

We will work to ensure that: 'The children and young people of Herefordshire have a great start in life and grow up healthy, happy and safe within supportive family environments'.

The Children and Young People's Plan for Herefordshire 2019 – 2024

Policy for the Management of Educational Visits 2023 - 2026

Introduction

Herefordshire Council recognise the importance of well-planned and high quality educational visits to young people. Educational visits, residential visits and activities in the local area as well as outdoor learning on school grounds play a vital role in meeting the demands of the National Curriculum, as well as providing opportunities to enrich learning, experience something new and raise motivation.

Employers and employees who organise visits and activities, have a duty under the Health and Safety at Work Etc. Act 1974 and other health and safety legislation to ensure reasonable risk management procedures are in place for the planning and organisation of educational visits. Employers are required to ensure that its employees are provided with:

- Appropriate guidance
- Access to advice, support and further training
- Suitable systems and processes to ensure those trained are kept updated

Herefordshire Council has adopted OEAP National Guidance as the framework for all visits - <https://oeapng.info>. This is a source of guidance and good practice for educational visits and activities and it is referred to as 'National Guidance' throughout this document. Herefordshire Council maintained establishments and their employees must follow the National Guidance, as well as the requirements of this policy.

Other Herefordshire, non-LA maintained establishments may also adopt National Guidance and this policy by contacting the Outdoor Education Adviser and having a policy statement in place that makes this relationship clear. This must have been approved by the establishment's governing body or management board.

Advice, support, training and access to further guidance can be obtained from the Outdoor Education Adviser. Contact details are detailed in Appendix 1.

Herefordshire Council use the 'Evolve' system to facilitate the efficient planning, management, approval and evaluation of visits. All staff that lead or accompany visits can access their own Evolve account, which is set up by their establishment's Educational Visits Coordinator (EVC). Evolve can be accessed via the website - <https://evolve.edufocus.co.uk/evco10/index.asp> then selecting 'Herefordshire Council' site.

This policy is reviewed every three years or sooner if there is a serious incident or accident on an educational visit or following a change in legislation or National Guidance.

1. Scope and responsibilities

Scope

This policy applies to all off-site educational visits including alternative provision, outdoor learning and adventurous activities regardless of location involving children and young people.

It applies regardless of whether the activities take place within or outside of normal working hours, including weekends and holiday periods.

It does not apply to work-experience placements.

Organisational Roles and Responsibilities

It is the responsibility of the establishment to ensure that all staff involved with visits, whether managing or leading them read and understand the policy and any revisions or updates are communicated effectively.

All employees and volunteers involved in the planning, management and leadership of all off-site educational visits and all outdoor learning and adventurous activities must follow this policy. In addition National Guidance sets out the responsibilities and functions of the following key roles:

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

Please refer to National Guidance 3.4, headed as above.

2. Establishment policy and procedures

All establishments offering activities within the scope of this policy:

- i. Must have a competent Educational Visits Coordinator who meets the requirements set out in National Guidance (please refer to National Guidance 3.4j Educational Visits Coordinator). If an establishment does not have a nominated and trained EVC, the role will rest with the Headteacher or Manager by default.
- ii. The EVC must complete training and revalidation as specified in the '**Educational Visits Coordinator Training and Revalidation**' section below.
- iii. Establishments must have their own Educational Visits policy which sets out their management and approval procedures. It is the responsibility of the establishment to ensure that all staff involved in visits, whether managing or leading them read and understand the policy and any revisions or updates are communicated effectively. All staff should have access to the policy. All Herefordshire Council maintained establishments must have an Educational Visits Policy that is consistent with OEAP National Guidance and this policy. This should be reviewed and updated regularly. Guidance on writing an Establishment Educational Visits Policy is provided on Evolve.

Consent and communication

Example consent forms for routine and non-routine visits can be found on Evolve.

A school must always get written consent for nursery age children. For over nursery age children, the below applies.

Routine visits are regular, repeated visits that are usually part of the curriculum and take place either on the establishment site or in the local area. They take place within normal establishment working hours, usually require no additional payment and the risks involved are covered by a generic risk assessment. For these routine visits, a blanket parental consent form can be used and obtained on an annual or termly basis.

Informed parental consent must be obtained for all non-routine visits, as well as gaining up to date emergency contact, medical, dietary and swimming ability information, where relevant.

Examples where specific consent should be obtained include:

- i. residential visits including camping and in-school sleepovers
- ii. adventurous activities
- iii. overseas visits

Parents must be given sufficient information to make an informed decision about the participation of their child. The communication system and information needed will vary depending on the nature and complexity of the visit. For more simple visits, a text or email may be sufficient. For more complex trips, information letters and parental meetings may be appropriate.

It should be noted that whilst 'verbal consent' may be a practical way to manage a problem on the morning of departure, it is far from ideal and should be regarded as a last resort. A note should be made of the time and date of the phone call, who made it and who gave consent. Please refer to National Guidance 4.3d Parental Consent and Informing Parents.

Establishments should take necessary records, such as parents' contact details and participants' medical information on a visit. However, they must be kept secure irrespective of how the data is shared or carried.

Please refer to National Guidance 4.4j Participant Information and Data Protection.

Staff competence

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

Educational Visits Co-ordinator Training and Revalidation

Every establishment operating under this policy must appoint a trained Educational Visits Coordinator. Newly appointed EVCs must complete Herefordshire Council's OEAP accredited EVC training course and thereafter attend a revalidation session every three years.

Competence to lead visits

There should be a clear process for approving leaders to lead visits or activities. Leaders must be accountable, confident and competent to lead the specific visits or activities for which they are approved. The Head or EVC (when the responsibility is delegated) must make a judgement about the suitability of that person to lead that group on that visit/activity in that environment.

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

- i. What are the leader's reasons for undertaking the visit?
- ii. Is the leader an employee and if not, is there a clear line of accountability?
- iii. Can the leader/leadership team appropriately manage the teaching and learning in addition to the health, safety and welfare of the young people?
- iv. Do all accompanying adults have a defined role?
- v. Is the leader organised?
- vi. Are the leader/leadership team competent in managing risk?
- vii. What experience has the leader of the young people he/she intends to lead?
- viii. What is the leader's and leadership team's prior experience of similar visits or activities?
- ix. Has the leader been inducted into the establishment's procedures?
- x. What experience has the leader of the environment/geographical area chosen?
- xi. Do the leader/leadership team possess appropriate qualifications?
- xii. If appropriate, what are the leader's and leadership team's personal levels of skill in the activity, and fitness level?
- xiii. If leading an adventurous activity, have all the leaders been 'approved' by the Headteacher and the Outdoor Education Adviser?
- xiv. Has the leader addressed medical, first aid and inclusion issues?
- xv. Is the leader aware of, and able to comply with all relevant guidelines?

The establishment should contact the Outdoor Education Adviser if there is doubt regarding the competence of a member of staff to lead an Educational Visit.

Visit Leader Training

Herefordshire Council can provide Visit Leader training courses for staff leading and supporting educational visits. These courses cover the planning and leadership of off-site educational visits, outdoor learning and adventurous activities. Contact the Outdoor Education Adviser for further details.

Please refer to National Guidance 3.2d Approval of Leaders

3. Planning and approval procedures

Learning Outcomes

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

Risk Management

Risk management is an inherent part of visit planning. It is maximising benefits whilst reducing risks to acceptable levels. It should be proportionate to the complexity of the visit being undertaken and must be recorded. The evidence may include:

- i. generic risk assessments/ operational procedures
- ii. specific risk assessments
- iii. other visit planning documents

Generic risk assessment templates are available on Evolve.

It is advisable to keep risk assessments up to date and reviewed at least once a year.

Risk management is the responsibility of the whole visit staff team led by the visit leader. Please refer to National Guidance 4.3c, 4.3f, 4.3g Risk Management documents.

Approval in principle

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

Pre-visits

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group requirements. Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement.

Self-led adventurous visits

Establishment staff proposing to lead adventurous activities must have appropriate experience and qualifications. They must be approved by their Head and Outdoor Education Adviser prior to the visit.

Working with providers

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

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

Please refer to National Guidance 3.2a Underpinning Legal Framework and Duty of Care

Where they are available, Visit Leaders should take advantage of nationally accredited provider assurance schemes to select suitable providers, such as the LOtC Quality Badge.

Checking providers

Where a provider holds the Learning Outside the Classroom (LOtC) Quality Badge, there is no need to seek further assurances regarding safety. However Visit Leaders should ensure that a Provider Statement is completed if no LOtC Quality Badge is held. An example provider statement can be found here - <https://oeapng.info/downloads/download-info/8q-provider-statement-wordversion> . Certain adventurous activities require an Adventurous Activities Licence (AALA/AALS) which will either be captured through an LOtC Quality Badge or a Provider Statement.

Accommodation

Appropriate checks and/or assurances should be sought. The accommodation at an LOtC Quality Badged provider will have been deemed appropriate for educational visits. The relevant questions on the Provider Statement can be used to help to gather key information. Please refer to National Guidance 4.2b Residentials for more information about accommodation checks.

Ratios and supervision

EVCs and Headteachers are responsible for ensuring effective supervision is in place on all visits. Please note the DfE prescribes ratios for early years – for more information, please refer to DfE Early Years and Foundation Stage Statutory Guidance.

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

- **Staffing** (including volunteers)

For example: Consider whether the adults have undertaken training, what level of experience they have and whether they know the group. Consider what level of competence is necessary (e.g. skill, knowledge, understanding, fitness) from all of the supervising adults. Ensure that all adults are competent for the roles that are assigned to them.

- **Activity**

For example: Consider the nature of the intended activity and whether it requires specialist knowledge and/or equipment. Consider whether the activities might be affected by the location (crowds, remoteness, access etc.).

- **Group**

For example: Consider the characteristics of the group and what prior experience they have of the activity and environment; also consider their ability and maturity. If any of the group has behavioural, medical or learning needs, ensure that these can be managed appropriately.

- **Environment**

For example: Consider the impact that the weather may have on the group, activity or travel arrangements. Be aware that environmental conditions can change dramatically and ensure that there is a Plan B where appropriate. Where relevant to the location and activity, the visit leader must have a good understanding of how water levels can change and be able to make appropriate judgements.

- **Distance**

For example: Consider how far the activity or visit is from the normal support mechanisms of the school and whether it is close enough to rely on immediate support from the school, or further afield where it cannot. The type of transport being used may impact on the level of supervision required (e.g. a coach journey may require a smaller supervision ratio than a visit using public transport). If the visit involves an overnight stay, a higher level of first aid competence may be necessary, and staff may need to operate a supervision rota for longer residential visits.

Please refer to National Guidance 3.2f AALA Licensing, 4.3b Ratios and Effective Supervision, 4.4b First Aid, 4.4c Insurance, 7.1a Adventurous Activities.

4. Herefordshire Council Procedures

Visit Management system

Evolve - the online planning and management system must be used by visit leaders for the planning and approval of ***D of E, visits over 50 miles from the establishment, visits in demanding***

environments, residentials, overseas visits and adventurous activities. All other visits can also go on Evolve if the establishment choose to use this system. Alternatively, there needs to be a clear system in place that shows that the visit is well planned, the staff are competent and that the visit has been approved by the EVC and Headteacher. The school's policy should be explicit about which local, routine, low risk visits and activities these arrangements will apply to.

Establishments may choose to identify a 'local learning area' and to use generic operating procedures. There is guidance on Evolve to help with this.

The Headteacher is responsible for approving each visit.

The visit leader must ensure that essential information is communicated with a named person in school when they go off-site.

Visits that **do not** require Employer approval should be submitted to the EVC in the time frame set out in the school's visit policy. Visits that **do** require Employer approval should be submitted by the Head to the Employer at least 10 working days prior to departure. Complex visits/activities should be discussed with the Outdoor Education Adviser in the early planning stages.

Refer to Appendix 3 for a summary and approval deadlines.

Adventure activities run on the school / establishment site should also be planned and approved through the online system – refer to Appendix 2 for a list of typical activities classed as adventurous for the purposes of this policy.

Overseas Expeditions require enhanced planning and establishments considering this should contact the Outdoor Education Adviser before booking – preferably at least 18 months prior to the planned event.

5. Emergency Procedures/ Incident Management

Heads/managers must ensure that there are appropriate Emergency Procedures in place for Offsite visits. There is a Model Emergency Plan on Evolve that can be adapted and used. Every visit leader and assistant leader must be familiar with emergency planning procedures and reporting. Incidents and accidents should be recorded as normal during school trips, including reporting to Herefordshire Council where this would normally happen.

Relevant emergency contact numbers should be carried by leaders at all times during an off-site educational visit.

In an emergency the Visit Leader (and accompanying staff) should follow the Visit Leader Emergency Checklist and the Emergency School/Base Contact should follow the Establishment Incident Plan.

The following should be in place for all visits:

1. Carried by Visit Leader & all accompanying staff:

- Group list
- All contact details (these may be held in school for local visits during school hours)
- Visit Leader Emergency Checklist
- Mobile phone
- Group first aid kit(s)

2. Held by Emergency Base Contact (e.g. head teacher/ senior leader back at school):

- Group list
- All contact details
- First Contact Form and Incident Log Sheet
- Visit Leader Emergency Checklist
- Establishment Emergency Plan
- 24/7 access to all visit details

Staff should undergo training at an appropriate level to ensure that they understand the procedures.

Emergency plans should be tested regularly at both establishment level and employer level.

Further training and advice can be sought by contacting the Outdoor Education Adviser. Please refer to National Guidance 4.1b Emergencies and Critical Incidents – An Overview and other emergency documents in section 4.1

Visit Incident Management

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

6. Monitoring of visits and procedures

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

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

Types of monitoring include:

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

Discussions with visit leader and the staff team

Feedback from staff, pupils, parents

Asking pupils about the visit

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

Monitoring can cover safety factors such as:

- i. Risk assessments are in place for the activity and the plan B activity
- ii. Evidence of staff training and competence
- iii. Personal Protective Equipment and other safety equipment
- iv. Transport including driver competence
- v. Suitability of venue and location
- vi. Weather and time of year
- vii. Emergency procedures including base contact and communication
- viii. First aid provision
- ix. Pastoral supervision

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

- i. Clear aims and objectives
- ii. Does the task/activity match the aims and objectives?
- iii. Proportion of time on task
- iv. Differentiation
- v. Progression
- vi. Pace
- vii. Appropriate level of challenge
- viii. Inclusion and special needs provision
- ix. Extension activities
- x. Assessment for learning
- xi. Relating learning to other contexts
- xii. Evaluation

Please refer to National Guidance 3.2b Monitoring and the example monitoring sheet in the Evolve resources.

7. Evaluating visits

As part of the Plan-Do-Check-Act holistic safety system, establishments are encouraged to evaluate each visit (or series of visits) and act upon their findings. This can be done on Evolve and should determine what went well, what went less well, how the visit could be improved, did the provider meet expectations and if this is a visit that can take place again.

8. Charges for Off-site Activities and Visits

The Education Act 1996, sections 449-462 sets out the law on charging, voluntary contributions and remissions for school activities in England.

Please refer to National Guidance 3.2c Charging for School Activities and DfE document: Charging for School Activities - <https://www.gov.uk/government/publications/charging-for-school-activities> .

9. Inclusion & SEND

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

The Equality Act 2010 states that an establishment (e.g. a school) must not discriminate against a young person because of one of the protected characteristics. There is a duty to make reasonable adjustments.

Establishments must have due regard to equality considerations whenever significant decisions are being made or policies developed. Consideration must be given to the equality implications from the start of the planning process, not as an afterthought.

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

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

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

Behaviour

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

Please refer to National Guidance 3.2e Inclusion, 4.4i Special Educational Needs and Disabilities and DfE Equality Act 2010: Advice for Schools - <https://www.gov.uk/government/publications/equality-act-2010-advice-for-schools> .

10. Safeguarding

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

Visit Leaders should:

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

Disclosure and Barring Service (DBS) Checks

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

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

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

Please refer to National Guidance 3.2g Vetting and DBS Checks, 4.3e Safeguarding and DfE Guidance - <https://www.gov.uk/government/publications/keeping-children-safe-in-education--2>

11. Insurance for Off-site Activities and Visits

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

Heads and Service Managers should note that insurance cover may be invalidated if they fail to adhere to the requirements of this policy and advice within National Guidance. Please refer to National Guidance 4.4c Insurance.

12. Liability Waivers

Schools should seek advice from their legal team and their insurers if a provider asks for a liability waiver to be signed before participation. Please refer to National Guidance 3.2i Contracts and Waivers.

13. Transport

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

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

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

Please refer to National Guidance 4.5c Transport in Private Cars, 4.5a Transport: General Considerations and 4.5e Hiring a coach and DfE document 'Driving School Minibuses' - <https://www.gov.uk/government/publications/driving-school-minibuses-advice-for-schools-andlocal-authorities> .

Minibuses

The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus. In addition on longer journeys consideration should be given to factors such as driver fatigue and comfort breaks.

It is vital to check legal and insurance requirements regarding who can drive minibuses. Holding current MIDAS training and certification is recommended. Please refer to National Guidance 4.5b Transport in Minibuses

Appendix 1

In accordance with the requirements of National Guidance the Outdoor Education Adviser for Herefordshire Council is:

Claire Prosser

Email: claire.prosser@herefordshire.gov.uk

Telephone 01432 383 208

The Council's 24 Hour Emergency contact is: 01432 260 000

Appendix 2

Types of visit

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

A demanding environment is where there is significant risk to the group, for example due to hazardous terrain (e.g. cliffs, steep slopes etc), remoteness (over 30 minutes walking time to the nearest vehicle access point) or the visit taking place close to or in open water.

Adventurous Activities - examples

Gorge Scrambling
Mine exploration
Caving
Potholing
Mountain biking, BMX and cyclocross
Kayaking
Canoeing
Stand up paddleboarding
Surfing
Body boarding
Windsurfing
Coasteering
White water rafting
Water skiing
Raft building
Kite surfing
Dragon boating
Scuba diving
Snorkelling
Open water swimming
Swimming in non- lifeguarded pools
Zorbing
Sailing
Climbing – rock and on artificial structures, indoors and outdoors
Ice climbing
Abseiling
High Ropes Courses
Hill walking
Fell running
Parkour
Mountaineering

Skiing
Snowboarding
Geography fieldwork (in hazardous environments)

<p>Archery Trampoline parks Paintballing Overseas expeditions Karting and motor sports Air activities (excluding commercial flights) Horse riding and pony trekking Shooting</p> <p>Any activity including camping, fieldwork and non-adventurous activities taking place in a demanding environment, as defined above.</p>
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Appendix 3

Timescales for approval

<p>Overseas Residential Adventurous D of E Over 50 Miles from establishment Demanding environments</p>	<p>Visits must be submitted to the Employer at least 10 working days before the visit. Approval responsibility headteacher and employer.</p>
<p>Routine Local Visits Other Single Day Visits</p>	<p>May be pre-approved in policy or approved on Evolve. This should be defined in the school's educational visit policy. Approval responsibility headteacher. Submission deadlines should be defined in school policy.</p>