

Educational Visit Policy

**Approved by: Board of Directors
Effective From: March 2016**

**Reviewed by: Deputy Headteachers and Approved by Headteachers
Review Date: March 2021
Next review Date: March 2022**

What is our philosophy?

In the Heathland Whitefriars Federation, we believe that visits beyond the school help to enrich the lives of all our children by enabling them to experience the richness of the world beyond school in a way that extends their experiences, adds depth to their learning and develops their understanding of the world they are part of.



Article 29 You have the right to be the best that you can be

What is our aim?

We aim to ensure that during their time with us every child has a range of visit experiences beyond the school to enhance their learning within all areas of the curriculum.



Article 3: Everyone who works with children should always do what is best for each child

What is our guidance as a school?

1. Provision of Employer Guidance

This Educational visits guidance can be found on the following web site: www.oeapng.info The DfE Guidance for Health and Safety in Schools is here: [DfE advice on Health and Safety](#)

It is a legal expectation that HEATHLAND WHITEFRIARS FEDERATION employees **must** work within the requirements of their employer's guidance.

HEATHLAND WHITEFRIARS FEDERATION employees should also follow National Guidance (NG) recommendations.

Where there is any variance of policy between the national guidance and HEATHLAND WHITEFRIARS FEDERATION policy, Heathland Whitefriars Federation policy requirements take precedence over any.

Where a HEATHLAND WHITEFRIARS FEDERATION employee commissions a **Learning Outside the Classroom** (LOtC) activity, they must ensure that such commissioned agent has either:

1. adopted guidance HEATHLAND WHITEFRIARS FEDERATION or OEAP National Guidance
- or**
2. has systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

2. Scope and Remit

The NG document "[Basic Essentials MUST Read - Status and Remit](#)" clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base
- direct supervision of young people undertaking experiences that fall within the remit of Educational visits and Learning Outside the Classroom;

- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base

This applies regardless of whether or not the activities take place within or outside of normal working hours.

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

This Policy relates to the following Heathland Whitefriars Federation policies (Health and Safety Policy, Employment, Insurance, Critical Incident)

3. Ensuring Understanding of Basic Requirements

As an employer, the HEATHLAND WHITEFRIARS FEDERATION is required to ensure that its employees are provided with

- appropriate guidance relating to visits and LOtC activity;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from an appointed Adviser that has proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the management of outdoor learning and LOtC at the HEATHLAND WHITEFRIARS FEDERATION is the Employer Guidance web site [OEAPNG](#)

The relevant training courses for example are:

1. Educational Visit Coordinator (EVC) Training – undertaken at The Royal Geographical Society
2. Visit Coordinator (EVC) Revalidation – As above when required
3. Visit Leader Training – all visit leaders have training and support from the EVC and an ‘apprenticeship’ system is operated with experienced staff mentoring staff with less trip experience. All new staff have ‘visit leader training’ as part of their induction programme. For example, Inset session

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should consult the EVC.

4. Approval and Notification of Activities and Visits

Employer guidance **must** provide clarity on issues where responsibilities and functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities.

The Heathland Whitefriars Federation uses essential admin documents that can be found on the intranet (Teachers only). When a visit is approved by EVC and finance the following will need to be organised: cover, diary, catering, selected member of SLT and Phase Leaders are informed.

Approval

All visits are approved at Head and EVC Level. Director approval is required for all residential visits and all adventure activities.

The approval process and procedures for day, adventurous and residential visits are set out in detail on the School intranet Educational Visits folder (consent forms, emergency cards, trip letters etc.) are available.

Sport fixtures and trips as part of the weekday Activities programme are approved by EVC.

The competence of the visit leader is the key component in ensuring the safety of the participants. Assessment, training and support of visit leaders is a priority of the EVC.

All School trips have a named leader who must be a serving teacher at HEATHLAND WHITEFRIARS FEDERATION. The approval paperwork is to be completed by the Trip Leader.

5. Risk Management



Article 19: you have the right to be safe

Refer to NG document: [**“Risk Management”**](#)

As an employer, the HEATHLAND WHITEFRIARS FEDERATION has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring the HEATHLAND WHITEFRIARS FEDERATION to provide such support, training and resources to its employees as is necessary to implement this policy.

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

There is no legal or the HEATHLAND WHITEFRIARS FEDERATION requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. HSE case study examples of sensible school trip risk management are available here: [**HSE case-studies.**](#)

The HEATHLAND WHITEFRIARS FEDERATION risk management plans exist for a wide range of trips and components of trips – accommodation, transport, theatre trips etc. These are available on Teachers Only – Educational Visits - [**Risk Management.**](#)

For a clear justification for the Risk/Benefit approach to risk management see the article by Professor David Ball here: [**the-future-of-risk-assessment**](#)

6. Emergency Planning and Critical Incident Support

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

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

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

Refer to NG document: [**"Critical Incident Management for Visits"**](#) and the Heathland Whitefriars Federation **Critical Incident Policy**.

All HEATHLAND WHITEFRIARS FEDERATION trip leaders are provided with Critical Incident information detailing our emergency procedures and contact details for Heathland Whitefriars Federation Critical Incident team.

All residential trips have a nominated Critical Incident base contact who has trip details and is 'on call' at all times.

7. Monitoring

As an employer, the HEATHLAND WHITEFRIARS FEDERATION ensures that there is monitoring of the visits and LOtC activities undertaken by its staff. Such monitoring should be in keeping with the recommendations of Employer Guidance. There is a clear expectation that the monitoring function is a delegated task put in place by the EVC and principally carried out by experienced staff acting as mentors/advisors for colleagues.

Refer to NG document: [**"Monitoring"**](#)

8. Assessment of Leader Competence

Employer Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the Heathland Whitefriars Federation Policy that all leaders and assistants have been assessed as competent to undertake such responsibilities as they have been assigned in line with national guidance.

All staff involved in off-site activities complete a 'Assessment of Competence' where experienced staff comment on their role in previous trips and based on their experience the EVC decides which of four levels (assist, lead day, lead residential, lead residential overseas) the member of staff can operate at.

Across all trips, the HEATHLAND WHITEFRIARS FEDERATION must have a qualified First Aider and when needed a member of staff must have Minibus driving qualifications.

The HEATHLAND WHITEFRIARS FEDERATION acknowledges the immense educational benefits that adventurous activities can potentially bring to young people, and fully supports and encourages adventurous activities that are correctly planned, managed, and conducted. All centres and providers used by the school for the provision of adventure activities will hold a current AALS licence.

Other Areas

Staff competence in first aid, minibus driving, life saving etc may also be needed, depending on the activity. Volunteers will also require pre trip briefing prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process.

Refer to NG document: [**"Assessment of Competence"**](#)

9. Role-specific Requirements and Recommendations

Employer Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within the HEATHLAND WHITEFRIARS FEDERATION management structures. These are:

Director (Employers)
Head
EVC

Refer to individual NG documents headed as above.

Employer Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found in the establishment. These are:

1. Directors
2. Headteacher
3. EVC
4. Visit or Activity Leader
5. Assistant Visit leader
6. Volunteer Adult Helper
7. Parents

The following link includes detailed guidance for each role listed above

[oeapng - guidance by role](#)

10. Charges for Off-site Activities and Visits

HEATHLAND WHITEFRIARS FEDERATION has the following 'code' for charging for visits:

- If the trip is compulsory in school time and required for the scheme of work then the school covers the cost or provides a significant subsidy.
- If the trip is optional or out of curriculum time then the cost of the trip is passed on to parents.
- Each proposal is judged on its merits by the EVC and Senior Staff.

11. Vetting and DBS Checks - see also [HEATHLAND WHITEFRIARS FEDERATION Child Protection Policy](#)

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

DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

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

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

12. Requirement to Ensure Effective Supervision

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

Effective supervision should be determined by proper consideration of:

- Previous visits
- Staff Competence
- Activity - nature and location of the activity (including the type of activity, duration, skill levels involved)
- Group - age (including the developmental age) of the group; ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- Environment - nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions,
- Distance away from the base

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

See link here: "[Early Years Foundation Stage](#)"

Refer to NG document: "[Ratios and Effective Supervision](#)"

Refer to NG document: "[Group management and Supervision](#)"

13. Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. The EVC will advise on this in each specific case. A pre-visit is usually required for all visits, unless the group leader has been previously and there have been no changes to the trip site or where there is a high complexity factor.

Residential, visits abroad and adventurous activities led by school staff all have aspects of complexity. If the visit is led and managed by a provider, then a variety of approaches can reduce the need to pre visit.

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

Examples of such schemes include:

[The LOfC Quality Badge](#)
[AALS licensing](#)
[Adventuremark](#)
[School travel forum](#)

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

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

14. Insurance for Off-site Activities and Visits (finance team to check)

Employer's Liability Insurance is a statutory requirement and the HEATHLAND WHITEFRIARS FEDERATION have arranged a policy that will respond and, if appropriate, indemnify against all claims for compensation for bodily injury suffered by any person with a contract of employment. This cover also extends to those persons who are acting in an authorised voluntary capacity as assistant supervisors. The HEATHLAND WHITEFRIARS FEDERATION also holds Public Liability insurance, which will indemnify the school 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, third party property where the HEATHLAND WHITEFRIARS FEDERATION are deemed to have been negligent. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff if they commit a negligent act. The indemnity includes activities such as off-site activities and outside visits organised by all departments for which HEATHLAND WHITEFRIARS FEDERATION may be considered responsible.

The School also holds comprehensive travel insurance for staff and pupils. Details of the Policy are available to trip leaders and sent to parents as part of pre-trip administration.

Refer to NG document: "[Insurance](#)"

15. Inclusion

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

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

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

Employers, Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a Legal issue.

Under the Disability Discrimination Act 1995, it is unlawful to:

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

Refer to NG document: ["Inclusion"](#)

16. Good practice requirements

To be deemed competent a Visit / Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognized good practice for that role.*

All staff and helpers must be competent to carry out their defined roles and responsibilities.

Employer Guidance sets a clear standard to which the HEATHLAND WHITEFRIARS FEDERATION leaders must work. The guidance states:

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

- Knowledge and understanding of their employer's guidance supported by establishment-led training.
- Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment e.g. inset training
- Knowledge and understanding of the staff, the activity, the group and the venue.
- Appropriate experience
- In some circumstances (e.g. first aid, mini bus) a formally accredited qualification."

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. The School should firstly view the 'competence list'. This should also include 'first aid' and 'mini bus' certificates when verifying leader's qualifications, and not rely on photocopies.

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

Refer to NG document: ["Good Practice Basics"](#)

17. Medical

Medical details for students and staff taking part in trips are collected by the trip leader either through a specific medical consent form for residential trips, or by reference to the school database for day visits. The School Welfare team is also consulted for all trips including day and residential trips. Any specific student medical issues are to be included in the trip risk management planning and consent for their medication to be administered by staff checked. Children taking travel sickness medication must additionally have a specific consent form signed by their parent/ carer to enable its administration.

Trip specific first aid training is provided for the HEATHLAND WHITEFRIARS FEDERATION trip leading staff by It is desirable that at least one member of staff supervising students on a school trip have knowledge of appropriate first aid.

18. Transport

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

Minibuses (see mini bus policy)

It is a requirement of the HEATHLAND WHITEFRIARS FEDERATION Policy that selected staff must hold category D1 entitlement on their driving licence and have completed MIDAS training.

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

The Visit Leader should ensure that external coaches and buses are hired from a HEATHLAND WHITEFRIARS FEDERATION-approved company.

Also see NG document: [**“Transport in Minibuses”**](#)

Transporting young people in private cars requires careful consideration. Staff cars should only be used to transport students in ‘unplanned’ or ‘emergency’ situations. For example, Journeys to hospital, to prevent students being stranded at Failand etc.

Refer NG document: [**“Transport: General Considerations”**](#)

19. Planning

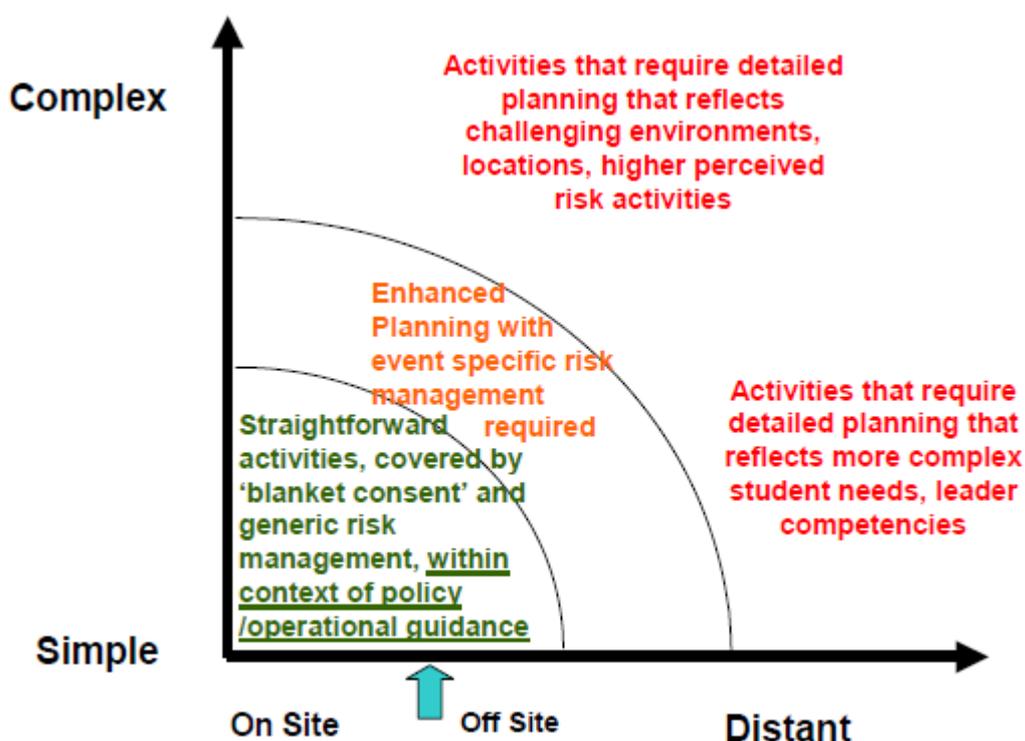
Planning should reflect the consideration of Legal and good practice requirements, ensuring:

- The plan is based on the HEATHLAND WHITEFRIARS FEDERATION procedures and employer guidance.
- Children are briefed (IWB presentation) before the trip to outline the trip and expectations
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.

- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as “**SAGED**” as explained below.

- **Staffing requirements** – trained? experienced? competent? ratios?
- **Activity characteristics** – specialist? insurance issues? licensable?
- **Group characteristics** – prior experience? ability? behaviour? special and medical needs?
- **Environmental conditions** – like last time? impact of weather? water levels?
- **Distance from support mechanisms in place at the home base** – transport? residential?



Refer to NG document: “**Planning Basics**”

Example of HEATHLAND WHITEFRIARS FEDERATION trips

Straightforward – Sport, local theatre, local museum, House or Form meal

Enhanced Planning – Residential

Complex student needs leader competencies – Residential that includes Water sports

20. Consent

The HEATHLAND WHITEFRIARS FEDERATION parents’ consent to the following:

- 1 **School Trips:** A variety of school trips will be provided for all pupils. Parents will be asked to make a voluntary contribution to the trip 8 weeks prior and to give their consent. School trips abroad or those in the United Kingdom involving an overnight stay will be the subject of a separate agreement with parents. The cost of the trip will be payable in advance. The Pupil is subject to School discipline in all respects whilst engaged in a School trip.

All residential trips and adventurous activities require specific parental consent.

21. The Value and Evaluation of LOtC

The Ofsted report "[Learning Outside the Classroom – How Far Should You Go?](#)" (October 2008) makes statements in the strongest terms to support the value of LOtC, including the fact that it raises achievement. Refer to NG document: "[Ofsted and LOtC Summary](#)"

However, it also highlights the finding that *even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigour* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the National Guidance document: 5.1c "[Rigorous Evaluation of LOtC: Meeting Ofsted Expectations and Assuring Quality](#)".

Appendix A

Adventure Activities

Below is a list of 'Adventure Activities' as agreed by Local Authority outdoor education advisors.

Before our students take part in any of these we need to be sure that the relevant National Governing Body qualifications are held by the person/organisation running the activity or a technical advisor has provided a statement of competence.

- All activities in 'open country' such as D of E Expeditions.
- Swimming (all forms, excluding publicly life guarded pools)
- Camping where participants/leaders erect tents and/or self-cater.
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing
- Paintball (including 'Laser Quest')
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Mountain biking
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration (Except designated 'Show' caves)
- Shooting and archery
- Skiing, snowboarding, and related activities (including dry slope)
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- 'Extreme' sports (Parcours, Bungee, Zorbing, Mountain or ATB Boarding etc.)
- Other activities (e.g. initiative exercises) involving skills/risks inherent in any of the above