



Policy for Educational Visits and Activities Linking to OEAP National Guidance



Last updated 29th January 2021

Introduction

The LA acknowledges the immense value of educational visits to young people, and fully supports and encourages those that are well planned and managed. Learning Outside the Classroom (LOtC) has a vital part to play in meeting the demands of the National Curriculum, and in achieving the goal of preparing young people for life beyond school. Effective schools have always used educational visits, residential experience and activity in the local area of the school and school grounds as an integral part of their whole-school approach.

This policy statement sets out the framework within which LA employees must operate. Where an establishment contracts with the LA for provision of its Educational Visits Advisory Services, they must also adhere to this policy.

The LA has adopted the “National guidance for the management of outdoor learning, off-site visits and learning outside the classroom” (www.oeapng.info) as its source of guidance and good practice for educational visits and activities. In this policy this is referred to as ‘National Guidance’.

The LA uses the web-based system ‘EVOLVE’ to facilitate the efficient 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). Evolve can be accessed by going to www.rochdalevisits.org

Support, training and access to further guidance can be obtained from Educational Visits Advisory Service. Contact details are listed in Appendix 1.

1. Scope and responsibilities

Scope

This policy applies to all off-site educational visits and all outdoor learning and adventurous activities regardless of location involving children and young people and where appropriate, adults*. It applies regardless of whether the activities take place within or outside of normal working hours, including weekends and holiday periods.

It does not apply to work-experience placements, work-related learning or alternative provision.

* See Appendix 2

Responsibilities

All employees and volunteers involved in the planning, management and leadership of all off-site educational visits and all outdoor learning and adventurous activities must follow this policy.

In addition National Guidance sets out the responsibilities and functions of the following key roles:

1. Employer
2. Educational Visits Adviser

3. Governors
4. Headteacher / Manager
5. EVC
6. Visit Leader
7. Assistant Leaders
8. Volunteer
9. Those in a position of Parental Authority

Refer to individual National Guidance documents headed as above.

2. Establishment policy and procedures

All establishments offering activities within the scope of this policy:

1. Must have an Educational Visit Coordinator who meets the requirements set out in National Guidance (refer to: 3.4j Educational Visits Coordinator)
2. The EVC must complete training and revalidation as specified in the '**Educational Visits Co-ordinator Training and Revalidation**' section below.
3. Establishments must have their own Educational Visit policy which sets out their management and approval procedures. All establishment Educational Visits Policies must be consistent with OEAP National Guidance and this policy.

A Model Establishment Visit Policy is provided on Evolve (www.rochdalevisits.org)

Consent

The establishment's educational visit policy should make clear the system for ensuring that parents and guardians are notified of offsite activities and, where appropriate, ensure 'informed' parental consent is in place.

The DfE outlines the legal framework for consent in "Health and safety: advice on legal duties and powers for local authorities, school leaders, school staff and governing bodies". This document states that consent is not required for most activities in school time and where required, can be obtained at the point of entry to the school. However the local system for communicating with parents and obtaining consent for visits within and outside school hours should take account of:

- the extent to which trips are reliant on voluntary contributions from parents
- cultural sensitivities
- the culture of the school and its relationship with parents
- the frequency of educational visits and the balance between local activities (within walking distance) and those requiring transport.

Many schools now find that some form of 'blanket consent' reduces the burden on staff and parents. This could be obtained at enrolment or on an annual basis (separate arrangements must be in place for ensuring that contact details, medical and dietary information etc are kept up to date).

Where blanket consent is sought it should make clear the nature and extent of the applicability of this consent (consent is required for all visits organised by establishments other than schools).

Examples where specific consent should be obtained include:

- residential visits including camping and in-school sleepovers
- adventurous activities
- overseas visits

Obtaining blanket consent can help to avoid situations arising where the consent form for a trip has not been returned by the day of departure. This can create practical problems and stress for staff and parents. Whilst 'verbal consent' may be a practical way to manage a problem on the morning of departure, it is far from ideal and should be regarded as a last resort. A note should be made of the time and date of the phone call, who made it and who gave consent.

Refer to example blanket consent form on Evolve (www.rochdalevisits.org)

Refer to National Guidance: 4.3d 'Parental Consent'

Staff competence

Staff leading, managing or approving off-site educational visits, outdoor learning and adventurous activities must be competent and confident to carry out their role and be approved by their Head of Establishment and where appropriate their Employer. Rochdale Borough Council provides a range of training courses to support staff in carrying out their roles effectively. These are specified below.

Educational Visits Co-ordinator Training and Revalidation

Every establishment operating under this policy must appoint a trained Educational Visits Co-ordinator. Newly appointed EVCs must complete Rochdale Borough Council's OEAP EVC training course and thereafter attend a revalidation session every three years. The courses cover the strategic leadership and management of off-site educational visits, outdoor learning and adventurous activities.

Competence to lead visits

There should be a clear process for approving leaders to lead visits or activities. Leaders must be accountable, confident and competent to lead the specific visits or activities for which they are approved. The Head 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.

The single most important factor in ensuring the safety of participants involved in an Educational Visit is the competence of the Visit Leader. The EVC should therefore consider the following when assessing the competence of a member of staff to lead, or accompany a visit:

- What are the leader's reasons for undertaking the visit?
- Is the leader an employee and if not, is there a clear line of accountability?
- Can the leader/leadership team appropriately manage the teaching and learning in addition to the health, safety and welfare of the young people?
- Do all accompanying adults have a defined role?
- Is the leader organised?
- Are the leader/leadership team competent in managing risk?
- What experience has the leader of the young people he/she intends to lead?
- What is the leader's and leadership team's prior experience of similar visits or activities?
- Has the leader been inducted into the establishment's procedures?

- What experience has the leader of the environment/geographical area chosen?
- Do the leader/leadership team possess appropriate qualifications?
- If appropriate, what are the leader's and leadership team's personal levels of skill in the activity, and fitness level?
- If leading adventurous activity have all the leaders been 'approved' by the Employer/Outdoor Education Adviser?
- Has the leader addressed medical, first aid and inclusion issues?
- Is the leader aware of, and able to comply with all relevant guidelines?

The establishment should contact the Educational Visits Advisory Service if there is doubt regarding the competence of a member of staff to lead an Educational Visit.

Visit Leader Training

Rochdale Borough Council provides Visit Leader training courses for staff leading and supporting educational visits. These courses cover the planning and leadership of off-site educational visits, outdoor learning and adventurous activities. Contact the Educational Visits Advisory Service for further details.

Refer to National Guidance: 3.2d Approval of Leaders

3. Planning and approval procedures

Learning Outcomes

When making the decision to lead/plan an off-site activity it is essential to consider the justification for the visit, how it fits into the curriculum and what the pupils/students will gain from the experience i.e. what are the learning outcomes for the activity.

Risk Management

Risk management is an inherent part of visit planning. It should be proportionate to the complexity of the visit being undertaken and evidenced. The evidence may include:

- generic risk assessments/ operational procedures
- specific risk assessments
- other visit planning documents

Risk management is the responsibility of the whole staff team led by the visit leader.

Refer to National Guidance: Risk Management 4.3c, 4.3f, 4.3g

Approval before contractual arrangements are made

Visit Leaders must gain approval from the Head of Establishment before any contractual arrangements or financial commitments are made. Heads of Establishment must ensure that any overriding contractual arrangements are made between the establishment and the provider rather than between parents and provider.

Pre-visits

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 requirements. Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement.

Self led adventurous visits

Establishment staff proposing to lead adventurous activities must be approved by their Head and Educational Visits Adviser prior to embarking on detailed arrangements.

Working with providers

When an establishment is using a provider for teaching and instruction:

- the provider is responsible for the risk management of their provision.
- the Visit Leader is responsible for pastoral care (wellbeing, behaviour, medical, SEND) and the risk management of any aspects of the visit which they lead themselves, including all non-taught time and travel.

Refer to National Guidance: 3.2a Underpinning Legal Framework and Duty of Care

Where they are available, Visit Leaders should take advantage of nationally accredited provider assurance schemes to select suitable providers.

Checking providers

Where a provider holds the Learning Outside the Classroom [\(LOtC\) Quality Badge](#), there is no need to seek further assurances regarding safety. However Visit Leaders should ensure that a Provider Statement is completed if no LOtC Quality Badge is held.

Certain adventurous activities require an Adventurous Activities Licence (AALA/AALS) which will either be captured through a Learning Outside the Classroom Quality Badge or a Provider Statement.

If using a provider, they should normally hold a minimum of £10million Public Liability insurance

Accommodation

Appropriate checks and/or assurances should be sought. The accommodation at an LOtC Quality Badged provider will have been deemed appropriate for educational visits. The relevant questions on the Provider Statement can be used to help to gather key information. Professional judgment should be used taking into account all the relevant issues.

Ratios and supervision

As part of assessing the risk of educational visits, outdoor learning and adventurous activities, visit leaders should determine the appropriate supervision arrangements by considering factors including **'SAGED'**:

- **Staffing**
For example: Consider whether the adults have undertaken training, what level of experience they have and whether they know the group. Consider what level of competence is necessary (e.g. skill, knowledge, understanding, fitness) from all of the supervising adults. Ensure that all adults are competent for the roles that are assigned to them.
- **Activity**
For example: Consider the nature of the intended activity and whether it requires specialist knowledge and/or equipment. Consider whether the activities might be affected by the location (crowds, remoteness, access etc.).
- **Group**
For example: Consider the characteristics of the group and what prior experience they have of the activity and environment; also consider their ability and maturity. If any of the group has behavioural, medical or learning needs, ensure that these can be managed appropriately.
- **Environment**
For example: Consider the impact that the weather may have on the group, activity or travel arrangements. Be aware that environmental conditions can change dramatically and ensure that there is a Plan B where appropriate. Where relevant to the location and activity, the visit leader must have a good understanding of how water levels can change and be able to make appropriate judgements.
- **Distance**
For example: Consider how far the activity or visit is from the normal support mechanisms of the school and whether it is close enough to rely on immediate support from the school, or further afield where it cannot. The type of transport being used may impact on the level of supervision required (e.g. a coach journey may require a smaller supervision ratio than a visit using public transport). If the visit involves an overnight stay, a higher level of first aid competence may be necessary, and staff may need to operate a supervision rota for longer residential visits.

EVCs and Headteachers are responsible for ensuring effective supervision is in place on all visits.

Refer to National Guidance:

- 4.3b Ratios and Effective Supervision
- 7a Adventurous Activities
- 3.2f AALA Licensing
- 4.4c Insurance
- 4.4b First Aid
- DfE Early Years and Foundation Stage Statutory Guidance.

4. Rochdale Borough Council Procedures

Visit Management system

The online planning and management system (www.rochdalevisits.org) must be used by visit leaders for the planning and approval of *residential*, *overseas visits* and *adventurous activities*.

Establishments may choose to identify a 'local learning area' and generic operating procedures. The school's policy should be explicit about which local, routine, low risk visits and activities these arrangements will apply to. In this case, these visit will not need to be submitted and approved via the online system, but the visit leader must ensure that essential information is communicated with a named person in school when they go off-site. Refer to Signing-Out sheet on Evolve (www.rochdalevisits.org)

All other single day off-site educational visits and outdoor learning must be submitted for approval by the Visit Leader using the online system.

Visits that **do not** require Employer approval should be submitted to the EVC in the time frame set out in the school's visit policy. Visits that **do** require Employer approval should be submitted by the Head to the Employer at least 20 working days prior to departure. Complex visits/activities should be discussed with the Educational Visits Adviser in the early planning stages.

Refer to Appendix 4 for summary and approval deadlines.

Adventure activities run on the school / establishment site should also be planned and approved through the online system – refer to Appendix 3 for a list of typical activities classed as adventurous for the purposes of this policy.

Overseas Expeditions require enhanced planning and establishments considering this should contact the Educational Visits Advisory Service before booking – preferably at least 18 months prior to the planned event.

5. Emergency Procedures/ Incident Management

Heads/managers must ensure that there are appropriate Emergency Procedures in place for Off-site visits. These should be under the umbrella of a School Emergency Plan/ Critical Incident Plan which allows any type of emergency/incident to be appropriately dealt with. Schools must also ensure they are familiar with their employer's Emergency Procedures. Refer to Emergency Plan for Educational Visits on Evolve (www.rochdalevisits.org)

In an emergency the Visit Leader (and accompanying staff) should follow the Visit Leader Emergency Action Card and the Emergency School/Base Contact should follow the Establishment Management Emergency Action Plan. Refer to Emergency Plan for Educational Visits on Evolve (www.rochdalevisits.org)

The following should be in place for all visits:

1. Carried by Visit Leader & all accompanying staff:

- Group list
 - All contact details (these may be held in school for local visits during school hours)
 - Visit Leader Emergency Action Card
 - Mobile phone
 - Group first aid kit(s)
2. Held by Emergency Base Contact (e.g. head teacher/ senior leader back at school):
- Group list
 - All contact details
 - Emergency Action Cards:
 - Visit Leader Emergency Action Card
 - Base Contact Emergency Action Card (e.g. head/senior leader back at school)
 - 24/7 access to all visit details

Staff should undergo training at an appropriate level to ensure that they understand the procedures. Emergency plans should be tested from time to time at both establishment level and employer level.

References and further guidance:

- Visit Emergency Training (Contact the adviser)
- Rochdale Borough Council's Emergency Plan for Major Incidents on Educational Visits
- Contact Emergency Planning Officer/ Civil Contingencies Team for support
- OEAP NG document: 4.1i Emergencies and Critical Incidents – An Overview
- OEAP NG documents: other emergency documents in section 4.1 of NG

Visit Incident Management

Visit Emergency Training courses are available for senior leadership teams in order that they are appropriately prepared for managing and co-ordinating the establishment's response to critical visit incidents, please contact the Educational Visits Advisory Service for further details.

6. Monitoring of visits and procedures

Headteachers and Service Managers should ensure that visits and visit management procedures are monitored to ensure the requirements of this policy are being carried out. This monitoring should be along similar lines to the evaluation of Teaching and Learning in the classroom.

It should be clear in the establishment visit policy who is responsible for carrying out this monitoring. This may be supplemented by field monitoring by the Educational Visits Advisory Service on the Employer's behalf.

Types of monitoring include:

Submission and approval process by EVC and Head/Manager monitors planning and arrangements

Discussions with visit leader/staff team

Feedback from staff, pupils, parents

Asking pupils about the visit

Field monitoring (this should take place from time to time to help confirm that practice on the ground meets expectations)

Monitoring can cover safety factors such as:

- Risk assessments are in place for the activity and the plan B activity
- Evidence of staff training and competence
- Personal Protective Equipment and other safety critical equipment
- Transport including driver competence
- Suitability of venue and location
- Weather and time of year
- Emergency procedures including base contact and communication
- First aid provision
- Pastoral supervision

However, it is also important to consider the importance of quality of provision and factors that can be monitored include:

- Clear aims and objectives
- Does the task/activity match the aims and objectives?
- Proportion of time on task
- Differentiation
- Progression
- Pace
- Appropriate level of challenge
- Inclusion and special needs provision
- Extension activities
- Assessment for learning
- Relating learning to other contexts
- Evaluation

Refer to National Guidance document: 3.2b Monitoring

7. Charges for Off-site Activities and Visits

Charging and remissions

The Education Act 1996, sections 449-462 sets out the law on charging for school activities in England. The Department for Education provides guidance to Heads of Establishments and Governing Bodies as to the requirements of a charging & remissions policy, voluntary contributions and what can or cannot be charged for.

Rochdale Borough Council Heads/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.

Refer to National Guidance document: 3.2c Charging for School Activities
DfE document: Charging for School Activities

8. Inclusion & SEND

Activities should be available to all, irrespective of special educational or medical needs or protected characteristics (disability, gender re-assignment, pregnancy and maternity, race, religion or belief, sex, sexual orientation).

The Equality Act states that an establishment (e.g. a school) must not discriminate against a young person because of one of the protected characteristics. There is a duty to make reasonable adjustments. Establishments must have due regard to equality considerations whenever significant decisions are being made or policies developed. Consideration must be given to the equality implications from the start of the planning process, not as an afterthought.

Any individual risk assessment, behaviour/care plan should inform the planning process. Appropriate levels of supervision and staff with the necessary competences/training should be in place (e.g. intimate care/ feeding; manual handling; team teach/ restraint; administering rescue meds etc).

If a decision is taken to exclude a young person (e.g. if the necessary reasonable adjustment(s) would unduly impinge on the learning outcomes for the rest of the group) then:

- All relevant parties must have been consulted throughout the process
- there must be a clear rationale
- the process should be carefully recorded with a clear audit trail evident

Behaviour

It may be reasonable to exclude a young person on the grounds of behaviour if the behaviour is unmanageable and presents a significant health, safety and/or welfare risk to the young person, the group or the leaders. Where behaviour issues are not associated with a protected characteristic then it is unlikely the Equality Act will apply.

Refer to National Guidance: 3.2e Inclusion, 4.4i Special Educational Needs and Disabilities
DfE Equality Act 2010: Advice for Schools

9. Safeguarding

Safeguarding procedures should be considered as part of the planning process with additional consideration for residential visits.

Visit Leaders should:

- Liaise with DSL (Designated Safeguarding Lead) and Pastoral Leaders to identify any relevant safeguarding issues
- Ensure appropriate vetting and barred list checks are in place (including enhanced DBS and barred list checks for unsupervised adults engaged in regulated activities)
- Consider issues relating to on-line safety, social media, access to and sharing of inappropriate content
- Know how, when and who to report safeguarding concerns to during a visit
- Be familiar with Safer Working Practice principles

Disclosure and Barring Service (DBS) Checks

Establishment staff will normally require an enhanced DBS check with barred list check as a result of their day to day work.

Leaders/helpers (including volunteers) involved in off-site visits will require an enhanced DBS check with barred list check if they meet each of the following criteria:

- they are involved in a regulated activity
- they are unsupervised
- the activities are carried out frequently or intensively

(For further details see OEAP NG document: 3.2g Vetting and DBS Checks)

Further guidance to consider:

- OEAP NG documents:
 - 4.3e Safeguarding
 - 3.2g Vetting and DBS Checks
- Keeping Children Safe in Education
- Safer Working Practice Guidance

10. Insurance for Off-site Activities and Visits

Establishments should ensure they have appropriate insurance in place. This should include checks to ensure that cover is provided for visits abroad, adventurous or hazardous activities e.g. Winter sports (including artificial skiing and snow slopes in the UK).

Unusual activities may need to be discussed with the Educational Visits Advisory Service to ensure that insurance is in place.

Local Authority Schools can obtain cover via the Council's insurance section. Other schools may need to make their own arrangements.

Rochdale Borough Council holds Public and Employer's Liability insurance, indemnifying it against all claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property. Employees are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities such as off-site activities and visits organised by establishments and settings for which the employer is responsible.

Heads and Service Managers should note that insurance cover may be invalidated if they fail to adhere to the requirements of this policy and advice within National Guidance.

Refer to National Guidance document: 4.4c Insurance

11. Liability Waivers

Schools must not undertake any activity where the provider asks for a liability waiver to be signed (either by school staff or by parents) before participation.

Refer to National Guidance document: 3.2i Contracts and Waivers

12. Transport

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

The Headteacher or Service Manager should ensure that coaches and buses are hired from a reputable company.

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

Refer to National Guidance document: 4.5c Transport in Private Cars, 4.5a Transport: General Considerations and 4.5e Hiring a coach

Refer to ACPO / DfT/DFE document 'Driving School Minibuses'

Minibuses

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. In addition on longer journeys consideration should be given to factors such as driver fatigue and comfort breaks.

Refer to National Guidance document: 4.5b Transport in Minibuses

NB Rochdale Borough Council requires all employees driving minibuses to hold current MIDAS training and certification.

Appendix 1

In accordance with the requirements of National Guidance the Educational Visits Advisory Service for Rochdale Borough Council is currently:

Educational Visits Adviser

Dave Scourfield

Email: david.scourfield@rochdale.gov.uk

Telephone 01706 926760

Mob 07976 059303

Outdoor Education Officer

Tom Booth

Email: thomas.booth@rochdale.gov.uk

Telephone 01706 926759

Mob 07773 975361

The Council's 24 Hour Emergency contact is:

The LA Safety Team on **01706 925060** (08.30-16.45)

OR

The Emergency Out of Hours Team on **0300 303 8875** (16.45-08.30)

Appendix 2

The Services currently within the scope of this policy are:

- Schools
- Youth Service
- Music Service
- Youth Offending Team
- Children's Centres

Appendix 3

Types of visit

For the purposes of this policy a range of activities are classed as adventurous and require an enhanced level of planning and scrutiny. The list below gives examples of activities and clarifies whether they should be regarded as adventurous. If in doubt over the classification of an activity, class it as adventurous in the first instance. Unusual activities may need to be discussed with the Educational Visits Advisory Service to ensure that insurance is in place.

Normal, routine	Adventurous activities
Athletics	Gorge scrambling
Bike training	Mine exploration
Cinema	Mountain biking, BMX and Cyclocross
Park	Caving
Places of worship	Fell running
Shopping	Kayaking
Sports fixtures	Climbing – rock
Swimming lessons	Hillwalking
Theatre	Abseiling
Restaurant visits	Mountaineering
Sports centres	Canoeing
Ice skating	Climbing – artificial structures
Leisure pools	Potholing
Roller skating	Sailing
Forest schools (no bladed tools)	Skiing
Bushcraft (with no bladed tools)	Snowboarding
Geography fieldwork (in everyday environments)	Stand-up paddle boarding
Field studies	Surfing
Laser Quest	Windsurfing
Segway	Orienteering
Cycling	Body boarding
Professionally lifeguarded pools	Beach schools
Parkour using gym equipment	Bushcraft with bladed tools
	Forest schools (using bladed tools)
	Geography fieldwork (in hazardous environments)
	Parkour (outdoors)
	Zorbing
	Archery
	Trampolining
	Coasteering
	Scuba diving
	Snorkelling

	Open water swimming
	High Ropes course activities
	Non Lifeguarded swimming pools
	Karting and motorsports
	Paintball*
	Trampoline parks*
	Overseas expeditions*
	* Consult the Educational Visits Adviser before booking this activity

Appendix 4

Timescales for approval

Approval responsibility
headteacher and employer.
Visits must be submitted to the Employer at least **20 working days** before departure

**Overseas
Residential
Adventurous**

EVOLVE

Approval responsibility
headteacher.
Submission deadlines should be defined in school policy

Other single Day Visits

EVOLVE

Routine Local Visits

May be pre-approved in policy or approved on Evolve.
This should be defined in the school's educational visit policy