



# **Educational Visits Policy**

## **August 2024**

**Approved by Trust Board on: 14<sup>th</sup> October 2024**

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## Document History – Version Control

Version No.	Date	Author/s	Summary of Changes
1	September 2024	YMD Boon	New

## Policy Statement

The Trust and its schools believe that outdoor learning, off-site visits and learning outside the classroom are an integral part of the entitlement of every child to an effective and balanced curriculum. Appropriately planned visits are known to enhance learning and improve attainment and so form a key part of what makes the Trusts schools a supportive and effective learning environment. The benefits of pupils taking part in visits and learning outside the classroom include (but are not limited to):

- Improvements in their ability to cope with change and novelty.
- Increased critical curiosity and resilience.
- Opportunities for meaning making, creativity, developing learning relationships and practicing strategic awareness.
- Increased levels of trust and opportunities to examine the concept of trust (us in them, them in us, them in themselves, them in each other).
- Improved achievement and attainment across a range of curricular subjects. Pupils are active participant's not passive consumers, and a wide range of learning styles can flourish.
- Enhanced opportunities for 'real world' 'learning in context' and the development of the social and emotional aspects of intelligence.
- Increased risk management skills through opportunities for involvement in practical risk-benefit decisions giving them the tools and experience necessary to assess their own risks in a range of contexts.
- Greater sense of personal responsibility.
- Possibilities for genuine team working including enhanced communication skills
- Improved environmental appreciation, knowledge, awareness and understanding of a variety of environments.
- Improved awareness and knowledge of the importance and practices of sustainability.
- Physical skill acquisition and the development of a fit and healthy lifestyle.

The Trust and its schools fully recognises that learning outside the classroom helps to bring the curriculum to life as it provides deeper subject learning and increases self-confidence. It also helps pupils develop their risk awareness and prepares them for their future working lives. The Trust and its schools adopts the Outdoor Education Adviser's Panel (OEAP) National Guidance for all educational visits available at [www.oeapng.info](http://www.oeapng.info)

Signed

Headteacher  
Date: .....

Chair of Local Academy Committee  
Date: .....

## Employer Responsibilities

As employer the Trust and its schools meets its obligations to provide staff with guidance, training, and support in the following ways:

- a. Appropriate guidance.
  - The appropriate guidance for the management of outdoor learning, off site visits and learning outside the classroom is the OEAP National Guidance web site – [www.oeapng.info](http://www.oeapng.info)
- b. Training to support the guidance to ensure that it is understood.
  - For those involved in managing and leading visits the relevant training courses are:
    1. Educational Visit Coordinator (EVC) Training – Trust and its schools requires that EVC's be appropriately trained with the training refreshed at least every 3 years.
    2. Visit Leader Training – Trust and its schools requires that **all** employees who lead trips or visits of a residential nature (unless to an approved LoTC or AALA provider within the UK) or whereby they lead an adventurous activity to undertake this training prior to leading the visit.

*Note: Local trips within the School Learning Area (see appendix 1) or day trips to public access environments regularly visited by schools and residential visits to LoTC or AALA provider within the UK, may be led by competent staff who have not attended Visit Leader training on authorisation of the Headteacher.*

- c. Suitable systems and processes to ensure that those trained are kept updated.
  - For the purposes of day-to-day updating of information, EVCs and Visit/Activity Leaders are directed to the periodic news items and updates of OEAP National Guidance.
- d. Access to advice, support, and further training.
  - Where an employee experiences problems with finding the material, they are looking for, or require clarification or further help, guidance, or bespoke training, they should contact their appointed Education Visit Advisor, YMD Boon Ltd.

## Application

This policy covers any visit that leaves the school grounds, whether as part of the curriculum, during school time or outside the normal school day.

The Trust and its schools adopts the Outdoor Education Adviser's Panel (OEAP) National Guidance available at [www.oeapng.info](http://www.oeapng.info)

All staff are required to plan and execute visits in line with this policy and National Guidance. Staff are particularly directed to be familiar with the roles and responsibilities outlined within National Guidance.

## **Pupil/Student Behaviour**

Whilst wishing to provide opportunities, both educational and social, the school retains the right to refuse an individual pupil/student from participating in a visit. This could apply if he/she could not be trusted to behave in an acceptable manner, or where it was considered inappropriate for other reasons, such as a child who has misbehaved prior to the visit and it was felt wrong to reward him/her by allowing participation in the visit. Parents must be informed of the right to refuse pupil/students from participating in trips on the grounds of behaviour by each Visit Leader via the first letter informing parents of the trip. Prior to the trip pupils/students and parents will need to sign a Code of Conduct form for all residential trips.

The following paragraph must be used:

*Acceptance on this trip is subject to good behaviour and a satisfactory reference from the children's class teacher. Students who are poorly behaved will forfeit their right to attend. Any monies already paid will be refunded if they can be recovered without loss to the school. All other sums will be forfeited. Serious breaches of behavioural expectations on residential trips may result in pupils/students being collected and taken home (in the case of UK trips). Additional sanctions, depending on the nature of the breach may also be imposed. These sanctions include fixed term and permanent exclusion*

## **Roles and Responsibilities**

The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer.

As the employer the Trust and its schools must be informed all residential visits, foreign travel and any adventurous activities for example climbing, caving and water sports.

## **Local Academy Committee**

The Local Academy Committee has responsibility for monitoring of all visits. They must ensure that the Local Academy Committee has its' own systems in place to support this process: a named Governor rather than a group; an approval process for trips requiring Governor approval; dedicated discussion and review time at meetings.

See Outdoor Education Adviser's Panel National Guidance for the role of the Local Academy Committee <http://oeapng.info/governors/>

## **Headteacher**

The Headteacher has responsibility for the final approval and monitoring of all visits.

The Headteacher should ensure that the management of visits meets the regulations and guidance offered by the Outdoor Education Adviser's Panel National Guidance, Department for Education and others as well as conforming to the school's own Health & Safety policy

The Headteacher should ensure that the Local Academy Committee is kept appropriately informed and that arrangements are in place for the educational objectives of a visit to be

inclusive and that issues identified in exploratory visits have been satisfactorily resolved within the risk assessment

The Headteacher should ensure that staff have opportunities to undertake CPD relating to good practice and procedures, and where necessary to obtain formal qualifications.

See Outdoor Education Adviser's Panel National Guidance for the role of the Headteacher <http://oeapng.info/head-manager/>

### **Visit Leaders**

- Be approved to carry out the visit, suitably competent and knowledgeable about the school's, Trust policies and procedures
- Plan and prepare for the visit and assess the risks, with support from the EVC if required, including a pre-visit to the venue
- Define the roles and responsibilities of other staff and students and ensure effective supervision of what they do
- Agree with a senior member of staff for them to act as the Emergency Contact, should a trip be taking place outside of school hours, and ensure they have a full trip pack
- Obtain Headteacher/Deputy approval for the visit, and Local Academy Committee Members where appropriate, within the defined timescales for visit approval
- Have enough information on the children taking part in order to risk assess their suitability for the visit or specific activity
- Consider stopping the visit if the risk to the health & safety of the students is unacceptable and have in place procedures for such an eventuality
- Ensure the leaders have the details of the established Emergency Contact
- Ensure that all staff taking part in the trip are fully briefed, including on their own role and responsibilities
- Ensure that the use of any student, staff or parent information complies with the Data Protection Act 2018
- Enter details of the trip onto eVisit, ensuring it is updated as soon as any information changes
- Prepare and manage a trip budget, ensuring it is cost-neutral and includes a contingency and that any surplus funds are returned in equal measure to all contributing parents/carer

See Outdoor Education Adviser's Panel National Guidance for the Role of the Visit Leader - <http://oeapng.info/visit-leader/>

### **The School Education Visit Coordinator (EVC)**

- Liaise with the Outdoor Education Adviser where appropriate
- Be involved in educational visit management in order to ensure that that satisfactory risk assessments have been carried out
- Oversee the trip logging system, eVisit
- Be able to confirm that the leadership of the visit is appropriate and to check staff qualifications, this to include accompanying staff and volunteers
- To provide information on the training of leaders and other staff, and to provide support for staff and volunteers new to the visit
- Ensure DBS clearance is in place for all staff and volunteers

- To ensure that liaison with parents and obtaining consent are effective
- Ensure the school has robust emergency procedures in place and knows how to liaise with DDAT should an emergency occur
- Ensure that the school complies with the Trust's requirements for reporting incidents and accidents (including 'near misses')
- Support the Headteacher and Deputy in the management of and evaluation of educational visits
- Use and apply suitable record-keeping practices for both pupils/students and leaders off-site, with due regard to Data Protection legislation
- Learn from previous experience, recording successful practice, and be able to use them and move on
- Monitor and review what is going on, establishing a clear picture of current practice. Be able to both report on successes and set targets for improvement. Be ready to intervene where practice is incorrect or unsatisfactory
- Ensure that any use of pupil/student, staff or parent information complies with the Data Protection Act 2018

See Outdoor Education Adviser's Panel National Guidance for the role of the EVC.

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

### **Educational Visit Advisor Service (EVA)**

Visits and activities, listed below will be checked by an independent Education Visits Advisor Service (who should be deemed competent to provide advice and guidance) before the activity takes place – see page 6 of this policy detailing the process to be followed.

- overnight stays
- foreign travel
- adventurous activities
- Duke of Edinburgh Expeditions

The Trust and its schools obtain advice/support relating to Educational Visits from the Health and Safety professionals at YMD Boon Ltd.

The following visits will not fall under the remit of YMD Boon Ltd Health and Safety professionals.

- Visits where schools choose to directly lead and deliver adventurous activities i.e., school staff member leading a climbing activity, kayaking, skiing etc.

The Trust and its schools require all adventurous activities to be delivered by a LoTC/AALA badge/licence holder unless the LAC are informed and specific permission to deviate from this has been given by the CEO.

### **Preliminary Visits and Provider Assurances**

#### **Preliminary Visits**

The Trust and its schools require that all visits are thoroughly researched to establish the suitability of the venue and to check that facilities and third-party provision will meet group

expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people, it is a vital dimension of risk management. It is good management practice to carry out a preliminary visit. The following identifies the circumstances where preliminary visit is a requirement.

- Pre visit required for visits where there is a high complexity factor, and the visit has not happened previously.
- Additionally, required when visit is solely led by the school.
- Residential visits, visits abroad, exchange visits, adventure led by the school, staff all have aspects of complexity.

If the visit is led and managed by the provider, then a variety of approaches can reduce the need to pre visit.

Visit Leaders can take full advantage of the nationally accredited provider assurance schemes that are now available and assists to reduce bureaucracy – examples include: -

- The LOtC Quality Badge (Learning outside The Classroom)
- AALA licensing (Adventure Activities Licensing Authority)
- Adventuremark

The Trust and its schools takes the view that where providers hold one of the above accreditations, there should be no need to seek further assurances.

The OEAP National Guidance 4.4f – Assessing an adventure activity provider check list, 4.4h – using external providers and facilities and 8.1q – Provider Questionnaire - <http://oeapng.info/downloads/all-documents/> should be followed when undertaking pre visits and assessing providers.

## **Types of visits and approval**

There are four types of visits, for which the approval process is slightly different:

- 1. Visit / activities within the School Learning Area (see appendix 1) and which involve no more than an everyday level of risk.**

Visits that are part of the curriculum and take place during the school day do not require consent. Those that are not part of the curriculum or extend beyond the school day can be covered by blanket consent, but information will be provided to parents in advance, and they will have the opportunity to withdraw their child. These follow the learning area operating procedure (appendix 1).

***Schools will log these visits on the eVisit system.***

- 2. Day visits within the UK excluding adventurous activities**

Visit Leaders to gain outline permission for visit from Headteacher. Visit leader to collate and input information onto the eVisit system. All information must be uploaded prior to submitting to the EVC for approval at least 4 weeks in advance. Once reviewed by the EVC, final approval for the visit will be given by the Headteacher.



### 3. Residential visits and visits involving foreign travel.

Visit Leaders to gain outline permission for visit from Headteacher. Visit leader to collate and input information onto the eVisit system. All information must be uploaded prior to submitting to the EVC for approval at least 6 weeks in advance. Once reviewed by the EVC, the visit will be given outline approval by the Headteacher. Once outline approval has been given, the visit will then be scrutinised by the Educational Visits Advisor to ensure the visit complies with the OEAPNG after which final approval will be given by the Headteacher. The Educational Visits Advisor must receive the visit notification at least 4 weeks in advance of the visit occurring.

Third party providers who hold the LoTC quality badge/AALA or Adventuremark do not require further checks. Those who do not hold this accreditation should complete and return a provider form (NG document 8.1q provider questionnaire) <http://oeapng.info/downloads/model-forms-mind-maps-and-checklists/>. Returned questionnaires must be scrutinised by Visit Leaders.

### 4. Visits involving adventurous activities:

Visit Leaders must check if an activity provider holds either an AALA licence ([http://www.AALA.org.uk/AALA/provider\\_search.php](http://www.AALA.org.uk/AALA/provider_search.php)) or a LoTC quality badge (<http://www.lotcqualitybadge.org.uk/search>). If not, the Visit Leader must get consent from the Trust and send the OEAP National Guidance document 8p provider questionnaire) <http://oeapng.info/downloads/model-forms-mind-maps-and-checklists/>.

Returned questionnaires must be scrutinised by visit leaders.

### Approval summary table for Educational Visits

Type of Visit	Planning/ Recording Process	Risk Management	Checking/Scrutiny Process	Final Approval	Inform
On-site/Local Learning Area	Recorded on eVisit /not Recorded on eVisit	Local Learning Area Risk Assessment	EVC	Head	
Day Visit outside Local Learning Area	Recorded on eVisit	Provider risk manages activities (LoTC/AALA) or Provider Statement completed School risk manages journey to venue and non-provider led activities using risk assessments supplied by YMD Boon Ltd	EVC	Head	
Adventurous provider led	Recorded on eVisit	Provider risk manages activities (LoTC/AALA)	EVC eVisit submits	Head	

		or Provider Statement completed School risk manages journey to venue and non-provider led activities using risk assessments supplied by YMD Boon Ltd	to EVA for scrutiny		
Adventurous school-led	Recorded on eVisit	School risk manages journey to venue and activities	EVC  EVA will not scrutinize school -led adventurous activities	Head	COO & Estates & H&S Lead
Residential	Recorded on eVisit	Provider risk manages activities (LoTC/AALA) or Provider Statement completed School risk manages journey to venue and non-provider led activities using risk assessments supplied by YMD Boon Ltd	EVC  eVisit submits to EVA for scrutiny 4 weeks prior to visit	Head	COO & Estates & H&S Lead. The COO will then alert the rest of the Exec Team
Overseas	Recorded on eVisit	Provider risk manages activities  School risk manages journey to venue and non-provider led activities using risk assessments supplied by YMD Boon Ltd	EVC  eVisit submits to EVA for scrutiny 4 weeks prior to visit	Head	COO & Estates & H&S Lead. The COO will then alert the rest of the Exec Team
Duke of Edinburgh  Provider or school-led	Recorded on eVisit	School risk manages journey to venue and non-provider led activities / provider led activities	EVC  eVisit submits to EVA for specialist DoE scrutiny	Head	COO & Estates & H&S Lead

## Staff Competence

The Trust and its schools recognises that staff competency is the single most important aspect of safe visit management and supports staff in developing this competence in the following ways:

- A mentoring system, where staff new to visits assist and work alongside experienced trip leaders before taking on a leadership role.

- Supervision by Senior staff of some educational visits
- Support for staff to attend training courses relevant to the role of Visit Leader

In deciding whether any member of staff is competent to be a Visit Leader the Headteacher will consider the following factors:

- Level of relevant experience
- Any relevant training undertaken.
- The emotional and leadership ability of any prospective visit leader to make dynamic risk management judgements and take charge of any emergencies that may arise.
- Knowledge of the pupils, the venue, and the activities to be undertaken.

## **Volunteers**

Visit Leaders should make every effort to recruit the necessary staffing by approaching colleagues employed by the school.

In the event of this failing to produce enough volunteers, with the permission of the Head or Deputy Head, the Visit Leader may invite other appropriately experienced and qualified adults to accompany the trip. All volunteers must be approved by the Head in writing (email) including spouses or partners or other relatives of staff. The Head may require volunteers to provide character references. Any volunteer accompanying a trip will be required to be with a nominated school member of staff. Please refer to the DBS and SCR policy for the appropriate checks.

## **Requirement to Ensure Effective Supervision**

Health and Safety laws do not prescribe activity specific staffing ratios, but it does require that the level of supervision and group management is 'effective'.

The School will assess/determine effective supervision by proper consideration of:

- Staff competence.
- Activity – nature and location of the activity (including the type of activity, duration, skill levels involved).
- Group – age (including the development age) of the group, ability of the group (including special learning needs, behaviour, medical and vulnerability characteristics etc.).
- Environment – nature and location of the activity including the type of the activity, duration, skill levels involved, as well as the time of year and prevailing conditions.
- Distance away from base.

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

The Visit Leader should follow OEAP National Guidance 4.3b Ratio and effective supervision <http://oeapng.info/downloads/download-info/4-3b-ratios-and-effective-supervision/> and 4.3c Risk Management <http://oeapng.info/downloads/download-info/4-3c-risk-management/>

## Emergency procedures

**A critical incident is any incident where events go beyond the normal coping mechanisms and experience of the visit leadership team.**

The School has an emergency plan in place to deal with a critical incident during a visit (see Appendix 2). All staff on visits are familiar with this plan and it is tested at least bi-annually and following any major staffing changes. See also

<http://oeapng.info/downloads/good-practice/>

When an incident overwhelms the establishment's emergency response capability; where it involves serious injury or fatality or where it is likely to attract media attention then assistance will be sought from the Trust via the COO and CEO.

The School will practice their response to emergency situations on educational visits at regular intervals i.e., school inset training.

## Visit Planning

The Visit Leader checklist – National Guidance document 3.3e <http://oeapng.info/visit-leader/> is an important check on the planning of a visit. When a Visit Leader cannot answer yes to a question on this checklist there should be a discussion with the EVC and or Headteacher. In addition, the following steps must be completed for any visit:

- Gain outline approval from the Headteacher to begin planning the visit and agree funding mechanism / charging policy.
- Ensure the visit:
  - has clear learning outcomes
  - has activities appropriate to the group
  - is planned to maximise benefits to the pupils while managing significant risks
  - is appropriately staffed
  - complies with the school's safeguarding policy
- Involve pupils in the planning of the visit, and how it will be managed, wherever possible.
- Ensure emergency procedures include what would happen in the event of illness or injury affecting the visit leader.
- Ensure the base contact back at school is fully briefed and has copies of all relevant information.
- Ensure that the visit is correctly approved and recorded.

## Risk Management

The process of risk assessing a visit will inform the group management plan and improve the control of safety. The recording of risks, and of the measures to mitigate the risks, will demonstrate that Visit Leaders have followed good practice. The risk assessment should tell the 'story' of the visit by walking through the itinerary and documenting the risks and control measures for each step. It is essential that other staff on the visit, and the pupil/students, are aware of the risks and the control measures before the trip takes place – ideally, the risk assessment process will involve these groups but if not, then it will need to be communicated to them well in advance of the trip taking place.

There is a legal requirement for the risk assessment process to be recorded and for suitable and sufficient control measures to be identified for any significant risks. There are generic risks which should be considered for any visit – e.g. children with medical conditions, safeguarding of students, travel arrangements but there will also always be risks which are specific to the individual trip being planned. Although a generic Risk Assessment exists, each trip should have the individual risks for that trip documented within the trip. The Risk Assessment must always be tailored to a particular visit, which may include adapting the generic risks and mitigation.

It is important that while staff are on the visit, they recognise potential risk, hazard and harm and intervene appropriately to protect the pupils/students in their care. This process of dynamic risk assessment does not need to be recorded in writing, but staff must be able to explain any adjustments made to the original assessment and why they made them if asked about them at a future date.

Refer to the National Guidance on good practice for risk management  
<http://oeapng.info/downloads/good-practice/>

### **First Aid and Management of Medical Conditions**

First aid and other medical needs should always be considered in the process of planning and the risk assessment of any visit.

The assessment of the level of first aid cover required should take into account:

- The nature of the activity
- The nature of the group
- The likely injuries associated with the activity
- The extent to which the group will be isolated from the support of the emergency services (both in terms of distance and response times).

In all circumstances, one or more of the staff leading the visit must:

- be a qualified first aider
- ensure that sufficient first aid kits are taken on the visit (one per coach)
- know how to access, and be able to access, qualified first aid support
- have agreed to administer an 'EpiPen' or 'Inhaler' if a student with such a condition is present on the visit
- ensure that plans are in place to support students with particular medical conditions, e.g. diabetes
- during coach travel in which more than one coach is being used, ensure where students have a particular medical condition, such as asthma, allergies or diabetes the coach in which these students are travelling is staffed by those staff who have agreed to administer an 'EpiPen' or 'Inhaler', or who are trained in supporting students with diabetes
- have read this policy in conjunction with the school policies covering safeguarding of children with identified medical conditions.

As part of the preparation for the trip, a list will be provided of the students' medical and SEN needs. The Visit Leader will need to refer to this during the planning process to inform the risk assessment.

If any medication is administered by staff during the trip, a 'Medication Log Sheet' will need to be completed and should be retained with the trip documentation. Depending on the nature of the trip it may also be necessary to collect medical information from staff – for example this will be a requirement when staff are accompanying a residential trip. The Visit Leader will also need to ensure they have up to date emergency contact information for staff.

### **Mobile Phones**

For residential trips and trips outside of school hours the number of the emergency base contact must be given to parents. Staff must not give personal mobile phone numbers to children.

The school mobile phones must be returned to the trip team immediately following the return of the trip staff to school (the morning of the next working day when their return is after normal school hours)

### **Parental Consent**

The school attempts to obtain blanket consent, for all local non-residential visits at the start of each year including sporting fixtures. It is the Visit Leaders' responsibility to ensure that consent has been given by parents/carers for all children on a local trip. Even where consent exists, parents must be given information if their child is taken on a local visit – this can be in letter format.

For any visits beyond the local area, or adventurous trips within the local area, information must be sent home. This should give parents information on the visit and including trip forms which must be completed in full and returned to the Visit Leader before the trip takes place.

Trips and visits require a letter from the Visit Leader to parents setting out the arrangements for the visit.

The letter should include:

- the deadline for the reply slip to be back, and the statement from the policy on selection of pupil/students
- details of the nature and purpose of the visit including date and time
- information about transport arrangements including departure and specifically collection arrangements (especially if dark)
- information regarding clothing/kit
- information regarding eating arrangements and any money that the student might require whilst on the trip
- information regarding behavioural expectations
- information regarding costs (N.B. Parents cannot be charged for educational activities which take place during the school day but they can be asked to pay a voluntary contribution.
- information regarding any known media at the event and consent for their child's image to be used
- the deadline for payment and parental consent

- the schools educational visits Consent to Activity, Medical Details and Treatment form must be used for all visits where separate consent is required, see Appendix 4.
- reference to pupil/student behaviour requirements (see Section ???)
- the standard GDPR statement regarding data sharing.
- The text of the letter must be approved by the Head/EVC before it is sent out to parents
- See the National Guidance document 4.3d on consent <http://oeapng.info/downloads/all-documents/>.

## **Monitoring**

The Visit Leader should undertake an evaluation of each educational visit and submit this to the Headteacher and EVC.

Governors should undertake a sample monitoring of visit documentation to include a residential visit and a day trip at least annually.

## **Inclusion**

All academies must follow the National Guidance on inclusion see 3.2e <http://oeapng.info/downloads/all-documents/>

## **Transport**

The School must follow the National Guidance on Transport for school trips see 4.5a transport, 4.5b minibuses, 4.5c Transport in private cars and 4.5d seat belts. The School will choose the appropriate transport provider by ensuring that the National Guidance Coach/Minibus provider form is completed 8.1s <http://oeapng.info/downloads/all-documents/>

## **Insurance**

Insurance cover for approved educational visits is usually provided by the school insurance provider (public liability) insurance policy. However, as academies may have moved to different insurance providers when they moved away from local authority control confirmation/checks should be made with the insurance provider before the visit takes place. See National Guidance 4.4c Insurance <http://oeapng.info/downloads/all-documents/>