



# Ulverston Victoria High School

## Educational Visits Policy

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## Contents

1	Introduction .....	0
1.1	Aims .....	0
1.2	Scope .....	0
2	Roles and Responsibilities .....	1
2.1	The employer .....	1
2.2	The Head teacher or Manager .....	1
2.3	The Educational Visits Coordinator .....	2
2.4	Visit leaders .....	2
2.5	Assistant visit leaders .....	2
2.6	Helpers .....	3
2.7	Pupils .....	3
2.8	Parents or those with parental authority.....	4
3	Visits Procedures .....	5
3.1	Obtaining approval for Category 1 visits.....	6
3.2	Obtaining approval for Category 2 visits.....	6
3.3	Communication and consent .....	7
4	Vetting and Safeguarding.....	9
5	Overseas Visits and Specialist Activities.....	9
6	Induction, Training, Apprenticeship and Succession Planning.....	<b>Error! Bookmark not defined.</b>
7	Risk Benefit Analysis and Risk Management.....	10
7.1	Our duty of care .....	10
7.2	Effective supervision .....	11
7.3	Transport .....	12
8	Assessing Facilities and Providers .....	13
9	Emergency Procedures and Incident Reporting.....	14
9.1	First aid .....	14
9.2	Supporting pupils with medical conditions .....	14
9.3	Accident/incident recording and reporting.....	15
9.4	Critical incident procedures .....	15
9.5	Public Health Emergency Preparedness.....	16
10	Insurance .....	16
11	Finance .....	16
12	Visits Evaluation and Monitoring .....	17
13	Further Guidance .....	17

## 1 Introduction

Ulverston Victoria high School recognises the positive outcomes associated with Learning outside the Classroom (LOtC) and believes that every young person should experience this essential part of learning and personal development, whatever their age, ability or circumstances.

LOtC to be governed by these procedures is defined as: “any occasion where young people engage in activities beyond the boundaries of this setting”.

Our rationale is that such learning often makes the most memorable learning experiences and helps young people make sense of the world by linking feelings and learning. These experiences stay with them into adulthood and affect behaviour, lifestyle and work. They influence their values and the decisions they make and develop an individual’s ability to transfer skills from outside to the classroom and vice versa.

## 2 Aims

When we provide learning outside the classroom, our intended outcomes seek to ensure that our pupils:

1. Enjoy participating and reflecting in outdoor activities and adopt a positive attitude to challenge and adventure.
2. Are enhancing their overall well-being by gaining personal confidence and developing character and resilience through taking on challenges, experiencing valuable failures, and achieving success.
3. Are developing their self-awareness and social skills, and their appreciation of the contributions and achievements of themselves and of others.
4. Are becoming alive to the natural local and global environment and understand the importance of conservation and sustainable development.
5. Are acquiring and developing a range of skills in outdoor activities, fieldwork, exploration, journeys and expeditions.
6. Are demonstrating increased initiative and innovation, enthusiasm, curiosity, self-reliance, responsibility, perseverance, tenacity and commitment.
7. Are developing and extending their key skills of communication, problem-solving, creativity, critical thinking, leadership and co-operation.
8. Are learning to appreciate the benefits of physical activity and the lifelong value of participation in healthy leisure activities and reflection.
9. Are displaying an increased motivation and appetite for self-directed learning that is contributing to raised levels of attainment in other aspects of their development, as well as becoming concerned, responsible and fulfilled citizens.
10. Are broadening their horizons and becoming open to a wider range of employment opportunities and life chances.
11. Giving young people responsibility for achieving these outcomes helps them to learn from their successes and failures.

## 3 Scope

The LA has formally adopted the Outdoor Education Advisers’ Panel “*National Guidance*” (NG) available at [www.oeapng.info](http://www.oeapng.info). Links to specific guidance documents on the OEAP website will appear throughout these procedures. **These documents are essential to the proper understanding and implementation of our procedures and all employees and volunteers acting on our behalf are expected to refer to them and follow their requirements and recommendations when planning and leading LOtC off site.** Hold down ‘control’ on the keyboard and click on any word or phrase underlined in blue text to download the relevant guidance document or to jump to a particular section of these procedures.

Any further clarifications of employer expectations which are necessary will be outlined in these procedures or can be sought from Davinia Pybis, Educational Visits Coordinator.

Off site visits are divided into two nationally recognised categories each of which have different procedural requirements outlined in [Procedures](#) below.

**Category 1** visits are broadly defined as day or evening activities that are relatively simple in the complexity of staffing requirements, activities, group needs, and environment. Category 1 visits and their leaders are vetted internally and require approval from the Headteacher and EVC as a minimum.

**Category 2** visits are broadly defined as those which require enhanced planning with event specific risk management to reflect the increased complexity of staff competence requirements, activities, group needs, and challenging

environments, and are typically overnight stays and adventurous activities. These visits must be approved by our employer, the Local Authority (LA) via Evolve and we source the competent health and safety advice in this area, that the law requires us to have access to, from the LA Outdoor Education Advisor (OEA).

Physical Education, School Sports and Physical Activities (PESSPA) such as curricular swimming, sporting tournaments etc. are governed by these procedures only in respect of the journey to and from an off-site venue unless it involves an overnight stay. Conduct of PE activities is otherwise governed by our normal PE procedures/the PE Department's Code of Practice, activity risk assessments, and any current guidance from a relevant sporting National Governing Body or the Association for Physical Education ([AfPE](#)).

Work experience activities as defined in the publication *'Work Experience: a guide for secondary schools'* (DfES 2002) are not governed by these procedures.

To ensure best value and quality assurance in all learning outside the classroom, brainstorming benefits and learning outcomes is embedded in the visit planning process. Targeted learning outcomes are recorded and communicated appropriately to everyone involved including parents in pre-visit information and visits are reviewed and rigorously evaluated within a framework of safety and quality.

#### **4 Roles and Responsibilities**

##### **5 The employer**

The LA is our employer and they have delegated to our governing body the responsibility for ensuring that in our school:

- governors understand the extent of their delegated role and responsibilities as set out in OEAP documents [3.2a: Underpinning Legal Framework and Duty of Care \(legal responsibilities\)](#) [3.1a: Requirements and Recommendations for Employers \(employer responsibilities\)](#); [3.4f: Member of a Management Board or Governing Body \(governor responsibilities\)](#), [3.3c: Management Board and Governor Check List \(action to take to be effective\)](#), [other relevant guidance these documents refer to, and LA requirements published to members via the School Portal and Evolve](#);
- there is a systematic approach to assessing and approving visit proposals via Evolve (see [Procedures](#) below); and
- there is a systematic approach to performance monitoring and evaluation of the effectiveness of the LOtC we provide, including a performance assessment/review at least annually using [5.1a: Establishment Self Evaluation form](#) in line with the guidance in [5.1c: Learning outside and off-site visits: self-evaluation using the Ofsted framework](#) (see [Visits Evaluation and Monitoring](#) below).

The LA has delegated the task of approving all visits via Evolve to the Head teacher, **except for** Category 2 overnight visits and adventure activities which are given final approval by the LA OEA also via Evolve. **The LA Outdoor Education Advisor (OEA) can be contacted on Tel: 017687 72005 (office hours); 0300 303 1042 (out of hours emergencies) or Email: [evas@sunderland.gov.uk](mailto:evas@sunderland.gov.uk).**

##### **6 The Head teacher or Manager**

Our Head teacher, is responsible for ensuring that they understand and fulfil their role and responsibilities in law; as a governor (described in [Section 2.1](#) above); and as set out in OEAP documents [3.4g: Head Teachers/Managers \(Head teacher responsibilities\)](#), [3.3b: Head or Manager Check List \(what Head teachers can do to be effective\)](#), and [other relevant guidance documents they refer to](#).

More specifically the Head teacher will take steps to ensure that:

- the general visits principles and arrangements outlined in Checklist 3.3b apply to the LOtC we provide;
- our procedures clearly set out how visits should be planned and managed to address the responsibilities they hold outlined in document 3.4g, for example, expectations of leader competence, employer requirements when choosing contractors, visit evaluation requirements etc.
- all LOtC complies with these procedures and any relevant OEAP good practice guidance i.e. by logging into Evolve, reviewing proposals (in line with the Visit/Activity Specific section of Checklist 3.3b), and applying their online approval, and
- where charges are made to parents, they comply with our Charging & Remissions Policy, and procedures are in place to account for the finances of visits (see [Finance](#) below). Our policy is available to staff and published to parents through the school website [www.uvhs.uk](http://www.uvhs.uk)

## 7 The Educational Visits Coordinator

Our EVC (Davinia Pybis), was selected using the criteria outlined in OEAP document [3.4j: Educational Visits Coordinator \(EVC\)](#). They are responsible for ensuring that they understand and fulfil their role and responsibilities as set out in OEAP document 3.4j ([EVC key requirements and responsibilities](#)) and [3.3a: EVC check list \(what EVCs can do to be effective\)](#), and other relevant guidance documents they refer to.

More specifically the EVC will take steps to ensure that:

- the general visits principles and arrangements outlined in Checklist 3.3a apply to the LOtC we provide;
- all LOtC complies with these procedures i.e. by logging into Evolve and reviewing the visits submitted by visit leaders (in line with the Visit/Activity Specific section of Checklist 3.3a), before applying for approval online from the Head teacher;
- they champion LOtC and challenge colleagues to use visits effectively to provide a wide range of pupil outcomes, contributing to our overall effectiveness.
- they support/oversee visits planning by providing clarification to visit leaders and by monitoring things like how appropriately helpers are being used, the early resolution of specific issues like managing SEND, obtaining Enhanced DBS Disclosures, access issues etc.
- they mentor leaders and aspirant leaders, contribute to assessment of their competence, support their ongoing development, sample monitor their activities to identify any further training needs, and ensure succession planning begins as soon as notice is received that a key member of staff is leaving; and

## 8 Visit leaders

Our leaders are selected using the [key requirements and responsibilities](#) criteria outlined in OEAP document [3.4k: Visit or Activity Leader](#). They are each responsible for ensuring that they understand and fulfil their role and responsibilities as set out in [3.4k \(providing evidence as necessary\)](#), and [Educational Visits Request Form which outlines what they can do to be effective](#).

All leaders are expected to have an understanding of and use for reference as necessary the OEAP guidance in sections 4, 6 & 7 of the [OEAP Library](#). [For more information about specific leader competence assurance procedures for higher risk undertakings like adventure activities, see Induction, Training, Apprenticeship and Succession Planning below.](#)

Visit leaders must:

- ensure their activities comply with these procedures i.e. by logging into Evolve and inputting enough data and uploading enough supporting information which adequately outlines visit arrangements **before** carefully reviewing their visit (in line with the relevant parts of Checklist 3.3e), **and then** applying for approval online from the EVC **no less than** 6 weeks prior to the visit;
- ensure any final amendments like last minute medical updates or attendee lists, are given to the EVC for approved entry or upload online before departure;
- show in their planning appropriate due diligence (reasonable investigation – into the needs of the group, the suitability of third party providers etc.) and a clear understanding that the overarching duty of care for pupils remains with us, even when responsibility is shared with an activity provider who is leading i.e. clear handovers, briefings to all supervisors about how to stop an activity at the first appropriate moment if concerned etc.
- evaluate all aspects of a visit, both during and after the event, and contribute to the annual performance assessment/review of LOtC; and
- record and report all accidents and near-miss incidents in accordance with [Accident/incident recording and reporting](#) below and RIDDOR (the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations, 2013) i.e. reported to the appropriate employer.

## 9 Assistant visit leaders

[While we have not made it a blanket requirement for all off-site activities, where possible, a visit will have an assistant leader who is sufficiently competent, resourced, and briefed to take over from the visit leader in an emergency.](#)

Our assistant visit leaders are selected using the criteria outlined in OEAP document [3.4l: Assistant Leader \(typical expectations and responsibilities\)](#).

Assistant visit leaders must:

- suitably fulfil the ‘*typical expectations and responsibilities*’ outlined in OEAP document 3.4I (as applicable to their activities), and as agreed with the EVC (providing evidence if required).
- be sufficiently involved in planning and preparation for the visit, including contributing to the risk management plans.
- ensure they understand their role and responsibilities and how to work alongside other staff and the visit or activity leader.
- contribute to evaluation of the event.

## 10 Helpers

A helper is an adult who has an agreed role during a visit, but who is not a visit leader, assistant leader, activity leader, or participant. For example, a helper might be an inexperienced member of staff; a parent; or an apprentice, student or trainee. If our risk assessments talk about “supervisors”, they might be experienced members of staff leading subgroups, or they might be helpers who more often supervise groups alongside an experienced member of staff.

Any child (aged 15 and under) or young person (aged 16 or 17) in a helping role will **not** be regarded as a supervisor in the supervision ratio count.

All helpers will be subject to a recruitment and vetting process proportionate to what they are being asked to do. If it involves activity leadership this might include providing evidence of qualifications and undertaking an Enhanced DBS Disclosure for Regulated Activity in line with our expectations of employees. For more information see [Vetting and Safeguarding](#) below.

The minimum requirement is that they are competent and confident in what they are being asked to do, and that they understand our policies and procedures insofar as they affect what we are asking them to do.

Leaders must ensure that helpers who do not have an Enhanced DBS will **never** be left in sole charge of pupils or asked to carry out sensitive supervision such as giving prompts or physical help to pupils to eat, toilet, dress, wash etc. Arrangements will also ensure that inexperienced helpers will be accompanied by experienced helpers or staff. Helpers will be given access to a copy of OEAP document [3.4m: Helper](#), and the leader must ensure they:

- Are briefed appropriately about, the pupils (including age, health, capabilities, special needs, safeguarding & behavioural issues) and the nature and location of the activity.
- Can report concerns during a visit to the visit leader or assistant leader as soon as possible.
- Understand that any role assigning leadership with direct responsibility for their own child is avoided for good practice reasons unless otherwise agreed for sound risk management reasons e.g. the child’s age, maturity, or SEND; and
- contribute to the evaluation of the event.

## 11 Pupils

Our Whole School Behaviour Policy and Codes of Conduct apply to all off site visits and will be suitably reinforced before every departure and during visits. Sometimes, event specific additions might be made to the pupil Code, but expected conduct, rewards and sanctions will be made clear to everyone involved.

When planning visits leaders will:

- consider SEND, medical, behavioural and other significant risk management issues at the earliest stage of planning and in consultation with the relevant specialists if necessary;
- ensure any pre-conditions placed on a pupil’s participation, such as suitable health or behaviour, are in line with our policies and are properly communicated to and agreed with the pupil (where possible), parents and anyone else relevant to decision-making **before** any deposit that is not fully refundable is paid;
- involve young people in the risk management process in ways appropriate to their age, ability and level of understanding e.g. Duke of Edinburgh’s Award participants writing their own risk assessment for camping).
- before going on the visit, provide pupils with all the information they would need to be able to complete OEAP document [3.3f: Young People Check List \(outlines the key information they should have\)](#).

Any child (aged 15 and under) or young person (aged 16 or 17) in a helping role (see [Section 2.6](#) above) is to be regarded as a pupil in the supervision ratio count and **not** as a supervisor.

## 12 Parents or those with parental authority

In written communications and face-to-face meetings where appropriate, parents can expect us to:

- Encourage them to read OEAP documents [3.4n: Guidance for Parents](#) (aimed at parents explaining what 'informed consent' means and the minimum mutual expectations parents and any organisation should have of each other when arranging off-site visits) and [3.4n: Parental and Guardian Check List](#) (outlines key information parents need before their children go on a visit).
- Provide clear information about:
  - what a visit entails so their consent can be properly informed;
  - any pre-visit preparation they need to take an active role in e.g. ensuring their child meets any pre-conditions for attendance and understands behavioural expectations and sanctions;
  - arrangements for sending a pupil home early (when there has been serious failure to meet the required standards of behaviour) or collecting a pupil before the end of a visit (when they have become ill) and how any costs will be met.
  -
- Ask for:
  - emergency contact numbers, where an appropriate adult can be contacted 24/7 during the period of the visit.
  - detailed personal information about a pupil to help us manage their wellbeing e.g. sleepwalking, bedwetting, swimming ability, phobias etc.
  - specific consent for a pupil to receive emergency medical treatment, including an anaesthetic or blood transfusion.
  - cooperation in only making indirect contact with their child if there is a home emergency (normally through a nominated Emergency Base Contact's telephone number provided to parents).

Other specific details that need to be provided in writing will also include (where relevant):

- Date(s) of visit.
- Desired visit outcomes.
- Times of departure and return.
- Location(s) where pupils will be collected from and returned to.
- Mode(s) of transport and the name of any travel agent facilitating the visit.
- Size of the group.
- The visit leader's name, supervision arrangements and whether any remote supervision will be taking place.
- Accommodation details.
- Arrangements for managing SEND.
- The pupil's responsibilities for their own health, safety and wellbeing, and the code of conduct.
- Full range of planned activities.
- Clothing and equipment requirements.
- Insurance arrangements.
- Pocket money recommendations.
- Charges, voluntary contributions and cancellation terms.
- Emergency contact details.
- Policy for the use of mobile phones and other devices by pupils.

The letter to interested parents / students should be sent to the Headteacher and EVC for approval. Once approved copies MUST be sent to the school office and the Finance Manager. This letter must include full details of the proposed trip / visit / journey / activity, together with the total cost to be charged. Reference should be made to the Charging Policy.

For more information about communication with parents and consent see [Procedures](#) below.

When a pupil looked-after is part of our community, we will have written agreement between the carer(s) (foster carers), and the legal parent or guardian (a Local Authority acting as a Corporate Parent), about the extent to which a carer can make decisions about visits or give consent for activities. It will make special reference to any limitations

e.g. whether they can travel abroad, participate in adventure activities, or need to avoid specific geographical locations.

Our aim is to treat children looked-after as much like any other pupil as we can and our Designated Teacher for children looked-after and children previously looked-after will lead on this. We also aim to treat their carers as much like any other family in our community as we can and will provide suitable information and support to try to achieve this.

### **13 Visits Procedures**

All visit leaders are expected to plan off-site activities in line with these procedures and the principles in OEAP document [9a: The Radar Introduction](#) (describes the boundaries of activities that are best covered by policy and procedures, and those that require enhanced planning and event specific risk assessment and procedures). They must also have an understanding of and/or use for reference OEAP guidance documents: [3.2f: AALA Licensing](#) (a good practice outline); [3.2h: Self-organised visits and the package travel regulations](#) (guide to the law and good practice arrangements), (outlines good leadership habits and lessons learned from accidents, with some useful pointers on preventing and managing them), and [4.2b: Residentials](#) (a good practice guide), where applicable to their visit.

### **14 Obtaining approval for Category 1 visits**

This category of visits and their leaders are vetted internally by our EVC and require final approval from The Headteacher.

Types of activities we class as Category 1 include:

regular or one-off activities like swimming in leisure pools open to the general public; visits to shops, churches, museums, parks, other schools, offices, theatres etc. regardless of the presence of water or whether they extend or begin beyond the normal school day.

- walking in parks, other public places or non-remote country paths (<300m above sea level **and** <1km from a road) regardless of the presence of water.
- field studies in environments presenting no technical hazards e.g. pond dipping, river dipping, bug hunting, pedestrian or traffic surveys.
- forest or conservation-based programmes regardless of the presence of water.
- day visits further afield to places like Newcastle, Manchester, and London.
- non-adventure sporting activities **not** involving an overnight stay e.g. netball, football, cricket, , swimming galas.
- Local cinema/theatre visits

Visit Leaders must:

1. Get approval in principle at the very outset of planning by making an appointment with the EVC and Facilities and Health & Safety Manager for advice and a Trips & Visits Pack. Copies are also available in the Headteachers office on the Educational Visits noticeboard and in the staff area of the school website. Complete the Educational Visits Request Form and await approval from the Headteacher/Staffing Coordinator (EVC). Consult Mr Naylor to ensure that the proposed dates are appropriate in terms of the school calendar.

**No visit arrangements may be made unless the outline proposal adequately addresses timetabling, finance, staffing, cover and provider quality assurance issues, or there is a clear plan to resolve them before any commitments are made.**

1. Identify benefits and learning outcomes and seek any further third-party provider assurances.
2. Once approval is confirmed you can book a meeting with the EVC and Health & Safety Manager to discuss plans risk assessments and create a new draft visit on Evolve. It is the visit leader's responsibility to enter data and upload supporting information like the letter home, itinerary, kit list, code of conduct etc. as and when it becomes available or confirmed.

3. Review generic procedures for managing emergencies and the applicable generic risk assessments considering the activities, locations, and needs of the group. **Experienced** visit or activity leaders are **not** expected to carry out a specific written risk assessment for Category 1 visits unless there is something exceptional about the activity, location or pupils. For more information about risk assessment requirements see [Risk Benefit Analysis and Risk Management](#) below. **Inexperienced** leaders will be mentored through the risk assessment process which might include needing to evidence their visit specific risk management plans in a written risk assessment for the first few visits they lead.
4. Give parents enough information about the visit for their consent to be properly informed using approved letter templates and offer them the opportunity to give/withdraw their consent as necessary. [See Section 3.3 to see if explicit parental consent is necessary. If you do need consent and have a blanket one, parents need a chance to withdraw it. If you have no blanket consent, they need to give it]
5. Carefully review their final visit proposal in line with these procedures and relevant parts of OEAP documents [and](#) submit it for EVC approval online **no later than** 6 weeks prior to the planned visit. If the visit is returned by the EVC for further action, visit leaders should edit and update the visit on Evolve and re-submit it as soon as possible.
6. Collate and distribute as necessary all visit emergency information e.g. medical conditions, special needs, behaviour, Emergency Action Cards, panic cards etc. **no later than** 2 weeks prior. This includes ensuring any last-minute updates are added online by the EVC.
7. Finalise ‘checking out’ and ‘checking in’ procedures for before, during and after a visit.
8. Evaluate the visit soon after return involving staff, volunteers and pupils as well where possible (for information on how see [Visits Evaluation and Monitoring](#) below).

## 15 Obtaining approval for Category 2 visits

This category of visits includes those upwards on the Y axis and/or to the right on the X axis on the OEAP Radar Graph indicating that enhanced planning with event specific risk management is required, or that activities require detailed planning to reflect challenging environments, locations, higher perceived risk activities etc. or to reflect more complex pupil needs, leader competency requirements etc.

Types of activities we class as Category 2 include:

Any overnight stay	Any overseas visit	Abseiling
<b>Any</b> adventurous activity <b>including</b> those led by an external provider	<b>All</b> activities in open country (>300m above sea level <b>and</b> >1km from a road)	<b>All</b> activities on the sea ( <b>excluding</b> commercial transport e.g. Ferry, launch)
<b>All</b> air activities ( <b>excluding</b> commercial flights)	<b>All</b> coastal activities where the tide is a hazard	Coasteering, coastal scrambling and sea level traversing
<b>All</b> forms of boating ( <b>excluding</b> commercial transport e.g. steamer, launch, Thames tour, canal cruise)	Caving, mining & underground exploration ( <b>except</b> open public guided tours with no special equipment required)	Extreme / “thrill-seeking” sports e.g. parkour, skateboarding, trampoline park, zorbing, etc.
Camping	Canoeing and kayaking	High level ropes course
Horse riding	Motor sports – <b>all</b> forms	Rafting or improvised rafting
Mountain walking (>600m above sea & >2km from a road)	River/gorge walking or ghyll scrambling	Road cycling, trail cycling or mountain biking
Multi activities (adventurous <b>including</b> those led by an external provider)	Rock climbing ( <b>including</b> indoor climbing walls)	Sailing, surfing, windsurfing and kite surfing
Powered safety/rescue crafts	Shooting and archery	Snorkel and aqualung activities
Skiing/snowboarding outdoors, indoors or on artificial slopes	Swimming ( <b>except</b> in UK pools open to the public)	Water skiing

Visit Leaders must:

1. Get approval in principle at the very outset of planning by either entering enough detail online and submitting an outline proposal to the EVC and having it returned with a note advising of in-principle approval, **or** by discussing it directly and receiving verbal approval to begin planning.

**No visit arrangements may be made unless the outline proposal adequately addresses timetabling, finance, staffing, cover and provider quality assurance issues, or there is a clear plan to resolve them before any commitments are made.**

2. Identify benefits and learning outcomes and seek any third-party provider assurances.
3. Begin the formal approval process by updating the outline proposal that was returned to them online with the note of in-principle approval (or by creating a new draft visit online if in-principle approval was given verbally) and entering data and uploading supporting information like the letter home, itinerary, kit list, code of conduct etc. as and when it becomes available or confirmed.
4. Review generic procedures for managing emergencies and the applicable generic risk assessments considering the activities, locations, and needs of the group, and make visit specific plans.

**All Category 2 visits require visit specific written risk assessments to be uploaded to Evolve, and some may also require a specific written emergency plan for the group or an individual.**

We expect the competent activity leader to be the named assessor on any risk assessment specifically relevant to an activity they are leading, even when they are not the overall visit leader. For example, our BOF qualified orienteering coach will assess the risks of the orienteering element of the residential because they are specifically competent to in a way the visit leader is not.

In limited circumstances, the EVC may instruct a visit leader that specific written risk assessment of the journeys involved, such as on a day trip to an adventure centre, is **not** required because the journey is simple and directly comparable with journeys undertaken for Category 1 visits where specific written risk assessment is not required. This is unlikely to ever apply to an overnight or highly equipped visit where the quantity of luggage or equipment carried will raise journey risks unless specially considered and managed.

5. Give parents enough information about the visit for consent to be properly informed using approved letter templates and offer them the opportunity to give their consent.
6. Carefully review their final visit proposal (in line with these procedures and relevant parts of OEAP document [3.3e: Visit Leader Check List](#)) and submit it for EVC approval online **no later than** 6 weeks prior to the planned visit. If the visit is returned by the EVC for further action, visit leaders should edit and update the visit on Evolve and re-submit it as soon as possible.
7. Collate and distribute as necessary all visit emergency information e.g. medical conditions, special needs, behaviour, Emergency Action Cards, panic cards etc. **no later than** 4 weeks prior to the planned visit. This includes ensuring any last-minute updates are added online by the EVC or an online Visits Administrator.
8. Finalise 'checking out' and 'checking in' procedures for before, during and after a visit.
9. Evaluate the visit soon after return involving staff, volunteers and pupils as well where possible (for information on how see [Visits Evaluation and Monitoring](#) below).

## 16 Communication and consent

**We don't need** parental consent to take pupils of statutory school age off-site on visits which we use to deliver any element of the national curriculum when it happens entirely within normal school hours. However we should still tell parents what we are planning to do because they have a parental right to withdraw their child from school for that particular activity. Parental consent is usually sought via ParentPay once payment is completed.

**We need** parental consent to take pupils off-site on visits which extend beyond normal school hours, are adventurous, or are overnight.

When we seek specific consent confirmation for adventure activities and overnight stays we send home a letter describing the visit with either a suitable consent slip on the bottom, (or the more detailed consent form which asks for current personal information like sleepwalking, recent injuries, swim ability etc.) for return with payment where applicable, or we send information home via ParentPay describing the visit and ask parents to apply their consent and make payment where applicable online. We are sensitive to families with online access issues, or who are unable to use online payment methods and we have alternative and discreet arrangements where we will supply letters with a consent slip and can accept cash and cheques.

If we take pupils to a facility that requires us to sign a waiver or disclaimer on behalf of parents, like a high ropes course, we will look for one that enables parents to read and sign it directly with the provider. Otherwise, we will provide parents with the full text of what we will sign on their behalf and specifically draw their attention to its importance. This might be a link to the facility's website where full details are published, or it could be a physical hard copy of the waiver.

**We don't need** parental consent to use personal data, including image or voice recordings when we use it for education purposes. Using the names, images and voices of children in their work and in displays inside school is a fundamental part of their education, personal development and how we celebrate them. Video and photographs taken on school trips are a rich source and this does not affect anyone's statutory rights (as described in our Privacy Notice). Anyone can raise any concern with any member of staff about our use of their or their child's data at any time and we must ensure the rights of the individual are upheld if we've got no good reason to refuse.

**We need** parental consent to use any video or photos taken on educational visits for other reasons such as marketing or self-promotion in publications and on websites or social media platforms directly managed by us or, with our permission, by others associated with us and this may include pictures that have been drawn by children. For more information please see our Data Protection Policy, available on the school X Dive.

**We don't need** parental consent to share children's personal data with a supplier or provider when the data is necessary to operate a contract with them. For example, a child can't cycle on a hired bike unless the provider knows how tall they are to supply the right sized bike, a child can't take part in certain water activities unless the provider knows if they can already swim, a child allergic to certain foods can't be kept safe from them if we don't tell the activity centre's kitchen etc.

Our school Privacy Notice includes a general recognition that there are times when we do this kind of data sharing. When we know we will need to share personal data with a specific third-party provider like this, we will obtain a copy of, or a link to that provider's Privacy Notice, passing it on to parents and drawing their attention to what it says **before** they sign any consent for their child to take part. This helps us ensure that any trips consent we have is "fully informed". If we don't tell families about this data sharing, we risk failing to ensure their legal rights e.g. the right to object, the right to have information about them corrected etc. and we risk not having fully informed consent for the visit.

Visit leaders must send an appropriate draft letter to suit their individual visit to the office manager, but may only use the relevant approved wording when they outline our arrangements for:

- charging, voluntary contributions & cancellation (where pupils change their mind about attending, or become unable to attend through injury/ill-health before departure), or are withdrawn by us for failing to meet any agreed pre-conditions, or any other relevant circumstances that we know are not insured;
- insurance (for more information on cover see [Insurance](#) below);
- place allocation procedures when visits are oversubscribed. Allocation of places by the "first come, first served" method including return of a deposit is not permitted because imposing financial conditions on securing a place discriminates against pupils of low-income families and does not comply with our equality duty;
- data sharing with third party providers, including where to find each provider's Privacy Notice;

To get a letter approved for sending to parents it must be emailed to the school office for typing and then sent for approval by the Headteacher and EVC.

When there is any kind of dispute about who is responsible for providing parental consent we will follow DfE Guidance Document: [Understanding and dealing with issues relating to parental responsibility \(Sep 2018\)](#) and we will comply fully with any court orders in effect. Where parents cannot agree, we might ask the parties in dispute to seek independent legal advice about obtaining a court order setting out exactly what decisions each parent can make in respect of the child (a Specific Issue or Prohibited Steps Order as appropriate).

## 17 Vetting and Safeguarding

All leaders are expected to have an understanding of and use for reference OEAP documents: [4.3e: Safeguarding](#) (guide to good practice safeguarding arrangements), and [3.2g: Vetting and Disclosure and Barring Service \(DBS\) Checks](#) (detailed guidance on deciding what vetting process needs to apply when people who do not already work in regulated activity accompany visits, most commonly volunteers and activity providers) when planning visits. They should seek to identify and address vetting requirements at the earliest opportunity. Where there is any doubt whether an individual requires an Enhanced Disclosure for Regulated Activity (commonly known as an Enhanced DBS with Barred List check), the Headteacher will make the final decision in consultation with the Designated Safeguarding Lead (DSL) as necessary.

Any safeguarding concerns which arise during a visit **must** be reported to the DSL/Headteacher at the earliest opportunity and we will ensure that the visit leader has appropriate 24/7 contact details for them. The visit leader must also have the appropriate local police and local social care referral information in case a pupil is in immediate danger away from their home authority.

Visit leaders must consider very carefully the safeguarding and data protection implications of providing pupils with emergency contact cards designed to be shown to a stranger if they need help that include where they are staying or contact details for their accommodation. They should also consider how appropriate it is to involve an un-vetted third party like a hotelier in incidents such as lost pupils. The school telephone number or the visit leader's trip mobile number may be more appropriate.

Careful consideration also needs to be given to whether the visit leader's trip mobile number should be provided to parents in case of emergency. If the group is caught up in a major incident, worried parents using the number might inadvertently put pupils in danger or stop the visit leader being able to seek help for the group. The EVC will advise.

### **5 Overseas Visits and Specialist Activities**

Some visits include activities with special and significant health and safety, or financial risks and they require careful consideration at the planning stage and throughout.

Leaders are expected to have an understanding of and use for reference the guidance in section 7 of the [OEAP Library](#) and document [3.2h: Visits and the Package Travel Regulations](#) where relevant to the visit they are planning. Often, the need will depend on how significant location specific hazards are i.e. a visit to a park to feed ducks is unlikely to need an in-depth understanding of OEAP document 7i: Group Safety at Water Margins, but a complex river study in a challenging environment will.

Such activities might include (list includes links to the numbered OEAP guidance):

[venture activities](#)

[7b: Duke of Edinburgh Award expeditions](#)

[7c: Collaborative Provision](#)

[7d: Using OEAP Outdoor Learning Cards](#)

[7f: Exchanges and home stays](#)

[7g: Farm visits](#)

[7h: Field studies](#)

[7i: Group Safety at Water Margins](#)

[7k: Unaccompanied Expeditions](#)

[7l: Camping](#)

[7m: Heritage visits](#)

[7n: Museums and Galleries](#)

[7o: Natural water bathing](#)

[7q: Overseas expeditions](#)

[7r: Overseas visits](#)

[7t: Provider-led study and sports tours](#)

[7v: Snowsport visits](#)

[7x Swimming pools](#)

[7y: Using armed services providers](#)

[7z: Visitor attractions](#)

[/isits and the Package Travel Regulations](#)

### **6 Induction, Training, Apprenticeships and Succession Planning**

The minimum expectations we have of all leaders is that they are accountable, confident and competent in line with OEAP guidance [3.2d: Approval of Leaders](#), so we follow an appropriate recruitment process which includes vetting, assessment and induction.

Volunteers who take a lead or solo supervision role will undergo the same recruitment and induction process as staff, but in proportion to what they are being asked to do. For example, a parent helper leading a sub-group solo as one of 10 sub-groups in a theme park (with several school staff available) will need a less rigorous assessment and induction than a parent helper who is a qualified climbing instructor and offers to lead a group climbing a local crag with one member of staff. There is plenty of support at the theme park, but if anything happened to our staff at the crag, the parent helper would be taking full charge and they need to understand the role and what would be expected of them.

Specialist activity leaders who we are responsible for under our Employer's Liability Insurance are required to provide evidence of their competence to lead such activities e.g. a suitable qualification or training certificate, a log book or summary of at least 12 of their most recent relevant activities, and in some cases, the testimony of a third party qualified to assess the individual as an instructor in their field. Advice must be sought from our LA OEA where necessary.

Our EVC will undertake the nationally recognised OEAP EVC course and attend regular refresher training every 3 years. We are also committed to investing in the continuing professional development of our staff wherever we can.

#### Risk Benefit Analysis and Risk Management

Leaders are expected to have an understanding of and use for reference OEAP documents, [4.3c: Risk management - an overview](#); [4.3f: Risk management - some practical advice](#); [4.3g: Risk management - what to record and how](#), on risk assessment and how to do it effectively and proportionately when planning visits.

New or inexperienced leaders will receive adequate induction, training and mentoring in visit procedures and especially our risk management expectations.

We expect them to involve all accompanying staff, and young people where appropriate, in the planning and preparation of visits, including risk management and recording of the risk-benefit assessments.

The only absolute requirement of risk assessment is that it must be suitable and sufficient. We have no set requirements on format but recommend using the templates available through Evolve.

**When planning Category 1 visits**, dynamic risk assessment as events unfold will be the primary key to keeping people safe. To ensure they are properly prepared, leaders must review our generic procedures for managing emergencies and the applicable generic risk assessment templates we recommend considering the activities, locations, and needs of the group. Experienced leaders are **not** expected to carry out a specific written risk assessment for these visits unless there is something exceptional about the activity, location or pupils. Experienced leaders should tick the declaration on the Generic Risk Assessment tab in their draft visit on Evolve and select the appropriate templates they have reviewed. Inexperienced leaders will be mentored through the risk assessment process which might include them needing to evidence their visit specific risk management plans in a written risk assessment to be uploaded to Evolve for the first few visits they lead. The EVC will direct them at the time they seek approval in-principle.

**When planning Category 2 visits**, leaders must review our generic procedures for managing emergencies and the applicable generic risk assessment templates we recommend considering the activities, locations, and needs of the group, and make visit specific plans.

**All category 2 visits require visit specific written risk assessments to be uploaded to the Custom Risk Assessment Tab on the risk assessment page of an online record, and some may also require a specific written emergency plan for the group or an individual.**

In limited circumstances, the EVC may instruct a visit leader that specific written risk assessment of the journeys involved, such as on a day trip to an adventure centre, is **not** required because the journey is simple and directly comparable with journeys undertaken for Category 1 visits where written risk assessment is not generally required. This is unlikely to ever apply to an overnight or highly equipped visit where the quantity of luggage or equipment carried will raise journey risks unless specially considered and managed.

## **7 Induction, Training, Apprenticeship and Succession Planning**

### **7.1 Our duty of care**

We expect all staff and, to a limited extent volunteers, to understand the key elements around our duty of care to pupils outlined in OEAP document [3.2a: Underpinning Legal Framework and Duty of Care as follows](#).

The staff, volunteers and third parties we engage to work for or with us have a legal duty to take *reasonable* care to avoid acts or omissions which could *reasonably* be foreseen to cause injury to anyone for whom they should *reasonably* have regard.

The legal expectations for the different standards of care are:

- non-specialist/non-professional adult (that of an ordinary ‘reasonable person’ - traditionally referred to as “what the man on the Clapham omnibus would do” e.g. a parent helper with no relevant professional skills).
- adult with expertise/specialist knowledge (that of a ‘reasonable professional’ - a higher standard than that of the ‘reasonable person’ e.g. staff or a parent helper with a relevant professional skill e.g. teacher, youth worker, childminder, social worker, activity instructor).
- employers (‘in so far as is reasonably practicable’ - the balance of cost against the benefits of putting controls in place and deciding what people do in our name - the highest standard held by governors).

This is why a leader’s understanding of our duty, the due diligence (reasonable investigation) required in selecting third party providers, and what to include in their briefings to helpers and third parties are so important. We understand that because we work with children, who the law sees as vulnerable due to their age and inexperience, our duty of care is non-delegable. This means that if a pupil suffers injury or loss due to the negligence of a third party that we engaged, we might be held at least partly responsible for what went wrong and if the third party’s insurance doesn’t cover the outcomes, our insurers could become liable.

We expect leaders to carry out adequate due diligence when engaging third party providers to deliver activities with clear handover procedures agreed.

All staff and to some extent volunteers must ensure third parties who are leading activities “take reasonable care” too. For this reason, pupils will not be handed over to the care of a third party without an accompanying member of school staff or helper unless there is a very good reason which has been adequately explained to those with parental authority and agreed to by responsible all parties.

## 8 Effective supervision

Leaders are expected to have an understanding of and use for reference OEAP documents, [4.2a: Group management and supervision](#) (outlining good practice guidance on arrangements for direct, indirect and remote supervision) and [4.3b: Ratios and effective supervision](#) (which explains what to consider when deciding what an adequate supervision ratio of competent adults to pupils might be) when planning visits.

**We acknowledge that there is no such thing as a definitive ratio for a specific age group undertaking a particular activity off site and we expect leaders to make decisions based on their risk assessment.**

Our best practice expectation for supervision on all visits is that there will be two competent adults, one of whom will be an employee, to suit the gender of participating pupils i.e. a male and a female adult when boys and girls will be present. **This is not an absolute requirement.**

Where single sex supervision only is available for a mixed sex group, this may be acceptable, but must be specifically drawn to the attention of those with parental authority in case they have any objection.

There may also be circumstances when a leader is remotely supervising pupils e.g. on Duke of Edinburgh expeditions. When this is the case, we will have a reciprocal care arrangement with other suitable adults **or** pupils will have the knowledge and skills to cope if their leader becomes incapacitated or fails to rendezvous with them as agreed, and they will be adequately briefed on what to do and equipped to do it e.g. the means to communicate, availability of support or extra funding etc.

Generic risk assessment templates that we might suggest our visit leaders use to help them plan the risk management of their visits could have guideline supervision ratios on them, but they are only ever “**starting points for consideration**”. They will only apply where the activity is relatively straightforward and assuming the group has no special requirements.

Leaders should be able to use the SAGE framework to explain their decisions and, particularly for Category 2 visits, consideration of the following should feature clearly in their visit specific risk assessment:

- **Staffing:** Who is needed/available?
- **Activities to be undertaken:** What do you want the group to do and what is possible?
- **Group characteristics:** How does prior experiences, abilities, behaviour and maturity, gender, any specific or medical/dietary needs affect plans?
- **Environment:** How do environmental conditions affect plans, and have we considered journeys too?

**Any guideline ratios must be used with professional prudence.**

## 9 Transport

Anyone making transport arrangements for our visits is expected to have an understanding of and use for reference OEAP documents [4.5a: Transport general considerations](#) (good practice guidance on making any kind of transport arrangements), and [4.5d: Seat belts and child restraints](#) (a guide to the law on providing the appropriate child restraints).

Drivers cannot supervise pupils and drive. If the age, maturity, behaviour, special or medical needs mean they need active supervision during a journey, another responsible adult must accompany the driver.

### Hired road transport with a driver

We have a list of appropriately licensed operators of coaches, small buses, minibuses and taxis who have demonstrated to us that they meet our requirements in line with relevant parts of OEAP guide [4.5e: Hiring a coach](#) (guidance on how to select a licensed UK operator to provide transport by road, the questions to ask and the evidence to see). The Finance Office can advise on suitable transport providers.

Before we use a new operator for the first time the Finance Manager will get enough assurances from them, in line with 4.5e, to add them to our list.

### Driving minibuses

Anyone making arrangements for us to drive pupils in minibuses, whether we own, hire or borrow them, is also expected to have an understanding of and use for reference [Driving school minibuses advice: schools and local authorities](#) (DfE advice on when employees with a car driving licence may drive a minibus and when a Section 19 Permit might be required), and OEAP document [4.5b: Transport in minibuses](#) (guidance on who can/can't drive a minibus on school business and good practice when managing and driving them, including outside the UK), and any relevant LA guidance when they plan journeys.

The school minibus is maintained by Cumbria County Council.

When staff volunteer to drive a minibus on school business they will undergo our approval process including completing relevant minibus training.

Anyone who arranges minibus transport, where our staff drive, must ensure they understand the licensing implications when drivers passed their car driving test **after 1 January 1997**. Only drivers licensed **before** that date will have Category D1 (not for hire or reward), licensing them to drive a minibus of any weight and tow a trailer on UK roads. Drivers licensed **after** that date will not have Category D1, so they are not licensed to drive a minibus at all on UK roads.

To be able to legally drive a minibus on UK roads, drivers without D1 on their licence, must display a valid Section 19 Permit in the windscreen of the vehicle they are driving. They are restricted to driving minibuses weighing a maximum of 3.5 tonnes (or 4.25 tonnes if they are adapted for disabled access) and may never tow a trailer. No charges will be made, or voluntary contributions requested for any journey involving self-driven minibuses or for anything in connection with the minibus journeys i.e. the activity at the end of it, unless a valid Section 19 Permit is displayed in the windscreen of the vehicle used.

We need one Section 19 Permit for every minibus we drive at the same time. We own 2 permits and they are kept in the Health & Safety Office. They are valid for 5 years and it is the responsibility of Emma Dyson, Facilities and Site Safety Manager to renew them when they become due.

A Section 19 Permit is not valid outside the UK which means that only drivers with a full Category D1 on their licence (without the 101 which signifies 'not for hire or reward') can drive a minibus on school business abroad. All other drivers are restricted to driving Category B vehicles such as people carriers or multi-purpose vehicles (MPVs) abroad.

### Transport in private vehicles

Anyone making arrangements for us to transport pupils on visits in privately owned vehicles is also expected to have an understanding of and use for reference OEAP document [4.5c: Transport in private cars](#) (good practice guide to the arrangements and checks required) when planning journeys.

All drivers, whether staff or volunteers, are required to undergo the same process to be approved to drive pupils in their own vehicles. Each driver must complete a [Driving Declaration Form](#) (which can be obtained from the EVC), provide evidence of insurance, and consent to online checks being carried out on their driving licence for motoring convictions, and their vehicle tax & MOT status where relevant.

Drivers who are our own employees are required to have the class of business use motor insurance for their vehicle which allows them to carry pupils on school business. They are reminded at least annually of their responsibility to

have this insurance and to advise us of any motoring convictions, medical conditions or medicines they are taking (as they arise) if they might affect their approval to drive.

Drivers who are volunteers are asked at least annually to refresh their Driving Declaration to reflect their continued understanding of their responsibilities, their current insurance renewal date, and consent to another set of online checks as required. If volunteers will drive pupils regularly, we instruct them to advise their insurance company of the regularity and to ensure their provider does not consider this volunteering requires business use and that their current cover is enough.

We understand that when we organise transport using parent or other volunteer helpers then the activity could be classed as regulated in any one of two ways:

- a). If the helper is alone in the car with pupils then there is arguably an element of supervision, and so this meets the activity definition.
- b). Driving a vehicle being used solely to transport young people under an agreement with the school also meets the activity definition.

The deciding factor is whether the same helper transports pupils 'frequently' or 'intensively'. If they do then this is regulated activity (see [Vetting and Safeguarding](#) above for requirements), if they don't then it's not. Those organising this kind of transport need to be aware of any vetting required at the earliest stage of planning.

When parents make private transport arrangements between themselves, those journeys will not be considered as being taken on our behalf and they will not fall under the scope of these procedures.

## **10 Assessing Facilities and Providers**

Leaders planning to use an external facility or provider are expected to have an understanding of and use for reference OEAP documents [4.4h: Using external providers and facilities](#) (outlines the difference between a facility and a provider and the research required to select appropriate ones); [4.4f: Assessing an adventure activity provider check list](#) (a checklist for visit leaders to use to assess their potential adventure provider); and [6a: FAQs: Asking for a provider's risk assessments](#) (which explains why risk assessments are rarely a helpful measure of provider quality assurance).

A single venue could be either a facility or a provider depending on what it's being used for. The local football stadium will be a facility when pupils are taken there to watch a match. The local football stadium will be a provider when pupils are taken there to have a professional coaching session with the hometown team. The difference is the control the third party has over what pupils do. At the match there is passive control by the stadium through barriers, signs, and stewards etc., but school staff have full active control over everything the group does. At the coaching session there is active control by the stadium who take complete charge of delivering a coaching session while school staff have passive control through the pastoral support they offer from the sidelines.

When selecting a third-party provider, leaders must look for suitable quality assurance markers like accreditations with relevant professional bodies. Adventure Activity providers must hold an AALA licence when they offer certain activities to children who are not accompanied by their own parents. For details and to check a provider's licence go to: [www.hse.gov.uk/aala](http://www.hse.gov.uk/aala). Providers that hold a Quality Badge and/or an AALA licence (if required) do not need to provide further assurances about the safety or quality of their provision. Only if the specific needs of the group or visit are particularly complex should there be further investigation of an accredited provider. For details of the Quality Badge scheme and to check a provider's accreditation status go to: [lotcqualitybadge.org.uk](http://lotcqualitybadge.org.uk).

If a provider does not hold a suitable accreditation which covers all aspects of their provision, leaders must use other means of gaining assurances about their operation. Using the OEAP Provider Statement Form (available from the EVC) is an effective way of doing so. Leaders should first look for a pre-prepared 'Provider Statement', sometimes called a 'Management Statement of Competence' or a 'Risk Management Summary'. If the provider has one and it addresses all the points in the form, they must not be asked to complete the form.

We do **not** expect leaders to ask a provider for copies of their risk assessments because they are unlikely to be qualified to understand, assess and, if necessary, challenge them. Instead they are expected to look or ask for information that will help them run a safe and successful visit.

It is not necessary to look for such accreditation or assurances from facilities that are open to the general public and where no arrangements are being made for them to provide activities or supervision, but they must still be assessed as suitable for the needs of the visit.

While websites, review forums and smart communications make it easier than ever before to gather information about facilities and providers, reliability can be questionable and there is no substitute for a preliminary visit, so we are committed to enabling staff to make them where necessary and possible.

If the leader is unable to answer yes to all the questions in checklist 4.4f in the section “Do you need to carry out a pre-visit to the provider?” they must discuss with the EVC whether they should. This cost may need to be built into the overall visit budget. Where a preliminary visit is not reasonably practicable, the leader should give special consideration as to how they will gather enough information to make an adequate assessment of their risk management and other issues.

## **11 Emergency Procedures and Incident Reporting**

Leaders are expected to put in place an adequate ‘Plan B’ for every visit in case something reasonably foreseeable goes wrong with the original plan e.g. the venue is unexpectedly shut, the weather turns, the car park becomes inaccessible, travel restrictions are introduced etc.

Leaders planning any visit which might be significantly affected by a terrorism-related incident are expected to read OEAP guidance document [4.4e: Terrorism](#) and plan accordingly.

Even if the risks of direct involvement in a terrorism-related incident are judged especially low, consideration must be given to how the knock-on effects of an incident elsewhere might end up directly affecting the group such as cancelled public transport, closed roads or stations, shut venues, very lengthy transport delays and security checks etc.

## **12 First aid**

Leaders are expected to understand and use for reference OEAP document [4.4b: First aid](#) when they plan provision for trips. It outlines the law and provides good practice guidance on making risk-based decisions about the first aid arrangements that might be needed.

Decisions about first aid must be based on the leader’s risk assessment and be recorded on Evolve. Because it might be important in a claim for personal injury compensation that we provided “suitable first aid”, the name and qualification of our first aiders accompanying a trip must be included.

Basic first aid support must always be available from either our own qualified adults or from the facility or provider. In some of the lowest risk circumstances the need might be satisfied by proximity to a local hospital or an urgent care/walk-in/minor injuries unit and the EVC will advise.

When visits include outdoor adventure activities led by our own employees or volunteers, the adventure activity leader will have a current and suitable first aid qualification, usually the 16 hours outdoor first aid course. When adventure activities are led by a provider, we expect leaders to see or receive assurances that there is adequate first aid available from the provider.

When visits include Duke of Edinburgh’s Award participants, our DofE Coordinator/Supervisor is responsible for ensuring that participants have the required first aid competence as detailed in the current DofE Expedition Guide. It is a legal requirement that all public service vehicles, including our school minibuses, carry a first aid kit. It is the responsibility of Emma Dyson, Facilities Manager and Site Safety Manager to carry out the periodic vehicle maintenance checks which includes all on-board equipment. It is the visit leader’s responsibility to check that the on-board first aid kit is present and correct before departure. If a vehicle’s kit is used on a trip, it is the visit leader’s responsibility to arrange for the kit to be re-stocked/re-stock the used kit as soon as possible on return.

Supporting pupils with medical conditions

Leaders are expected to have an understanding of and use for reference our policy on Supporting Pupils with Medical Conditions located on the school X drive and OEAP documents: [4.4d: Medication](#) (good practice guide to managing medicines and medical needs off-site); [6o: FAQs: Recognising and managing anaphylaxis](#) (the emergency action summary from the full [Department of Health: Guidance on the use of adrenaline auto-injectors in schools](#)); and; [Department of Health: Guidance on the use of emergency salbutamol inhalers in schools](#) (particularly the emergency action summary) where relevant, in taking account of medical needs in their visits planning.

Leaders must make themselves aware of how a pupil’s medical condition or medical needs might impact on their participation in off-site activities (primarily through development of their Individual Healthcare Plan (IHCP)). Leaders are responsible for ensuring their visit meets our equality and inclusion duties and that any reasonable adjustments necessary have been or will be made.

Leaders must also make themselves aware of the medical conditions or medical needs of all accompanying adults if they might have a significant effect on visit or contingency planning. Adults must be able to provide information on a need-to-know basis only with a reasonable expectation of confidentiality.

A pupil will only be excluded from an activity if the Head teacher considers, based on the available evidence, that no reasonable adjustment can make it safe for them, or when evidence from a clinician, like a GP or consultant states that an activity is not possible for a pupil.

The leader's risk assessment will need to specially consider planning arrangements and controls to support pupils with medical needs. Most of that work will have already been done in the Individual Health Care Plan. It may need updating in light of planned activities and be taken on the visit and/or uploaded to the online record.

Leaders must also take with them any forms or templates they need to manage or record the use of medicines.

Pupils who need emergency medicines like a salbutamol inhaler, or an Adrenalin Auto-Injector (AAI) will always carry one discreetly on their person (if competent to), and staff or another suitably briefed and trained adult will carry a spare. Leaders must ensure that they know whether they have parental consent to administer our school-owned inhaler or AAI to a pupil instead of, or as well as, their own prescribed medicine. All pupils with an Adrenalin Auto-Injector will have an allergy action plan which needs to be followed. We also have an asthma plan which we follow with any students with diagnosed asthma.

AAIs and other urgent care medicines like anti-histamines or paracetamol are never to be regarded as part of a first aid kit and should not normally be kept inside one, but for security and accessibility reasons they may need to be carried in travel kits while out on excursions and all accompanying adults must be suitably briefed about this on a need-to-know basis.

When arranging visits overseas, we expect leaders to consult [www.nhs.uk/common-health-questions/medicines/can-i-take-my-medicine-abroad](http://www.nhs.uk/common-health-questions/medicines/can-i-take-my-medicine-abroad) at least three months before the planned departure. By then, leaders must know whether anyone in the group needs to carry a syringe device; a UK controlled drug e.g. methamphetamine derivatives like Ritalin; or a drug that is controlled/illegal in the destination country or countries travelled through. This is because special travel documents may be required and can take time to arrange. In some circumstances, doctors may need to be asked to prescribe an alternative drug for the visit. When pupils will travel with a controlled drug, leaders must follow up the NHS advice by referring to [www.gov.uk/travelling-controlled-drugs](http://www.gov.uk/travelling-controlled-drugs), to include consulting with the relevant embassies and making suitable arrangements when a drug is controlled over there.

If there will be a pupil on the visit whose, life, health or education will become at significant risk if their medicine is lost, ruined by poor storage, or destroyed, there needs to be a proportionate plan to replace it as urgently as necessary. Leaders must know how to do this if they are overseas.

Leaders needing specific guidance about individual pupils regarding first aid or medical arrangements should consult the Parents, medical professional and School Nurse before seeking visit approval.

### **13 Accident/incident recording and reporting**

Leaders are expected to apply the general good practice leadership principles in OEAP document [4.1h: Avoiding Accidents and Emergencies](#) (outlines good leadership habits and lessons learned from accidents, with some useful pointers on preventing and managing them).

If a pupil or adult that we have a responsibility for is injured on a visit, it must be recorded in the accident book of the responsible employer, where there is one. At a hotel or any other place where people work, it would be reportable to them as a member of the public injured in their workplace. Depending on the need for hospital treatment or the severity of the injury, they would be responsible for reporting the injury at their workplace to the HSE under RIDDOR. It must also be properly recorded back at school. If there is no other responsible employer because it didn't happen at someone else's workplace, we must record it and we will be responsible for reporting a RIDDOR event to the HSE.

Leaders must follow our accident and incident recording procedures while away using an appropriate form to capture enough detail to make a proper report back at school. If the incident was serious this might include obtaining witness statements, taking photographs etc. to help us explain what has happened to parents and to provide useful evidence in case of a claim for compensation.

Detailed guidance on accident recording, reporting and investigation is available in our own Accident and Incident Recording and Reporting Procedures located in the Health & Safety Office.

### **14 Critical incident procedures**

As the employer, the LA has the ultimate responsibility when things go wrong but every individual that holds a designated role in the management of visits or visit leadership is expected to read, understand and seek any clarification on LA procedures or requirements they need about managing emergencies before any visit plans are finalised.

Our basic emergency planning for all visits involves providing all visit leaders with a contact number for a designated member from the senior leadership team, contactable out of hours. Giving each student an emergency contact card, to use should they become separated from the group.

### **Public Health Emergency Preparedness**

During a pandemic or similarly wide-ranging local, national, or international public health situation, we will use our judgement and government guidance in effect at the time to work out how to deliver learning outside the classroom effectively and safely.

Leaders will where relevant, be expected to consider:

- What the risks of the public health situation are and whether they have identified any individuals at particular risk and planned for them appropriately
- How they can reduce or eliminate risks effectively
- The potential impact of following local or national restrictions or sudden changes to them
- Whether adequate insurance is still in place, whether new exclusions or terms apply, and how to ensure parental consent remains properly informed in emergent situations.
- How to obtain adequate assurances about measures in place with providers and facilities to protect public health and find out what is expected from groups
- Whether an affected visit would also impact significantly on the safe running of the school afterwards e.g., if key staff must then self-isolate during a pandemic
- How to ensure record keeping supports public health action like contact tracing

At times this might mean a leader will need to do additional written risk assessment and those who are unsure should seek advice from the EVC.

## **15 Insurance**

Leaders are expected to understand and use for reference OEAP document [4.4c: Insurance](#) (a guide to insurance requirements and options) to ensure they understand what kinds of insurance cover could or needs to apply to their plans. They must also ensure they understand the extent and limitations of cover our existing insurance policies provide.

When the terms of any insurance policy will materially affect pupils and parents, we will draw their attention to these terms and advise about any significant gaps for example, when personal belongings or personal accident not covered (because there was no negligent party). The minimum information we will provide about our cover on request is the Schedule of Insurance (which values personal injuries and often sets other claim limits) and any exclusions and limitations. This is so that parents can make an informed choice about purchasing their own additional insurance cover.

When leaders choose a third-party provider to deliver activities where there is a real risk of a pupil sustaining a life-changing injury, such as during adventure activities or thrill-seeking sports, we require a minimum of £5m in Public Liability Insurance (PLI) cover. Leaders must see evidence of the cover that will apply during the visit, such as the certificate stating the amounts of cover and renewal date or a broker's Letter of Insurance Cover Confirmation.

Providers that hold a LOTC Quality Badge publish their PLI limit and expiry date on the register at [lotcqualitybadge.org.uk/search](http://lotcqualitybadge.org.uk/search). If the policy expires before the date of the visit, the leader must look for or ask to see the current evidence when it becomes available.

If we fail to secure enough PLI from a provider to cover the costs associated with an injury that a pupil suffers due to the provider's negligence, our insurance may be held liable if it was reasonable that we should have sought better cover (case law *Woodland v Essex CC 2013*).

## **16 Finance**

Trip leaders are expected to understand their role in providing best value and avoiding any significant visit deficit or surplus as well as in implementing our Charging and Remissions Policy. Accessed via the school X Drive.

Any payment terms, financial conditions or financial commitments will be explained to parents before we seek their consent so that they are fully informed.

Trip leaders are expected to cost visits carefully to ensure there is no deficit, and to also plan for any necessary contingency funding where it is simple, predictable and will arise under circumstances outside of our direct control.

For example, an activity on the Wednesday of the residential will cost £X. If the weather is wet the alternative activity will cost £2X. The visit leader should budget for the wet weather activity.

Visit leaders will be given access to enough contingency funding through insurance arrangements, or school debit or credit arrangements in the case of minor disasters like missed transport connections or lost tickets.

Money for any visit/activity must be paid in advance and not after the event, otherwise discrepancies will be met by the co-ordinator of the trips prior to any expenditure being incurred.

Each activity account will have its own unique number. Accounts will be opened by the Business Manager on production of a copy of the letter which has been sent to parents/carers /students about the activity.

All monies must be paid in via ParentPay. Any refunds will be made via Parent Pay, however cheque/bank transfer refunds may be obtained for students who have paid by cash or cheque, from the Finance Manager prior to the activity if there are sufficient funds in the trip account. Advance notice of at least one week is necessary if sums of cash are required on the day of your activity, if it is a foreign visit, please give more than two weeks notice.

There should not be a planned final credit balance. Any credits remaining in excess of £5 per student should be returned to parents/carers. Other balances will be disposed of as decided by the Headteacher in line with normal financial regulatory procedures.

A full list of names of students and staff participants and the income received from each participant must be prepared. It should also show clearly the names of those withdrawn, and any monies refunded.

At the conclusion of your visit, a final balance sheet should be completed and handed to the Business Manager, together with all relevant receipts for audit.

## **17 Visits Evaluation and Monitoring**

The LA expects governors to regularly monitor the implementation of our policies and procedures for LOtC, using reports to them from the Head teacher or EVC and OEAP document 3.2b.

## **18 Further Guidance**

### **OEAP**

All other relevant OEAP documents in sections [6](#) and [7](#) of the OEAP library that are not already specifically referenced above.

### **Ofsted good practice guides**

Available in section 4 of the OEAP library:

#### [4.6a: Good Practice - Neston High School](#)

How the school secures high attainment and levels of progress through a well-integrated curriculum with a broad programme of LOTC.

#### [4.6b: Good Practice St John's RC Primary School](#)

How this primary school regularly uses LOtC on its own site, in its local area and on visits and trips to provide rich experiences, promote safety, raise expectations and attainment for all, and narrow the achievement gap across the broad curriculum.

#### [4.6c: Good Practice Lavington Park Federation](#)

A journey of discovery at two small federated schools as they use the outdoors to improve learning provision and pupil engagement with pupil, focusing on the strategies to improve geography and other subjects as part of an integrated approach to the curriculum.

#### [4.6d: Good Practice - Netherfield Primary School](#)

How a primary school makes effective use of resources and space to provide children with outstanding indoor and outdoor learning experiences.

#### [4.6e: Good Practice - Farley Nursery School](#)

How a nursery plans imaginative outdoor activities to develop children's problem-solving, reasoning and numeracy skills, focussing on how using outdoor spaces helps to explore and cement concepts such as distance and height, which are more limited indoors.

#### [4.6f: Good Practice - Victoria Park School](#) (primary)

A review of the extent and range of learning outside the classroom in the natural environment (LINE) activities and their impact on staff and students.

[4.6g: Good Practice - Curledge Street Academy](#) (primary)

A review of the extent and range of learning outside the classroom in the natural environment (LINE) activities and their impact on staff and students.