



*Better Together*  
**LEARNING TRUST**

# Moving & Handling Policy and Procedure

(Includes moving and assisting people and moving and handling objects)

Document Reference:	NS 13
Date of Approval:	October 2025
Approved by:	Board of Directors
Version No:	V. 1
Last Review Date	September 2025
Next Review Date:	September 2027
Policy Owner:	Chief Operations Officer
Document History:	Version 1: September 2025

## **Glossary**

The term '**School**' is used as standard to mean the educational establishment that is adopting this policy.

The term '**Headteacher**' is used to refer to the person with overall day-to-day responsibility of the school.

**Directors** are the Trustees of the Board.

**LGB** is the Local Governing Body.

## **1. Purpose of Policy**

- To ensure legal compliance with manual-handling operations regulations, that services are delivered in line with assessed individuals' needs and contractual requirements, and that this is done in a safe and personalized matter using a robust risk assessment approach
- To ensure that BTLT has a systematic approach to determine the number of staff and range of skills required to meet the needs of the Individuals and always keep them safe
- Adherence to the policy will also minimize the risk of accidents and incidents to staff who are undertaking these activities at work by ensuring that suitable systems are in place to manage the risk
- To support BTLT in meeting the following regulations.
  - Personal Protective Equipment at Work (Amendment) Regulations 2022
  - Personal Protective Equipment at Work Regulations 1999
  - Lifting Operations & Lifting Equipment Regulations 1998 (LOLER)
  - Provision and Use of Work Equipment Regulations 1998 (PUWER)
  - Equality Act 2010
  - Health & Safety at Work Act 1974
  - Management of Health & Safety at Work Regulations 1999
  - Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 (RIDDOR)
  - UK GDPR
  - The Manual Handling Operations Regulations 1992 (as amended 2002)

## **Policy Statement**

This policy details how the Trust will support both staff and individuals with moving and handling requirements. It highlights the need for risk assessments and regular review of risks associated with moving and handling tasks and mirrors the Trust values:

- Respect
- Resilience
- Integrity
- Kindness
- Honesty

## **Policy Objective**

By implementing this policy, BTLT will support effective manual handling to:

- Ensure that best practice in the handling and moving operations is carried out by all staff

- Uphold the Individual's right to dignity, privacy, choice and respect
- Generate a culture that ensures that the employees' well-being is prioritised
- Advise managers and staff on the implementation of safe assisting and moving people and loads in their workplace
- Ensure that all relevant members of staff have had an up-to-date manual handling assessment completed
- Ensure that special consideration is given to new or expectant mothers, young workers, workers with ill health or a disability
- Ensure a consistent approach is used to establish safe staffing levels to support increased need for manual handling of students
- Ensure that lessons are learnt following near misses, accidents or incidents to ensure that the situation does not arise again
- By implementing this policy, BTLT will minimise manual handling injuries by:
  - Ensuring that the schools will put in place appropriate risk control measures
  - Providing the schools with appropriate information, guidance and support to enable them to develop risk reduction control measures
  - Involving staff who are involved in manual handling with the preparation of the risk assessment
  - Providing staff with information, instruction and formal manual handling training

### **Policy**

BTLT will comply with the Health and Safety at Work Act (1974) which requires them to provide 'such information, instruction, training and supervision as is necessary to ensure so far as is reasonably practicable, the health and safety at work of his employees'.

BTLT will ensure that its employees will 'take reasonable care for his or her own safety and the health and safety of other people who may be affected by his or her acts or omissions'.

As an employer, BTLT understands that it has a responsibility to:

- Avoid hazardous manual handling operations as far as is reasonably practicable
- Make a suitable and sufficient assessment of any hazardous manual handling operations that cannot be avoided, taking account of all factors:[?](#)
  - Task
  - Individual capacity
  - Load
  - Environment, and
  - Other
- Reduce the risk of injury from these operations as far as is reasonably practicable, using an ergonomic approach
- Ensure that employees understand clearly how manual handling operations have been designed to ensure their safety

Make allowances for any known health problems which might have a bearing on an existing employee's ability to carry out moving and handling operations. This should be done by examining

the employee's current job role to take account of any complexities (e.g. pregnant worker assessments), and where required, redesign tasks etc. to ensure the health, safety and welfare of the employee

Whilst BTLT acknowledges its responsibility for the health, safety and welfare of its employees and others affected by its undertaking, including Individuals, visitors, and contractors etc., employees have a duty to:

- Follow safe systems of work as directed by risk assessments, report any known defects in equipment and/or processes designed to make manual handling safer to them directly
- Attend and participate in any training given in moving and handling assessment principles
- Report any physical characteristics and/or injuries that may increase their susceptibility to suffering a musculoskeletal disorder (MSD)
- Report pregnancy or any medical condition that might affect their ability to handle loads safely
- Report any change in working conditions which may create movement and handling risks
- Report any significant change in the nature of the task or the load
- Use the equipment provided in accordance with the manufacturer's guidance and associated training, instruction, information and supervision
- Ensure that EHCP's are followed in relation to the number of staff required to assist an individual student
- Report any incidents involving manual handling immediately. This includes near-miss events

Heads of School have overall responsibility for health and safety in their school and will ensure that this policy is shared with all staff and implemented.

BTLT will:

- Avoid the need for employees to undertake any moving and handling operations which involve a risk of injury, so far as is reasonably practicable
- Ensure assessment of any hazardous moving and handling operations that cannot be avoided to reduce the risk of injury
- Introduce and implement appropriate measures to avoid or reduce risk by elimination of the risk, redesigning the operation or the introduction of mechanical aids where required ☒
- Record the assessments and communicate their findings to all staff involved
- Ensure that staff are adequately trained in the use of any equipment etc.
- Provide information, instruction, training and supervision for all staff in terms of appropriate moving and handling assessment principles
- Monitor and review moving and handling assessments when there is reason to believe that they are no longer valid due to a change in working conditions, the staff involved or a significant change in the moving and handling operations affecting the nature of

the task or the load. This may be identified through changes in legislation, best practice etc.

- Ensure that all moving and handling training is recorded
- Ensure that there is a system whereby staff can report feedback on safety arrangements and concerns regarding manual handling issues, and that these reports are recorded for monitoring purposes

Ensure that training records are kept and maintained, and are available for inspection by organisations such as the HSE, OFSED, etc.

- Monitor sickness absence records and ensure these are regularly reviewed to identify patterns and trends that can be used to identify if any such absences are directly or indirectly related to manual handling activities
- Ensure that, where staff have injuries, disabilities or conditions such as pregnancy, moving and handling constraints are considered in terms of the risk assessment process
- Ensure that individual risk assessments (where necessary) are on file, and liaise with health and safety professionals as appropriate

This policy statement includes ALL equipment. For the avoidance of doubt, this includes equipment that is either leased or owned by a third party but used by employees of BTLT. Staff will work in partnership with equipment owners, where required, to ensure compliance with equipment checks and maintenance.

## **Procedure**

### **Basic Principles of Manual Handling Objects**

The basic principles that everyone must observe prior to carrying out a manual handling operation:

- Ensure that the object is light enough to lift, is stable and unlikely to shift or move
- Heavy or awkward loads must be moved using a handling aid
- Make sure the route is clear of obstructions
- Make sure there is somewhere to put the load down wherever it is to be moved to
- Stand as close to the load as possible, and spread your feet to shoulder width
- Bend your knees and try and keep the back's natural, upright posture
- Grasp the load firmly as close to the body as you can
- Use your legs to lift the load in a smooth motion as this offers more leverage, reducing the strain on your back
- Carry the load close to the body with the elbows tucked into the body
- Avoid twisting the body as much as possible by turning your feet to position yourself with the load

### **TILEO Assessment**

One way to assess manual handling activities is to look at four specific areas – Task, Individual, Load and Environment (easily remembered by the acronym TILEO).

#### **T (Task) – Does the task involve:**

- Twisting or stooping?
- Strenuous pushing or pulling?

- Excessive lifting or lowering?
- Handling at a distance from the trunk?
- High task frequency without adequate rest periods?

**I (Individual Movers) – Do the people carrying out the tasks require:**

- Specialised training?
- Unusual strength or ability?
- A uniform or personal protective equipment?
- Consideration during impaired ability – for example, if pregnant?

**L (Load) – Is the person or object being moved:**

- Heavy or large?
- Unwieldy or difficult to grasp?
- Unpredictable or unstable?
- Vulnerable to injury or fragile?
- Sharp, hot or hazardous in any other way?

**E (Environment) – Does the area in which work is carried out have:**

- Restricted space?
- Slippery or uneven floors?
- Slopes, ramps or steps?
- Adequate levels of heat, light and ventilation?

**O (Other) – Final things to consider:**

- Is the movement or posture hindered by personal protective equipment, or
- Is there an absence of the correct PPE for the task?
- Is equipment involved, if so, is it clean, serviced, available and well maintained?

**Assessing Manual Handling Risks**

Legislation requires that all manual handling operations that may present a risk of injury, must be the subject of a risk assessment carried out by a competent person and using an ergonomic approach.

The purpose of a risk assessment is to:

- Identify all hazardous moving and handling tasks carried out at work and determine the likelihood and severity of any injury or harm arising from these tasks and to whom
- Assess all factors, including existing control measures, involved in the hazard using the TILEO analysis
- Identify control measures that will reduce the risk of injury to acceptable levels
- Identify all employees who may be at risk of injury from moving and handling tasks in the performance of their duties

**Types of Risk Assessment**

The three different types of risk assessment are:

**Generic Risk Assessment** - covering the whole office or work activities together with any locations visited by staff outside these sites as part of their duties. A generic assessment must be completed at least annually and more frequently if significant changes in equipment, workplace or staffing occur. The risk assessment is used to identify manual handling hazards and required control measures using the TILEO assessment.

**Individual Risk Assessment (Staff)** - to be completed for any member of staff whose capacity for moving and handling at work may be impaired. This would include staff who are pregnant, young workers or those with ill health or disabilities.

**Individual Risk Assessment (Students)** - individual's require risk assessment and handling plans, it is recognised that a specific assessment for each Individual is required. All these areas form the basis for both the assessment and the control measures that can be put in place to minimise risk and enable safe systems of work. The Individual Risk Assessment must be reviewed at least annually, or when circumstances change.

### **Risk Assessments**

Manual handling risk assessments are undertaken when:

- A handling task is unavoidable
- A new handling task must be carried out
- An accident or incident occurs involving a handling activity
- New equipment is introduced
- A handling task must be carried out in a new environment, (e.g. assisting someone in a wheelchair to go outside instead of just pushing the wheelchair over smoother internal flooring) or there are changes in the environment (e.g. a new carpet is fitted or new furniture installed etc.)
- A member of staff complains about shoulder, arm, neck or back pain or any other pain/injury attributed to handling activities at work
- New staff are appointed
- New staff are appointed who are under 18 years of age
- A member of staff informs you that she is pregnant or is returning to work following a pregnancy of at least 6 months
- A member of staff returns to work following a lengthy absence
- A handling task becomes too difficult
- The Individual's needs change

### **Capacity/Consent**

In line with current manual handling operations regulations, an Individual should (where practicable) be allowed to assist their own movement with care even where this may require extra staff to provide support to aid the Individual's independence.

### **Dependency Assessment**

Dependency tools can help decide how many staff members are required based on individual needs.

This assessment will identify the level of support the Individual requires and the number of staff required to provide that support.

### **Safe Support**

Any new staff must be introduced to the student by a staff member already familiar and known to the student, following a full induction and training. The existing staff members will brief the new member of staff and ensure they read the EHCP's.

### **Review/Audit**

EHCP's and risk assessments will be subject to regular review and audit to ensure they remain appropriate and fully meet the needs of the students. Any changes/amendments will be made and information shared with the staff team.

Individuals, staff, families and other representatives can request a review if they have any concerns, or ideas about how support may be improved.

### **Individual Risk Assessments**

The assessment must be person-centred and, where possible, involve the student in decisions about how their needs are met. This can reassure them about the safety and comfort of the equipment, and how it, and the methods used, will ensure their safety and the safety of staff. Record the risk assessment on the student file. Include detail on the student's moving and handling needs, and record:

- What the Individual is able and unable to do independently
- The extent of the student's ability to support their own weight and any other relevant factors, for example, pain, disability, spasm, fatigue, or tendency to fall
- The extent to which the student can participate and cooperate with transfers
- Whether the student needs assistance to reposition themselves or sit up when in their chair and how this will be achieved.
- Specific equipment needed including the type of specific handling equipment, type of hoist and sling, sling size and attachments.
- The assistance required for different types of transfer of the students, including the number of staff needed. Although hoists can be operated by one person, hoisting tasks require two staff to ensure the safe transfer of the student
- The arrangements for reducing the risk and for dealing with falls if the student is at risk
- A student's needs and abilities may change over the course of the day. Staff should understand the impact this may have on moving and handling practices.
- Some students may become upset or agitated when being moved. Other students, though willing to assist at the start of a maneuver, may find themselves unable to continue.

### **Managing a Falling Individual**

A student may fall due to illness, seizures, physical disability or the effects of medication, frailty or other causes. If this occurs when a member of staff is supporting a student, the member of staff must ensure they do not put themselves at risk of injury. The staff member may have to release any hold they may have on the student and support them to the floor in a controlled manner and as safely as possible to prevent further injury, such as the staff member falling on the Individual. The staff member may need to try to move obstacles out of the way to prevent an increased risk of injury to the student or themselves.

Individuals at risk of falling must have an appropriate falls care plan and risk assessment in place.

### **Manual Handling Aids**

- Mechanical handling aids can reduce the risk of injury when used correctly. Even simple aids such as trolleys, sack trucks and wheelbarrows can be used to move objects and reduce the likelihood of injury
- It is better to push rather than pull, and to use body weight and leg muscles to do the work. Make sure the load is kept under control, particularly on slopes
- In some cases, more sophisticated manual handling aids may be required, for example, hoists
- It must be remembered that, although the handling aids will eliminate many of the manual handling risks, their use will introduce others, and these risks must be assessed
- Any aids used need to be regularly checked to ensure that they are safe to use. Equipment, such as hoists, will need to be maintained by someone competent to do so and will need to have regular services carried out

### **Monitoring of Manual Handling Accidents, Incidents or Near Misses**

- Any manual handling injury or incident that occurs at work must be recorded and reported as soon as possible
- Any required remedial action to prevent a similar injury or incident must be undertaken immediately
- A log of the incident must be reported on MyConcern
- If the accident is deemed to be reportable under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 (RIDDOR), the Chief Operating Officer will submit the report to the Health and Safety Executive (HSE) on behalf of the school. Heads of School are responsible for providing the Chief Operating Officer with the details in a timely manner
- Following any such incident, risk assessments and work procedures including any care plans will be reviewed
- Accidents, incidents and near misses will be reviewed as part of continuous improvement

### **External Advice and Support**

Specialist advice on how to help an Individual with specific moving and handling needs may be required.

## **Learning and Development**

Heads of school are responsible for ensuring that all staff complete induction, mandatory, refresher training

## **Record Keeping**

All current health and safety related records must be retained by the Chief Operating Officer

- Records of risk assessments, training and other health and safety documents will be retained, either in paper or electronic format
- Those kept in an electronic format will be stored with suitable backup systems to safeguard against computer/systems failure
- Training records, risk assessments and health and safety policies and procedures must be retained in line with the Archiving, Disposal and Storing of Records Policy and Procedure and relevant legislation

## **Sharing Information**

The sharing of any information regarding students will be carried out following the UK GDPR, data protection policies and procedures of BTLT.

## **Manual Handling**

- For the purposes of this policy, defined as any transporting or supporting of a load by bodily force, either by pushing, pulling, carrying, moving, lifting or putting down. Load includes objects or people (ref. Manual Handling Regulations 1992). This will also cover restraint situations

## **Load**

- Includes any movable object or material supported manually or by tools or equipment. This definition includes people

## **Musculoskeletal Disorder (MSD)**

- MSD involves the muscles, tendons, joints and skeleton, particularly in the back, hands and arms with symptoms ranging from mild aches and pains to severe swelling and inflammation  
Hazard
- A hazard is anything that has the potential to cause harm (e.g. slippery floors, a frayed electric flex or a heavy load) Risk
- A risk is the chance that somebody will be harmed by the hazard and can be quantified as high, moderate or low depending on the severity and likelihood of an incident

## **Ergonomics**

- The study of the relationship between workers and their environment. Ergonomics can be used to assess the 'fit' between people, the work that they do and the things that they use

## **Safe Systems of Work**

Safe systems of work require risk assessment and analysis of all manual handling tasks undertaken, the individuals performing such tasks, the loads being handled, the environment in which handling takes place and the equipment available. Control measures are in place to reduce all such identified risks to acceptable levels will result in safe systems of work that can be recorded and implemented

## **Key Facts**

Professionals providing this service should be aware of the following:

- Manual handling equipment will be maintained correctly and checked every time before it is used, with a record made stating it has been checked
- Incidents involving manual handling must be reported to the HSE and if there is an injury to a student as a result.
- Staff must not undertake care alone or if there are insufficient numbers of staff available according to the identified number of staff required for the care. Staff will ensure that the safety and welfare of themselves and the students is paramount
- Where practicable, “no hazardous moving and handling” working environment will be encouraged and staff will report any concerns immediately to the Head of School
- The Head of School is responsible for ensuring that risk assessments and contingency plans are carried out on all unavoidable handling tasks carried out by staff
- The Head of School is responsible for ensuring that their staff have received appropriate information, instruction and training in safer manual handling techniques, and this will also include where there is a requirement for increased staffing to support individual students
- Manual handling risk assessments must be reviewed at least annually or more frequently if a situation changes, or if an accident, incident or near miss occurs

People affected by this policy should be aware of the following:

- You will be involved as far as possible in creating your manual handling risk assessment
- Advice and guidance will be sought when required from external professionals, such as our Health & Safety Consultants, to improve safety for staff and positive student outcomes