



Educational Visits Policy

Policy approved and adopted: September 2020

Review date: September 2023

1. Introduction

This policy relates to any occasion when children are taken off the school site by a member(s) of the school staff for a planned educational purpose.

It applies to all pupils on roll at the school, all adults employed by the school, any volunteers (including parents), students on placement at the school, and any outside bodies (bought in or voluntary) that are involved.

Aim

At Cove Junior School, our aim is that all visits from school should be:

- Safe
- Educational
- Enjoyable

Rationale

Well-planned and executed educational visits provide our pupils with valuable experiences which enhance their learning at school. Providing a variety of 'real-life' opportunities for our children, enables them to achieve a fuller understanding of the world around them through direct experience.

Purpose

Educational visits will have a clearly defined educational purpose and can provide stimulus and support to work being covered as part of the school curriculum. It may be that a visit provides an effective stimulus at the start of a unit of work; alternatively, teachers may decide to use an educational visit at any time during a project to enhance and support the curriculum. Wherever or whatever the venue, teachers should ensure that the educational benefits to the children are maximised.

2. Employer's Policies and OEAP National Guidance

Before any school trip, consent must first be sought from the headteacher, or deputy headteacher in their absence. No pupil will be taken off-site without this prior permission. Whilst as much notice should be given as feasibly possible, it is not always practicable to set a specific time-frame on this as the school recognises last minute opportunities can become available, such as sporting fixtures.

As a member of the OEAP, Hampshire County Council, and therefore Cove Junior School, follow their advice, policies and practices. Due to the ever-changing nature of Outdoor Educational Visits, and the laws that apply to it, the advice, policies and practices will be accessed online and not downloaded.

These are available at: <https://oeapng.info/>

As a Hampshire County Council maintained school, we also adhere to their advice, policies and practices. These may at times differ slightly from the OEAP due to particular aspects of the authority and the localities we access, for example Calshot Activity Centre.

Again, the advice, policies and practices of Hampshire County Council frequently change and should once again be accessed online.

These are available to; <https://evolve.edufocus.co.uk/evco10/docs.asp>

As a local authority maintained school, we are expected to seek permission for certain types of educational visits from the authority. These visits include:

- Any overseas visit
- Any residential visit
- Any visit that includes any activities deemed 'adventurous' by the local authority

In each of these cases, permission must also be sought from the school's governing body and the school must also seek permission via the Evolve system, from the local authority, which is available at: https://evolve.edufocus.co.uk/evco10/ev2_0_createform.asp

This permission should be sought **no less than 6 school weeks prior to departure**.

In addition, there are specific school procedures that should be adhered to and these are set out in section 4. These should be read in conjunction with other whole school policies. These include:

- Best Value Statement
- Charging and Remissions Policy
- Child Protection Policy
- Data Protection Policy
- Emergency Response Plan
- Equalities Policy
- First Aid Policy
- Health and Safety Policy
- Safeguarding Policy
- Social Media Policy
- Staff Acceptable Use of ICT Policy
- Supporting Pupils with Medical Needs Policy.

3. Classification of Roles

This document provides an overview of the range of roles, and their interdependence, that are typical of establishments in fulfilling legal, organisational and educational expectations. The roles are:

- Governing Body
- Headteachers
- Educational Visit Coordinators (EVCs)
- Visit and Activity Leaders
- Assistant Leaders
- Helpers
- Volunteers
- Parents

Governing Bodies

Members of the Governing Body should view their main role as being "to enable and ensure"; otherwise described as being a "critical friend". The Governing Body should ensure that:

- It has a clear understanding of whether or not it is the employer of establishment staff and is fully aware of an employer's responsibilities under health and safety law.
- There is guidance in place - either its own or having formally adopted the Employer's guidance (e.g. that of a local authority)
- Robust systems support implementation of the guidance.
- They challenge in order to be clear about how outdoor learning and visits lead to a wide range of outcomes for children and young people and contribute towards establishment effectiveness.
- There is an establishment visits/outdoor learning policy and procedures – including emergency procedures – and it supports the principles of inclusion.
- The involvement of the Governing Body in the visit approval process is clear and approval and notification procedures operate effectively.
- There is a trained EVC who meets the employer's requirements, with a sufficient time allowance to fulfil the role and training to support the planning and delivery of visits and outdoor learning.
- There are monitoring procedures in place, activity is evaluated, good practice is shared and any issues are followed up to comply with statutory and employer's requirements.

You can find further guidance at: <https://oeapng.info/governors/>

Headteacher

The Headteacher should:

- Have an establishment visits/outdoor learning policy and procedures that conform to and follow the requirements and recommendations of their employer's guidance.
- Be aware that the appointment of an Educational Visits Coordinator (EVC) is critical to the implementation of this guidance. The EVC should be appropriately competent to their role (see below) and should be allowed sufficient time to fulfil the role, including attendance at OEAP-approved training. In the event that there is not a designated named member of staff, then the functions of the EVC will automatically be attached to those of the Headteacher.
- Keep the Governing Body informed about the delivery of visits and outdoor learning and their contribution towards establishment effectiveness. This is a standing item in the Headteacher's report to the Governing Body.
- Where needed, have access to expert advice such as from an accredited outdoor education adviser.

You can find further guidance at: <https://oeapng.info/head-manager/>

Educational Visits Coordinators (EVCs)

The EVC is the establishment's focal point for planning and monitoring visits and outdoor learning. In appointing an EVC, careful consideration should be given to:

- Significant experience of practical outdoor learning and visit leadership.
- Status within the Establishment that enables guiding of the working practices of their colleagues.
- In this school the Deputy Headteacher (Warren Gargan) is the EVC.

Sufficient time should be agreed to fulfil the role and to attend OEAP approved EVC training and update/revalidation as required. An establishment may choose to train more than one member of staff so that the administrative tasks can be separated from the operational functions.

For an EVC to be effective, their responsibilities and functions should be clearly stated in the establishment's policy providing clarity to:

- The role of the EVC in the formal approval process
- The nature of monitoring (EVC, governor, peer monitoring etc)
- What activities, if any, require consultation/approval from the adviser
- Where needed, access to expert advice such as from an accredited outdoor education adviser

The EVC should ensure that all visits meet the employer's and establishment's policies, procedures and requirements. This includes appropriate monitoring, evaluation and recording to ensure that the Headteacher and Governing Body can access the data they require.

You can find further guidance including the EVC's key functions at: <https://oeapng.info/evc/>

Visit and Activity Leaders

The Visit Leader has the overall responsibility for supervision and conduct of the visit. To ensure accountability and to avoid potential confusion, a single Visit Leader should be designated. If this role changes during a visit, a clear handover should be made. An Activity Leader is responsible for a particular activity during a visit.

The key requirements for Visit/Activity Leaders are that they must be competent to lead, confident and accountable, not that they hold a particular post, title or job description. ***To this end, it is an expectation that the Visit Leader be Open Country Trained.***

Being competent means that the leader has demonstrated the ability to lead to the level demanded by the visit, and has sufficient relevant experience and knowledge of the activities, the group, and the environments they will operate in.

Competence is a combination of skills, knowledge, awareness, judgement, training and experience. It is not necessarily related to age or position within the establishment. It is situational – a leader who is competent in one activity or environment may not be so in another, and it involves breadth as well as depth. Relevant experience is not necessarily gained by repeating the same thing several times, but by experiencing a range of different activities and environments.

Being confident includes the leader's capacity to take charge of a situation and their awareness of their abilities as well as their limitations.

Being accountable means that the leader has been engaged through a clear process which includes vetting and appropriate induction into the establishment's policies and procedures. Regardless of employment status, leaders must be clear about the chain of accountability and what is expected of them.

A Visit/Activity Leader must follow the employer's guidance and establishment policy and procedures.

A Visit /Activity Leader must ensure that the activity is properly planned including assessing the risks to ensure that there is wide understanding about what everyone needs to do. A Visit/Activity Leader must ensure that the roles and responsibilities of other staff (and young people) are properly defined and communicated, ensuring effective supervision.

You can find further guidance at: <https://oeapng.info/visit-leader/>

Assistant Leaders

Assistant Leaders should be:

- Accountable.
- Suitably knowledgeable about the establishment and employer policies/procedures as they affect the responsibilities they have been assigned.
- Specifically competent and confident to carry out such tasks as they are assigned, and to take over if the Visit Leader is incapacitated.
- Fully briefed to ensure that they understand the role and responsibilities expected of them.

The exact competence requirements should be guided by the assessment of the risks and what the Assistant Leader may be expected to do.

You can find further guidance at: <https://oeapng.info/assistant-leader/>

Helpers

Helpers should be:

- Subject to an appropriate vetting decision by Heads/Managers.
- Used appropriately and not used to replace an Assistant Leader.
- Suitably competent and confident to be able to carry out the duties they are assigned and understand how these integrate with other staff.
- Enabled to contribute to the evaluation of all aspects of the visit/outdoor learning.
- Appropriately briefed on:
 1. Relevant establishment and visit/outdoor learning procedures.
 2. Group characteristics, including age, health, capabilities, special educational needs, behaviour and any other relevant matters in the context of the visit/outdoor learning.
 3. Nature, location, and aims and learning outcomes of the activity.

Where the helper is a parent (or otherwise in a close relationship with a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise group management, particularly if there is a serious incident. There is a probability that the helper may be distracted by the needs of their own child, rather than looking to the needs of the whole group. ***This means that the Visit Leader should directly address this issue as part of the assessment of risks and not assign a helper to a leadership role which gives them a direct responsibility for their own child, other than where this is a risk-managed part of the plan.***

Volunteers

Depending upon an employer's policies, a Volunteer may take any role in a visit, including Visit Leader, Assistant Leader, Activity Leader, and Helper. Whichever role they are used in, they must meet the requirements of that role.

Parents

Parents should be aware of the following:

- Their right to full information.
- Their need to provide full information about their child.
- The requirements for parental consent (where applicable).
- The need for parents and young people to have a proper understanding of behavioural expectations and sanctions which may be set out in a Code of Conduct.
- The need to provide a 24/7 home emergency contact number.

You can find further guidance at: <https://oeapng.info/parents/>

4. Specific measures in light of the COVID-19 Pandemic

It is essential that all current government guidance is followed. It should therefore be monitored for any changes. This guidance was accurate as of July 2020.

As of September 2020, Educational Visits may resume. The following steps are designed to ensure that the group remains safe and should not prevent trips from taking place.

As a school, we will use our judgement, informed by the most recent government guidance, about protective measures and safe working practices during this pandemic, to decide what is appropriate in each particular circumstance. In making this decision, it is helpful to consider the 'SAFE' variables (Staff, Activity, Group, Environment).

In planning a trip, staff must review the standard operating procedures to ensure that they are familiar with them still and that they are still relevant. Whilst it is always advisable to carry out a pre-visit before any educational visit, this may not be possible because of restrictions that venues have put in place. Therefore, if a visit is planned to visit an indoor venue, such as a museum, shopping centre or sporting fixture, it is vital that clear communication takes place directly between the trip leader and the venue, especially in relation to the potential effects of COVID-19. For example, hand washing upon arrival may be required and therefore timings may need to be altered.

It is also vital that the trip lead secures a copy of the provider's standard risk assessment and one that specifically covers their COVID-19 precautions.

If a booking or financial commitment is made, the trip leader should clarify how the terms and conditions will apply to our group if the school, or the provider, have to cancel. It can not be assumed that the travel insurance will be able to recover any of the cost incurred (please also refer to the Insurance (14) and Finance (15) sections of this policy).

It is important to keep parents informed about the plans and the precautions the school is taking as they will be naturally concerned. However, it is advised that parent helpers not be used unless absolutely necessary.

If the planned activity is in an area open to the public, staff should consider carefully how they will ensure that the group is isolated from the general public.

The same attention should be given to hygiene when away from school, as are operating in class. For example:

- Regularly washing/sanitising hands before and after using shared equipment; before eating; after using the toilet; when getting onto transport; and when returning inside.
- Avoid touching objects shared by the general public – for example, a member of staff could hold a door/gate open for the whole group to avoid each person touching it.
- Avoid activities that focus on physical contact, such as holding hands.
- Sanitise equipment before use.

To achieve this, staff should carry antiseptic hand gel, antiseptic wipes, packets of tissues and bags for waste. The designated first aiders should also carry face masks, gloves and disposable aprons in case a person becomes symptomatic or there is excess bodily fluid.

During some activities, it may be possible to designate or mark out 'zones' within which groups/bubbles then work. This is group practice anyway, especially in the outdoors. It can be achieved by using natural or pre-set features such as footpaths, hedgerows, trees etc or with a throw rope laid out on the floor.

At the point that this policy was reviewed, the government advises against the use of public transport if it can be avoided. Where walking or cycling is not possible, dedicated transport should therefore be used. When using dedicated transport, it is important to consider:

- Asking the provider to supply a copy of their COVID-19 precautions.
- How pupils are grouped on transport. Where possible this should reflect the bubbles that have been adopted in school.
- Use of hand sanitiser upon boarding and/or disembarking.
- Additional cleaning of vehicles.
- Distancing within vehicles, where possible, especially of adults.

5. Procedural Requirements

Parent information

Parents should be given information about the purpose and details of the visit at least two weeks in advance. Parents need to be aware that the teachers on the visit will be acting in their place – ‘in loco parentis’ – and will be exercising the same care that a prudent parent would. For residential trips, parents will be invited to a briefing session.

Parental consent

Routine visits in the locality of the school are covered by the parental consent in the ‘Consent Booklet’ completed on admission to the school. Cove Junior School will seek consent for all other visits. A parental consent form must be returned for each child in the group. However, electronic payment and verbal consent, if initiated by school, can be taken in some cases in the absence of written consent.

If parents wish to withhold consent, they will be invited to meet with the Trip Leader, Educational Visits Co-ordinator, Deputy or Headteacher to discuss their concerns. If consent is withheld, the pupil will not be taken on the visit but the curricular aims of the visit will be delivered to the pupil in some other way, wherever possible. If the parents give a conditional consent the Deputy or Headteacher will need to consider whether the child may be taken on the visit or not.

Preparing Pupils

Providing information and guidance to pupils is an important part of preparing for a school visit. Pupils should have a clear understanding about what is expected of them and what the visit will entail. Pupils must understand what standard of behaviour is expected and why rules must be followed. Pupils will be reminded that the school’s Behaviour Policy will still apply during these visits. Pupils should also be told about any potential dangers and how they should act to ensure their own and others’ safety.

Pupils with special educational and medical needs

The Headteacher will not exclude pupils with special educational or medical needs from school visits. Every effort will be made to support them whilst maintaining the safety of everyone on the visit. Special attention will be given to appropriate supervision ratios and additional safety measures may need to be addressed at the planning stage.

Staffing Ratios

It is important to have a sufficient ratio of adult supervisors to pupils. The following ratio of adults to children is recommended:

- Local Area Visits: A minimum of 1 qualified leader and a maximum ratio of 1:20
- Day Visits (coach travel): A minimum of 1 qualified leader and a maximum ratio of 1:12
- Residential/Overseas/Open Country Visits: A minimum of 1 qualified leader and a maximum ratio of 1:12.
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Where possible, the school aims to have a ratio of 1:8 on all visits. However, in practice, the ratio should be determined by factors such as type of activity, any SEN or medical needs, experience of the staff, venue, transport and weather conditions. Whatever the length and nature of the visit, regular head counting of pupils should take place. The Visit Leader should establish rendezvous points and tell adults and pupils what to do if they become separated from the party.

First Aid

First Aid provision should be considered when assessing the risks of the visit. As a school, we ensure all staff have up to date first aid training therefore, for all trips, a member of staff with a good working knowledge of first aid will be in attendance. As well as this, decisions based on the risks and children involved should be made for each visit. First aid kits should be taken on all visits. If the visit involves splitting into groups, a kit should be taken for each group. Larger first aid kits should be taken on residential visits. It is the Admin Assistant's responsibility to ensure that these first aid kits are replenished.

Transport

The majority of visits will either consist of the pupils walking or the use of a hired coach. However, the school also runs visits that involve train, mini bus travel, and the use of private cars.

When a coach is being hired, it is the responsibility of a member of the admin team to organise this in conjunction with the Trip Leader. In the event of more than one coach being used, then a qualified, experienced staff member should be put in charge of each coach and should have at least 2 other adults with them. In addition, Travel Packs should be taken on each vehicle, and this is usually organised by the school office. The Trip Leader must identify which groups are travelling on which vehicle prior to the visit, and must ensure that this is adhered to on the day of the visit as well.

It is becoming more commonplace for the school to access local minibuses. Usually these are hired from Rushmoor Volunteer Services (RVS). In this case, RVS will expect each driver to present their driving licence, MIDAS certificate and a copy of their driving convictions, which is available from: <https://www.gov.uk/view-driving-licence> . Should the mini bus be hired from a different location, then the Trip Leader must check all of these documents, and also check that the minibus has appropriate insurance, road tax and a valid MOT certificate.

Where possible, the school avoids the use of private cars. In some situations, such as sporting events, they are needed. However, it is usual practice for the parents to organise transport for their own child. In the event that school needs to organise the use of private cars then the Trip Leader needs to have copies of each drivers' insurance, MOT certificate and Road Tax (both are available online); in addition, each driver must be DSB checked. It is also the responsibility of the Trip Leaders to ensure that any booster seats are provided where needed. Booster seats are not needed on minibuses or coaches.

Should a member of staff be using their own car for transporting pupils, permission should be sought from parents and the driver must have presented their Business Insurance Policy to the Business Manager.

Keeping In Touch

It is a critical part of any trip for the Trip Leader to contact the Base Contact. This can be as simple as a 'check-in' and 'check-out' on a Local Area visit, or a text/phone call to say you are arriving or departing on a day visit. On residential visits, the Trip Leader should text/call the Base Contact at least daily, as well as at key points such as arriving or departing.

Evaluation

Whilst it is often not seen as a priority, it is really important to evaluate the trip after the event. Volunteers can have an evaluation form in their trip packs that they can complete on the return journey, and the Trip Leader can collect and hand it in to the EVC for review for the following year.

However, it is also important for the staff to review the trip together and evaluate the trip. There is a usual function on the Evolve system that can facilitate this process, and again, this information will be available for following visits.

6. Monitoring

It is a statutory requirement for an employer to monitor the implementation of their health and safety arrangements, including educational visits.

Our monitoring of off-site visits ensures that:

- Visits and activities are carried out safely and effectively and in line with the employer's policy and procedures.
- Relevant policies and procedures are reviewed and updated to remain current and in line with good practice.
- Employees have easy access to the employer's policy and to this guidance.
- Employees have access to relevant training that supports the implementation of this guidance e.g. Educational Visit Coordinator (EVC) training, Visit Leader training.
- The school has access to advice and further information to clarify the guidance issued.
- The school appoints, trains and revalidates EVCs in accordance with the employer's policy and this guidance.
- The school practices, including notification and approval procedures, comply with the employer's policy and follow this guidance.
- The school keep proper records.

The authorisation for ALL educational visits will be submitted electronically via Evolve. Where possible, this should be done at least 2 weeks prior to the commencement of the trip. This is automatically reviewed by the EVC and/or the Headteacher.

After Evolve has been monitored, the Trip Leader will need to ensure any amendments are completed before the trip – but not resubmitted through Evolve. Monitoring of health and safety should be done in such a way that it is a positive experience for leaders, with supportive feedback to enable them to reflect upon and improve their practice.

7. Induction and Training

Specific visit induction for new Trip Leaders, or for staff who are running complex trips, and in-house Evolve training, will be completed in conjunction with the EVC. This usually consists of a series of step-by-step sessions where the EVC guides the inductee through the process.

In addition, any Trip Leader will have completed Hampshire County Council's Outdoor Leader Training which needs renewing every 5 years. The EVC must also ensure that their training is up-to-date and should be renewed every 5 years.

It is not permitted for a student or NQT to lead an educational visit without an experienced member of staff accompanying them. The school aims to promote the development of all staff. Where possible, there will be a balance of experienced staff and new staff attending off-site visits, this includes residential visits. This inclusive approach ensures a secure basis for succession planning.

8. Risk Management and Risk Benefit Assessment

We can only eliminate all of the risk by stopping the activity - but we then lose all of the benefits. This is recognised by both the Health and Safety Executive and the Department for Education.

Risk management, in the context of outdoor learning and off-site visits, is a two stage process:

1. The identification of the potential benefits to be gained from an activity, along with any risks to the health and safety of those involved.
2. The implementation of a plan to best realise these benefits, using professional judgement to ensure that the level of risk does not exceed that which can be justified by the benefits.

Categories of Visit

There are two broad categories of visit requiring different levels of planning. The category of these is decided through the use of the Stage 1 Risk Assessment template on Excel.

1. Routine visits that involve no more than an everyday level of risk. Such visits should require minimal planning or preparation beyond what is needed to make best use of the learning opportunity. In our school context, they are simply lessons in a 'different' classroom.
2. Visits requiring additional planning, and some level of specific risk assessment. A visit moves into this category because one or more aspects cannot be managed adequately by existing procedures and policy. This may be due to distance from the establishment, the nature of the activities, the environment or venue(s), the nature of the particular group, the need for specialist leader competencies, or any combination of these. For some visits, this will involve detailed planning over an extended period of time. The additional steps needed to manage these aspects should be identified and recorded.

As part of effective Risk Benefit Assessments, a pre-visit should take place wherever practically possible. This is a vital element of the planning process.

Risk management involves answering two basic questions:

- a. What could go wrong? (Hazard identification)
- b. What are we going to do about it? (Control measures)

This process happens at three levels:

1. Generic – Policies and procedures that apply across a range of visits (normally recorded). This is guidance or practice that remains constant regardless of the nature of the visit. It covers the management of risks identified as relevant to all visits involving similar activities.
2. Visit-specific – Carried out before the visit takes place (may need to be recorded). This is the identification and management of any risks not already covered through generic risk management. It is unique to each occasion and should address staffing, activity, group and environment.
3. Dynamic/on-going – Carried out continuously throughout the visit (not necessary to record). This refers to the on-going monitoring of all aspects of the visit/activity by the visit leadership team. The group and the level of risk must be monitored and assessed throughout and, if circumstances dictate, activities should be curtailed or amended (e.g. change to plan B). In practice, it is often these on-going decisions of the Visit Leader(s) that determine whether the group remains safe and whether the activity is successful. Hence a competent visit leadership team is essential.

The formal recording of the risk assessment process comes in 2 stages.

Stage 1: The Excel template enables Trip Leaders to identify broad areas of focus for Stage 2. It gives an indicator score that should also help direct the Trip Leader as to the degree and severity of control measures they need to put in place. At this stage, should the result be 'red', the Trip Leader may decide that the hazards far outweigh the benefits, and therefore may decide to cancel the trip.

Stage 2: The Word template enables the Trip Leader to identify very specific hazards and control measures. This should be completed as part of, or soon after, a pre-visit. It is good practice for Trip Leaders to previous risk assessments as a starting point but these should not be simply copied. At this stage it may be necessary for the Trip Leader to identify individual pupils due to medical or behavioural needs, so they need to consider who, and how, this information is shared. **At this stage keep the actual risks clear and realistic, and the control measures simple and meaningful.** This document should be signed by the Trip Leader and the EVC/Headteacher.

It is crucial that all adults, and where appropriate, young people are involved in the planning process. Risk assessment is a part of the overall planning process and not 'tagged-on' afterwards.

Trip leaders must ensure that there is a prepared 'Plan B', should things go wrong. For most routine visits this may simply be to return to base. However, be aware that in some settings, the temptation to 'push on' when things start to go wrong has led to serious accidents and this temptation may be stronger if the only alternative is to 'give up and go home'.

More information can be found at: https://oeapng.info/search_gcse/?q=risk%20management

9. Assessing Venues and Providers

When planning an off-site visit, school will thoroughly research the suitability of the venue and check that facilities and third party provision will meet the group's needs and expectations. This is an essential element of risk-benefit management and is critical in deciding how staff will supervise effectively.

Provider or Facility?

A Provider means any third-party person or organisation contracted to organise and/or deliver all or part of a visit or activity, and may include support with supervision.

A Facility is a venue or resource, which will form part of a visit but where the Establishment Leadership Team will lead and deliver any activities. For example, visiting museums and galleries, theme parks, theatres when the venue does not provide teaching or instruction to the group.

Researching Providers

When choosing a suitable provider, school will consider the following questions:

- Do the values and ethos of the provider match our expectations?
- Can the programme be tailored to fulfil the learning outcomes of our group?
- What provision will be made for any special needs?
- Is there a clear understanding about the responsibility for supervision at all times during the visit?
- What are the respective roles of provider staff and our staff?
- How flexible is the programme to meet changing circumstances?
- To what extent will staff be able to involve the provider in evaluation of the visit's learning objectives?

School has a duty of care to ensure that the provider chosen meets acceptable standards. This may be as simple as checking that it holds appropriate accreditation.

Where the provider has no external accreditation, or where the group has particular special needs or programme requirements, checking may involve further questioning and information gathering.

Checking that the provider holds the Learning Outside the Classroom (LOtC) Quality Badge is the easiest way to confirm that quality and safety has been externally accredited. For details of the badge and to check a provider's accreditation status go to: <http://lotcqualitybadge.org.uk>.

Where the visit involves certain adventure activities, within the scope of the Adventure Activities Licensing Regulations 2004, then the provider is required by law to hold a licence from the Adventure Activities Licensing Authority (AALA). For details and to check a provider's licence details go to: <http://www.hse.gov.uk/aala/>.

When the provider holds a Quality Badge and/or an AALA licence (if required) there is normally no need to seek further assurances from the provider about the safety of provision. Only if the specific needs of our group or visit are particularly complex is further investigation of an accredited provider likely to be appropriate.

If a provider does not hold a suitable accreditation which covers all aspects of their provision, then school must use other means of gaining assurances about relevant aspects of their operation including:

- Insurance and compliance with legal requirements.
- Health, safety and emergency policies and procedures.
- Use of vehicles.
- Staff competence.
- Safeguarding.
- Accommodation.
- Sub-contracting.
- Number and location of different sites (in case the venue is split).

A Provider Questionnaire is an effective way of obtaining such assurances: <https://oeapng.info/downloads/model-forms-mind-maps-and-checklists/>

It is not necessary to look for such accreditation or assurances from facilities that are open to the public and where they are not providing activities, instruction, teaching or supervision. However, staff still need to be satisfied about the suitability of such facilities for the group.

It is essential to note that Hampshire County Council have a list of approved venues, and approved providers, which also includes travel and coach companies. This can be accessed through the Evolve help pages, or as staff complete the online authorisation. It is also valuable to know that should a provider or venue not currently be on the approved list, the Outdoor Education Team can, given sufficient notice, carry out these checks on school's behalf.

Researching Facilities and Venues

While the internet and the LOtC Quality Badge scheme have an important part to play in information gathering, there can be no substitute for a preliminary visit. This will back up research and enable staff to clarify issues face-to-face. So, wherever reasonably practicable, it is good practice to carry out a preliminary visit to any unfamiliar facility or venue, including those used by a provider. The cost of this can be built into the pricing of the visit.

Preliminary visits enable the Visit Leader to address the following questions:

- Will the venue or facility be suitable to meet the learning outcomes of the visit?
- Are there any particular hazards or threats which need to be considered in the risk-benefit assessment and emergency procedures?
- What will the options be if the conditions of daylight, water level, temperature and weather, or under-foot conditions, differ significantly from the pre-visit?
- Do you have sufficient knowledge and understanding of the venue, facilities and activities to feel confident when planning the visit?
- Will the venue be able to cater for the full range of group needs, including any special needs?
- Will the group need any specialist equipment? Are there any staff training needs?
- Will participants need to be prepared or trained?

It is useful for a Visit Leader to take a camera on a preliminary visit, as photographs can be a great aid to briefing both the Visit Leadership Team and the participants.

Where a preliminary visit is not reasonably practicable, you should consider how you will gather sufficient information to make an adequate assessment of the venue, facilities or provider.

In the absence of first-hand observations and credible assurances as set out above, you should seek information from reliable sources such as:

- Your Employer's Outdoor Education Adviser.
- Colleagues.
- Similar groups that have recently visited the venue or used the facility/provider.
- Reputable organisations such as tourist boards.

Risk Management Planning

Providers are responsible for assessing and managing the risks associated with their provision. Their risk assessments are likely to be technical and mean little to a visit leader unless qualified to understand, assess and, if necessary, to challenge them.

Providers are not responsible for producing a risk-benefit assessment for individual visiting groups – this is the responsibility of establishments/visit leaders who will know the needs of their groups.

What is useful to a visit leader is information from the provider that helps to make best use of the facilities or venue, and to plan appropriate supervision for their particular group.

Practical information (e.g. a site plan, photographs, local advice) obtained from the provider, together with the knowledge and experience from a preliminary visit, are likely to be the most helpful to visit leaders' decision making and planning.

10. Volunteers

In the majority of cases, the school's volunteers are parents, however, this is not always the case. A volunteer is categorised as an adult who is not directly employed by the school. It is important to note that it is most unlikely for a visit to take place without the support of volunteers. However, school would never expect a volunteer to assume the role of Trip Leader. This role will always fall to an employed member of staff.

Examples of how volunteers might be involved with visits include:

- A school asks a governor or a parent to help with supervision on a visit.
- A parent helps with transport, such as in the case of sporting fixtures.
- A member of the community who is an activity specialist leads an activity, or an entire visit e.g. a member of a local orienteering club offers to run a school orienteering club and take groups to weekend events.
- A teacher's partner / family member offers to accompany them and help with the school trip.

When using volunteers, it is essential that they meet the requirements for the role that they have been assigned. By default, this decision ultimately resides with the headteacher. The engagement of any volunteer must involve an appropriate level of vetting and induction. In the majority of cases this will require the individual to complete a DBS check if they do not currently have one. For further guidance and information on this please see the school's Business Manager. If the group are staying together, and the volunteer is not left unsupervised with a child or children, then it may be possible for them to attend without completing a DBS check. In this case they themselves would need to be closely supervised by the Trip Leader. **It is always preferable for ALL adults to be DBS checked prior to the visit.**

Prior to any visit, the Trip Leader should hold a briefing for all adults. The contents and level of training or induction needed will vary depending on the trip. A suggested itinerary for these briefings can be found on the school's system in *Teaching and Learning*. In addition to the briefing, and in accordance with the Data Protection Policy, a trip pack should be provided to all adults.

This pack should generically contain at least:

- 2 Stage Risk Assessments
- Itinerary
- Group Details
- Travel Arrangements
- Specific Requirements for the trip e.g. clothing and packed lunch.

They must be sufficiently competent and confident to carry out their responsibilities. The level of competence will depend upon the role that the volunteer is to take, the nature of the trip, and the degree to which they will be working independently or under supervision. Where they are working independently, it should be to the same standard as would be expected of an employee or contractor taking on the role. The decision as to whether a volunteer is competent lies with the trip leader. However, as a Trip Leader, if there are any concerns, they should be raised with the EVC or Headteacher, and a course of action agreed. If concerns are raised on the visit itself, the Trip Leader should take appropriate steps so that there are no risks, other than those previously identified, to the participants.

11. Emergency Procedures and Incident Reporting

When organising a school visit, the most critical document that the Trip Leader should have is the most up-to-date copy of the Emergency Response Plan. This contains the specific actions to take in the case of an emergency and the contact numbers of local authority support staff. Depending on the nature of the trip, and distance from school, it may also be advised for a second copy to be taken.

The Trip Leader should ensure that they have copies of emergency contact details for all pupils and adults (staff and volunteers) that are attending. In discussion with the EVC, it should be agreed as to who else should have a copy of this information, however it is recommended that at least one other member of staff carries this information. All contact information should be shredded after the visit, in line with the school's Data Protection Policy.

The Trip Leader should have also identified and briefed the necessary Base Contacts. During a day visit, this should consist of a member of the Senior Leadership Team plus another staff member, usually a member of the Admin Team. If the trip is outside of school hours, then the Base Contacts need to include a key holding member of the Leadership Team and a member of staff who has access to the parent communication system so that all parents can be contacted if needed e.g. if a coach is stuck in traffic. **In both instances, it is essential that the Trip Leader and Assistant have both the Base Contacts landlines and mobile telephone numbers.**

Wherever possible, in an emergency, it should be the Base Contact that makes contact with parents. The Trip Leader needs to focus on the group, managing the situation and liaising with other professionals.

For additional information, please refer to: oeapng.info/search_gcse/?q=emergnecy%20incidents.

12. Behaviour

Clear behavioural expectations will be established with all pupils, volunteers and staff at the pre-visit briefing. Where possible, these expectations should mimic the school's own behaviour code. On each visit, the Trip Leader should outline clear rewards and sanctions, such as methods to give 'time out', the ability to return a pupil to school/home for consistently poor behaviour, or behaviour that puts others at risk.

There may be a need for specific behaviours to be adhered to for individual activities e.g. for visits to religious buildings. In these cases, the pupils should be made aware as to why the adaptations have been made, and be given the opportunity to ask reasonable questions about it.

There may also be different rules that are put in place for certain types of trips. These will be agreed between the Trip Leader and the EVC/Headteacher. These may include:

- Buddy systems
- Adult ratios
- Use of electronic devices, including mobile phones.

Under certain circumstances, it may be necessary to establish 'behaviour contracts' either with identified individuals or with the group as a whole. In these cases, the contract will be shared and signed by the pupil, a parent and a member of the school staff. By signing this contract, the parents are agreeing to collect the child (as they would in the case of an in-school exclusion) should the Trip Leader view this action to be necessary.

Under extreme circumstances, and as part of the initial risk assessment procedure, individual pupils may not be permitted to attend a visit. There is more information in Section 13 about this.

13. Inclusion

The introduction of the Equality Act 2010, which replaced previous anti-discrimination acts and regulations, made only a few changes to the substance of existing law and it can be assumed that decisions made by the Courts in cases decided under previous law remain relevant.

The Equality Act states that the responsible body of a school or, for other provision, the service provider, must not discriminate against, harass or victimise a pupil or young person because of one of the protected characteristics (disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation) in the way that it provides (or not) a benefit, facility or service.

There is a duty to make reasonable adjustments.

Activities should be available and accessible to all, irrespective of special educational or medical needs or protected characteristics. When a visit or activity is being planned, all reasonably practicable measures must be taken to include all young people. Every reasonable effort should be made to find a venue and activities that are both suitable and accessible and that enable the whole group to participate fully and be actively involved.

The principles of inclusion should be promoted and addressed in policy and practice, ensuring:

- an entitlement to participate.
- accessibility through adaptation or modification, including the provision of auxiliary aids and services.
- integration through participation with peers.

Care should be taken not to cause indirect discrimination. For example, arranging a residential visit during a religious festival or holiday might prevent pupils of certain religions being able to attend.

In making decisions, an educational establishment may have to balance the need to provide the best possible educational outcomes for all pupils with the need to meet the particular needs of individuals. Sometimes it may not be possible to make reasonable adjustments to include a young person in a specific visit or activity, nor to provide the whole group with a suitable alternative, perhaps because of a severe disability. It is not necessary to deprive the rest of the group of worthwhile opportunities, if it is genuinely impossible to find a suitable way of including everyone. However, if a young person is excluded from a visit or activity, even for good reasons, the impact of this – such as on attitudes and relationships across a school – must be considered, and thought given to the provision of a suitable alternative. The burden of proof is on the establishment, to show that what happened was for a reason other than unfair discrimination.

Any adjustments that are made in order to include a disabled young person should not impinge unduly on the planned purpose of the activity or other participants therein. As an example, it may not be appropriate for a parent to accompany a child on a residential visit where the planned learning outcomes of the visit include "developing independence" and "developing relationships".

A decision to exclude a young person will not be taken lightly, and only after consultation with those who have responsibility for the young person, including (as appropriate) the head teacher, visit leader, class teacher, parents, any support staff, any third party provider, and possibly their GP.

Exclusion on the grounds of behaviour

It may be reasonable to exclude a young person where their behaviour presents a significant, unmanageable and unacceptable risk to the health, safety and welfare of either themselves, or other members of the group, or the leaders. The Equality Act protects people from discrimination and harassment based on the 'protected characteristics'. Where a young person has a behaviour difficulty that is not associated with a protected characteristic then it is unlikely that the Equality Act applies.

When a young person is excluded on these grounds, school should consider providing alternative ways of achieving the same learning outcomes.

Where there is some doubt about including or excluding a young person on the grounds of their behaviour, the following points should be considered:

- identifying the issue at the earliest stage of planning.
- involving all interested parties.
- establishing a behaviour management plan with agreed action points that may enable inclusion on the visit.
- establishing behaviour targets and timescales to be met to allow inclusion, or trigger a decision to exclude.
- providing an additional adult, such as a parent or support worker, with a specific brief to manage behaviour issues.
- ensuring that what is expected of staff is reasonable and within their competence.
- recording this process.

14. Insurance

As a local authority maintained school, all of our Educational Visits are covered by Hampshire County Council's insurance policy. This policy is updated annually and the latest version can be found at: <https://www.hants.gov.uk/educationandlearning/oe-pe-dofe/outdoor-education/insurance>

Trip leaders should be aware of any changes to this policy that have occurred as a result of 2020 COVID-19 pandemic. It is vital that trip leaders understand that the insurance policy may not cover their planned educational visit. In addition, schools may be responsible for any excess payments that may be incurred if the trip was to be cancelled.

The only exception may be when an individual pupil is unable to attend, for example due to illness or injury.

15. Finance

We are subject to the government's regulations on *Charging for School Activities*, which can be found at: <https://www.gov.uk/government/publications/charging-for-school-activities>.

Trip Leaders should actively seek the Terms and Conditions from any providers, especially in relation to costs relating to cancellations. The Trip Leader should ensure that these terms are understood, specifically concerning deadlines and costs incurred.

As a school, we will ensure that we will inform parents on low incomes and in receipt of the benefits of the support available to them when being asked for contributions towards the cost of school visits.

Any charge made in respect of individual pupils must not exceed the actual cost of providing the visit and must be divided equally by the number of pupils participating. It must not therefore include an element of subsidy for any other pupils wishing to participate in the activity whose parents are unwilling or unable to pay the full charge.

Furthermore, charges cannot include the cost of alternative provision for those pupils who do not wish to participate. Therefore, no charge can be made for supply teachers to cover for those teachers who are absent from school accompanying pupils visits.

Participation in any optional extra activity will be on the basis of parental choice and a willingness to meet the charges. Parental agreement is therefore a necessary prerequisite for the provision of an optional extra where charges will be made.

Nothing in legislation prevents school from asking for voluntary contributions for the benefit of the school or any school activities. However, if the activity cannot be funded without voluntary contributions, the governing body or headteacher should make this clear to parents at the outset.

The governing body or headteacher must also make it clear to parents that there is no obligation to make any contribution. It is important to note that no child should be excluded from an activity simply because his or her parents are unwilling or unable to pay.

If insufficient voluntary contributions are raised to fund a visit, or the school cannot fund it from some other source, then it must be cancelled. Schools must ensure that they make this clear to parents. If a parent is unwilling or unable to pay, their child must still be given an equal chance to go on the visit.

Residential visits

Schools can not insist on payments for:

- education provided on any visit that takes place during school hours
- education provided on any visit that takes place outside school hours if it is part of the national curriculum or part of religious education;
- supply teachers to cover for those teachers who are absent from school accompanying pupils on a residential visit.

Schools can charge for:

- board and lodging and the charge must not exceed the actual cost.

When a school informs parents about a forthcoming visit, they should make it clear that parents who can prove they are in receipt certain benefits will be **exempt from paying the cost of board and lodging**.

If 50% or more of the time spent on the activity occurs during school hours, it is deemed to take place during school hours. Time spent on travel counts in this calculation if the travel itself occurs during school hours. Therefore, if more than 50% of the visit occurs outside of school hours, for example weekend visits, then parents would be expected to pay the full amount.

15. Data Protection

It is vital for the health and safety of those involved in visits that relevant information is available to leaders and external providers for planning activities, and in the event of an emergency. Personal information will be carefully managed and shared with identified individuals only where it is relevant to the safety of the participants. Any information that is retained will be stored in line with the school's Data Protection Policy, which can be found on the school's website.