the arrangements and control measures to manage any additional hazards/risks and foreseeable issues this may cause. If the trip is sent to the LA for the approval letter must be added to EVOLVE so that the Practitioner can review relevant aspects of the assessment.

We strongly advise that children of persons staffing the visit should only be included if they are of similar age and/or ability as the other participants however the decision and overall accountability lies with the Head.

The Head of Establishment must consider that a staff member who is also acting as a parent may have divided loyalties and demands upon their time, especially in an emergency. Here staffing ratios will need to be adjusted to take this into account.

9. Indirect/remote supervision

Young people must be supervised throughout all visits. There are certain times where pupils maybe 'remotely supervised' by a member of staff or other responsible adult, e.g. DofE expeditions, 'down time' in a shopping centre, night time etc.

The OEAP provides comprehensive guidance to schools regarding supervision. This will help you ensure you have the right procedures in place.

<https://oeapng.info/downloads/download-info/4-2a-group-management-and-supervision/>

10. First Aid

It is good practice for a first-aider (e.g. Emergency First Aid/ First Aid at Work (FAW) qualification) to be included on educational visits, this can help to ensure that first aid (if required) is promptly administered. As part of visit planning, the group leader must make a judgement on

The level of first aid required; e.g. considering the number of pupils travelling, medical conditions, the location, type of activities, The extent to which the group will be isolated from the support of the emergency services (both in terms of distance and response time). if a first aider is not part of the visit, consideration must be given to where first aid will be accessed if required and first aid controls measures must be recorded in the visit risk assessment.

Where a young person at known risk of anaphylaxis accompanies a school visit, the leadership team should be familiar with the Department of Health "Guidance on the use of adrenaline auto-injectors in schools" available at:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/645476/Adrenaline_auto_injectors_in_schools.pdf

Procedures must be put in place to meet the requirements of this document.

A 'suitably stocked' first- aid kit should be available for all visits. It is a legal requirement for public service vehicles. The first aid requirements relating to EYFS settings are specified and must be adhered to.

[*Statutory Framework for the Early Years Foundation Stage*](#)

11. Insurance

It is the responsibility of the Head Teacher/Governing Body/Service Manager to ensure they have appropriate travel insurance to cover all aspects of educational/off site visits. Any queries with regard to the suitability of your insurance cover should be addressed direct with your insurance provider.

12. Transport

Private Cars

Transporting young people in private cars requires consideration, must be approved by the Head of Establishment and processes recorded and communicated. Procedures could include gathering;

- Evidence of a valid insurance policy covering the intended use, e.g. business use,
- Evidence that the vehicle is roadworthy. e.g. valid MOT certificate where relevant,
- Proof that parental consent has been obtained to transport pupils in staff private cars,
- Information to show staff/drivers fully understand their duty of care in this situation. (Including correct installation/use of child restraints/car seats).

Coaches

Coach selection is an important part of your journey. You may want to consider the following to help you do this;

- Does your establishment have an existing, satisfactory relationship with a provider? Do not underestimate intuition – if your establishment has used a provider before and always felt safe, listened to and well cared for then this is a good reason to use them again.
- Can the operator cope with any special needs your group may have? how will they do this?
- Are the seat belts appropriate for your group and is there, if necessary, appropriate access and securing facilities for a wheelchair?
- Where a provider has a fleet of coaches of varying sizes and standards, confirm the specific standard or vehicle you require.
- Ensure the chosen coach company will not subcontract to another company without your agreement
- Check Operator licences. <https://www.gov.uk/check-vehicle-operator-licence-applications>
- Confirm DBS, public liability and employer liability insurances

Minibuses

Schools/establishments that own or hire a minibus must have an operational policy in place for this.

Combined Department for Education and Department for Transport provide clear advice on when a school employee with a car driving license may drive a minibus and when a section 19 permit might be required. Schools must ensure that this guidance is followed and relevant checks are made to establish the procedure is followed

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/494266/Driving_school_minibuses_and_advice_for_schools_and_local_authorities.pdf

Staff can confirm details of the vehicles they can drive by using the link provided by government online (Gov.uk)

<https://www.gov.uk/view-driving-licence>

13. Weather, Clothing & Survival

Where appropriate, the visit leader must obtain and act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate to:

- The time of year, prevailing weather conditions, altitude and exposure to elements,
- Likely changes in weather,
- The experience, age and ability of the party;
- The nature of the visit and environment.

When travelling away from immediate help, visits leaders should consider the need for:

- Comfort, insulation and shelter for a casualty and the whole group
- Provision of emergency food and drink,
- Torch,
- Possible need of signalling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas);
- Sun cream.

Certain activities e.g. Duke of Edinburgh may require visit leaders to take additional safety / rescue or survival equipment. This should be considered as part of the visit risk assessment.

Visit leaders must have the confidence and ability to identify circumstances where it may be necessary to modify or change the visit or activity (implement Plan B) to suit changing

situations, or additional risk e.g. inclement weather, rising water levels, accident or incident etc.

The OEAP provides guidance on weather, clothing and other considerations specific to trip types. <https://oeapng.info/guidance-documents/>

14. Using an External Provider

There are many external providers in the UK and abroad offering/providing a range of adventurous activities, instruction and supervision, for example:

- Activity Centre, e.g. PGL
- Educational Tour Operator (offering skiing, tours, historical sites and other opportunities)
- Overseas Expedition Provider.

The decision to use an external provider is the responsibility of the visit leader, EVC and Head of Establishment. To help schools/establishments confirm that the provider has suitable systems and procedures in place they must ensure that the Provider holds an LOtC Quality Badge, an AALA Licence **OR** a 'Provider Form' has been satisfactorily completed by the provider.

14.1 For Providers that hold a current LOtC Quality Badge and/or an AALA Licence

The visit leader should not risk assess activities delivered by an external provider it is the providers responsibility to do this. However visit leaders should;

- Confirm risk assessments are in place for the activities completed by students, risk assessments for the location/premises, and where the provider is responsible the travel arrangements. Also consider first aid cover, fire safety etc.
- Establish the times during the activity when school staff would be responsible for student care/safety (so they can risk assess those elements)
- Ensure that they are aware of the roles of staff accompanying the trip whilst the activity sessions take place.
- <http://www.hse.gov.uk/aala/index.htm>

14.2 For Providers that **DO NOT** hold an LOtC Quality Badge and/or an AALA Licence

A provider form will help you confirm that the company you are using to provide services on a trip/visit has health and safety procedures / risk assessments in place.

Procedure

1. Download a [Provider Form](#) from EVOLVE.
2. Complete the top section.
3. Send Provider Form to the provider (email, fax, post).
4. On its return check that it has been satisfactorily completed.
5. Keep Provider Form on file together with all other relevant documentation.
6. Attach the Provider Form to EVOLVE.

Follow the guidance in section 14.1 regarding the risk assessment of activities

15. Emergency Procedures

Schools/establishments should ensure emergency procedures are in place and documented within their educational visits policy.

OEAP provides guidance to schools to help them develop their offsite Emergency Procedures <https://oeapng.info/download/1136/>

In an emergency, if it is not possible to reach any of the designated establishment emergency contacts, the leader should call the LA's 24 hour emergency number 01204 336900.

16. Water- Margin Activities

Water-margin activities are those that take place near or in water such as such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow water (knee deep. Whilst LA approval is not required for such activities.it is important that the establishment takes into account the experience and competency of the leader. Please note activities that involve swimming and other activities will require LA approval and additional safeguards will need to be in place. Staff involved in water-margin activities should be familiar the guidance contained within Group Safety at Water Margins. This document is available on EVOLVE.

17. Residential Visits

Residential visits require approval by the LA and must be submitted to the team at least 4 weeks prior to travel

As part of visit planning, visit leaders must ensure accommodation is suitable for all pupils and staff. Pupils/staff must be made fully aware of the establishment's emergency evacuation plan and should complete a "walkthrough" of the evacuation route after arrival. If staff or need support in the event of an evacuation a Personal Emergency Evacuation Plan. (PEEP) must be developed and shared with relevant persons and the establishment as they may need to have input)

18. Overseas Visits

Residential visits require approval by the LA and must be submitted to the health and safety team at least 4 weeks prior to travel.

The visit leader must consider the relevant country information from the Foreign and Commonwealth Office website: www.fco.gov.uk . All relevant FCO information must be shared with staff accompanying the visit.

19. Swimming

The use of a pool should be clearly identified as part of your visit planning, never a spontaneous decision. Swimming activities and venues must be included within the visit risk assessment and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example, were a hotel pool may be available.

Staff would need to confirm

- Pool risk assessments are in place – including supervision/lifeguarding
- Level of lifeguarding offered, qualifications held by staff

OEAP provides guidance relating to supervised / unsupervised swimming and the hazards that should be considered as part of your risk assessment.

<https://oeapng.info/download/1234>

Where there is no lifeguard on duty the head of establishment/ visit leader will be fully accountable and responsible for ensuring relevant guidance is followed, information from the venue is gathered and the activity risk assessed this information must be added to EVOLVE and LA support requested.

Natural Water Bathing / open water bathing

Taking young people on a trip to the seaside or other open water in good weather, could be an important part of a trip or visit where planned. A balanced approach will ensure that the risks are properly managed so that young people are given these opportunities

<https://oeapng.info/download/1224/>

20. Definition of an ‘adventurous activity’

The following activities are examples of adventurous’ activity which should be sent to the LA to review so we can provide advice/guidance relating to the risk management of your trip. This list is not exhaustive and if you think that your activity is adventurous and it is not listed below then please contact the team or the relevant professional body

- Climbing:** Rock climbing, abseiling, ice climbing, gorge walking, ghyll scrambling, indoor climbing walls, Coasteering/coastal scrambling, sea level traversing, high- and low-level ropes courses
- Watersports:** Canoeing, kayaking, dragon boating, wave skiing, white-water rafting, improvised rafting, sailboarding, windsurfing, kite surfing Snorkel and aqualung activities, boating (excluding commercial transport) Swimming (all forms, excluding publicly lifeguarded pools) and activities with the Use of powered safety/rescue craft
- Trekking:** Hill-walking, mountaineering, fell-running, orienteering, pony trekking, off-road cycling and off-piste skiing
- Caving:** Caving, pot-holing, mine exploration
- Challenges and Skills:** Archery, shooting, quad bikes, assault courses, camping, snow sports (skiing, snowboarding, and related activities, including dry slope), air activities (excluding commercial flights), motor sport and all forms of extreme sports

For the purposes of LA review, the following activities may not be regarded as adventurous (dependant on the extent of the activity and your risk assessments). However, these activities must be supervised by a member of staff who has previous relevant experience and who in the opinion of the EVC and Head of Establishment is competent to supervise the activity:

- Walking in parks or on non-remote country paths
- Field studies - unless in the environments stated in 'open country'
- Swimming in publicly lifeguarded pools
- Theme parks
- Tourist attractions
- Pedal go-karts
- Ice skating (rink)
- Farm visits
- Local traffic survey
- Museum, library, etc.
- Physical Education and sports fixtures (other than the above)
- Water-margin activities as defined in [Section 22](#)
- Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy.

Speak to the LA if you need further advice/guidance.

21. Approval of staff to lead an adventurous activity

Procedure for obtaining approval

If establishment staff are to lead adventurous activities, then it is essential that they are properly assessed as competent to do so. The Head of Establishment is responsible for confirming competence to lead as they are accountable. Staff wishing to lead an adventurous activity must provide details of relevant experience/training/qualifications along with full details of the proposed activity. The Head teacher/EVC must be confident that they have sufficient competence to lead the activity before submitting the trip/activity to the LA. Approval should never be assumed but must involve professional judgement. The Head/Manager or EVC (when the responsibility is delegated) must make a judgement about the suitability of that person to lead that group on that visit/activity in that environment. OEAP guidance can help you determine if your staff have relevant qualifications/experience or you may need to speak to the relevant awarding body.

Assessment of competence

<https://oeapng.info/downloads/download-info/3-2d-4-4a-assessment-of-competence/>

Qualifications and FAQs

<https://oeapng.info/2513-adventure-activity-qualifications/>

<https://oeapng.info/downloads/download-info/6h-fags-adventure-activity-qualifications/>

<https://webcommunities.hse.gov.uk/connect.ti/adventureactivitiesnetwork/view?objectId=582565>

Details of your assessment/approval and scanned copies of all relevant qualifications (e.g. instructor certificates, first aid, etc.) must be uploaded onto EVOLVE. Approval for any visits which are classed as “adventurous/staff led” will not be given without the Head of Establishments formal approval being in place on EVOLVE.

A step by step guide how to gain Leader Approval is held on evolve, under resources, section named “Validation of staff awards”. This will describe how to complete the Leader Approval criteria. The LA will give final approval for the activity to take place and will acknowledge the approval given for the individual to lead trips.

22. Water-Based Activities (Watersports)

For clarification between water-margin and water-based activities see Section 16.

UK providers should hold relevant licence (AALA)

The activity leader must establish the level of water confidence for all participants prior to starting any water-based activity. Participants who lack water confidence may still be able to take part subject to discussion with the provider and risk assessment/approval from the Head teacher.

If a member of staff wants to lead this type of visit they must seek approval. See section 21.

The activity must be fully risk assessed and if required personal buoyancy provided

The school must provide sufficient information to parents on the nature of the activity.

23. Walking activities

For the purposes of EVOLVE, walking activities should be submitted to the LA if they are above 300m, or more than 1km from vehicular access. However, this is a subjective boundary and there may be occasions where Head teachers, EVCs or the visit leader may ask the LA to review a walking activity prior to it taking place. This may be due to risk or an individual’s medical needs. In this case the school/establishment may be asked to provide or gather further technical advice.

Where the establishment’s own staff intends to lead an open-country activity: the Visit Leader must seek approval from the head teacher providing full information of experience and qualifications including providing certificates. The EVC/head teacher must speak to the awarding body to confirm the qualifications are relevant and suitable for the route/activity

In many cases the awarding body will state that the visit leader must also hold a suitable/valid First aid certificate. This information should also be submitted to the LA. Governing Bodies <http://www.mountain-training.org/> or <https://www.thebmc.co.uk/>

24. Snowsports

Snowsports (e.g. skiing and snowboarding) are regarded as adventurous activities and the visit therefore requires LA approval.

The LA expects establishments to follow OEAP guidance regarding the planning, organising and delivery of any snow sports activity. Specific advice regarding staff qualifications and competence must also be followed. Head teachers must complete relevant checks to ensure staff have the ability to organise, and if appropriate instruct, lead and supervise.

A note of caution: - off-piste activities can be a very dangerous activity. People should never go on virgin slopes with avalanche risk. Off-piste activities must be risk assessed by the ski school and professional instructor at the time to determine if it is safe.

Previous similar experience is advised. <https://oeapng.info/download/1232/>

Schools must check any liability waivers with their insurers before submitting a visit.

25. Overseas Expeditions

Overseas Expeditions (for the purposes of this document) include those which involve journeying in remote areas of the world and/or in developing countries. The OEAP provides thorough advice on how schools should plan this type of visit.

<https://oeapng.info/1874-overseas-expeditions-guidance-revised/>

26. Contacts

EVOLVE	www.boltonvisits.org.uk
Health and Safety Team	01204 336968 chst@bolton.gov.uk
Insurance Department	01204 331515
LA Emergency Contact (24 hour)	Security and Response 01204 336900