

# Birkdale High School



## Educational Visits Policy



Birkdale High School  
Policy for the Management of Offsite Visits and  
Learning Outside the Classroom (LOtC)

*Date of Policy:* January 2015  
*Members of staff responsible:* Educational Visits Co-ordinator (Mr P Marshall)  
*Review date:* September 2015

Overall responsibility for health and safety for off site visits:	Gil Bourgade Headteacher
Operational responsibility for compliance with this policy is delegated to:	Paul Marshall Educational Visits Co-ordinator

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# Provision of Employer Guidance

Birkdale High School acknowledges the immense value of off-site visits and related activities to young people, and fully supports and encourages those that are well planned and managed.

It is a legal expectation that employees must work within the requirements of their employer's guidance; therefore employees who work with children on offsite visits and related activities must follow this policy most of which is a reflection of Outdoor Education Advisers' Panel (OEAP) Employer Guidance (EG).

This policy provides managers and staff with a clear picture on how to fulfil their health and safety duties. This policy supports and reinforces a common sense and proportionate approach to health and safety and assessment of risk in line with the Government's drive to discourage wasteful bureaucracy. Nevertheless documentary evidence is still needed to support the fact where appropriate advance attention is given to the risks of an activity.

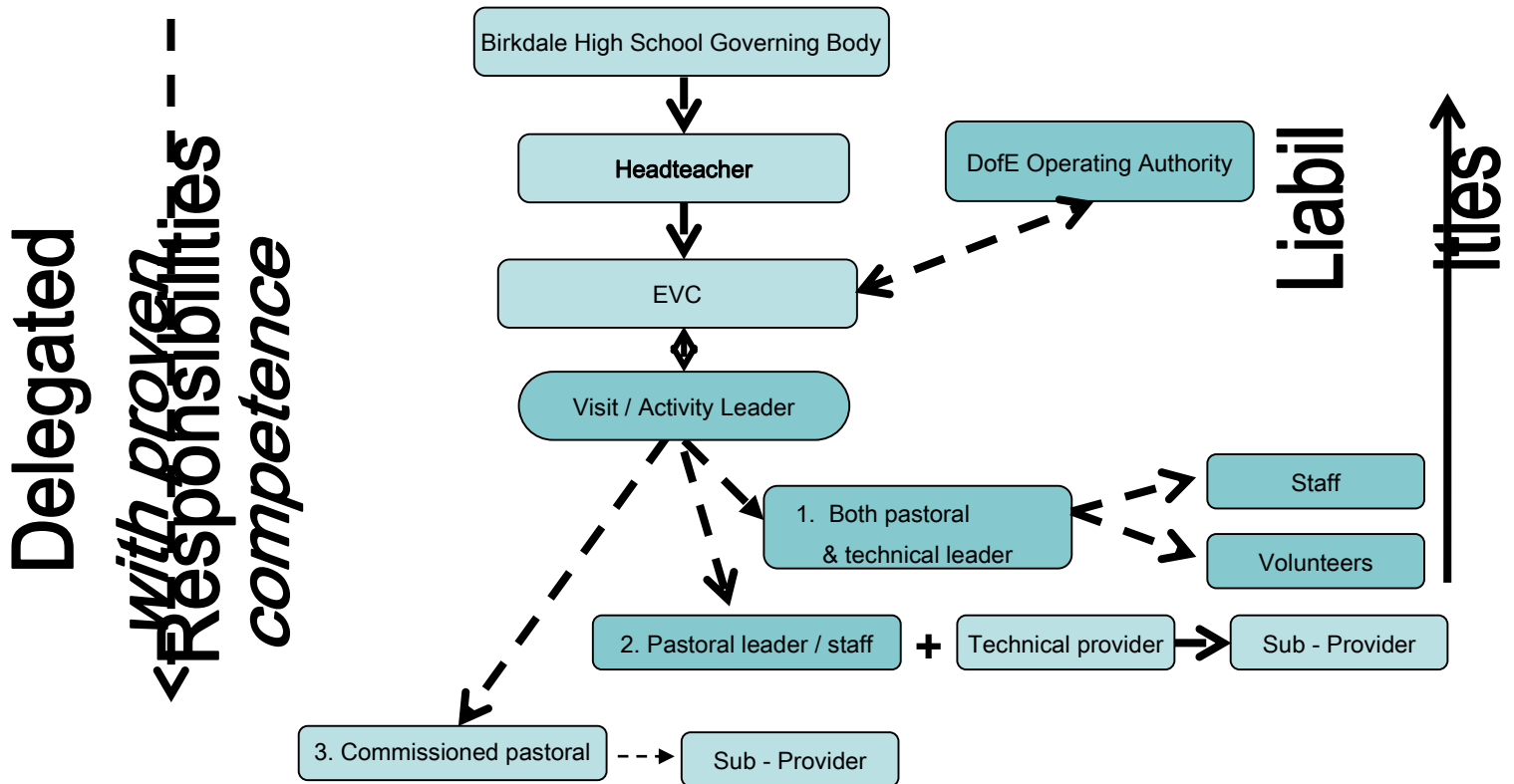
We adopt the guidance of Sefton Local authority and use the Evolve system to submit each school visit to the checking system.

Staff are required to submit requests for trips as soon as possible. Wherever possible they should submit the trip request through the Evolve system half a term in advance and, in the case of adventurous or overnight trips plans should be submitted at least one term in advance.

When a School employee commissions LOtC activity, they must ensure that such commissioned agent has either:

1. adopted our (Sefton) Guidance or OEAP EG **or**
2. has systems and procedures in place where the standards are not less than those required by OEAP EG.

The flow chart below illustrates the lines of responsibility and liability.



## Scope and Remit

The OEAP EG clarifies the range of employees whose work requires them to use the guidance (1.1c). In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base;

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP EG document Underpinning Legal Framework

## Ensuring Understanding of Basic Requirements

As an employer, Birkdale High School is required to ensure that its employees are provided with:

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

Birkdale High School uses a web-based system, EVOLVE, to facilitate the efficient planning, management, approval, monitoring 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). As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including search and report facilities, downloadable resources and information, staff records and visit history.

EVOLVE: [www.seftonvisits.org.uk](http://www.seftonvisits.org.uk)

One senior member of staff is nominated as the Educational Visits Coordinator (EVC). They should attend an EVC OEAP accredited training course and will then act as EVC and support the Headteacher in ensuring all trips adhere to our policy.

The EVC should be specifically competent, ideally with practical experience in leading and managing a range of visits similar to those typically run by the establishment.

The EVC should ensure that a policy is in place for educational and off-site visits, and that this is updated as necessary and readily available to staff as well as uploaded on to EVOLVE.

The Headteacher must ensure that the EVC undertakes a formal revalidation approximately every 3 years.

Refer to OEAP document Responsibilities Headteacher

Refer to OEAP document Responsibilities EVC

### *Adventurous Activities*

If any employee of Birkdale High School is leading an adventurous activity, as defined in the Adventure Activities Licensing Regulations 1996 (climbing, caving, remote trekking, waterborne activities), and other activities that present hazards significantly over and above those in everyday life, the EVC must ensure that the group leader and other supervisors are suitably competent to lead or instruct the children or young people in the activity. Competences should be demonstrated by holding the relevant National Governing Body (NGB) award where it exists. Where there are queries regarding the competencies/experience required, the Sefton Offsite Visits Adviser or relevant NGB should be contacted for advice.

### *Other Areas*

Staff competence in areas such as first aid, minibus driving and lifesaving must also be considered when planning activities.

Volunteers will require induction training prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process.

Where an employee requires further guidance they should contact the nominated adviser.

The nominated adviser in Sefton is:

Moira Greenwood

Health Unit

Telephone: 0151 934 3438/ 07855782055

E-mail [moira.greenwood@sefton.gov.uk](mailto:moira.greenwood@sefton.gov.uk)

## **Approval and Notification of Activities and Visits**

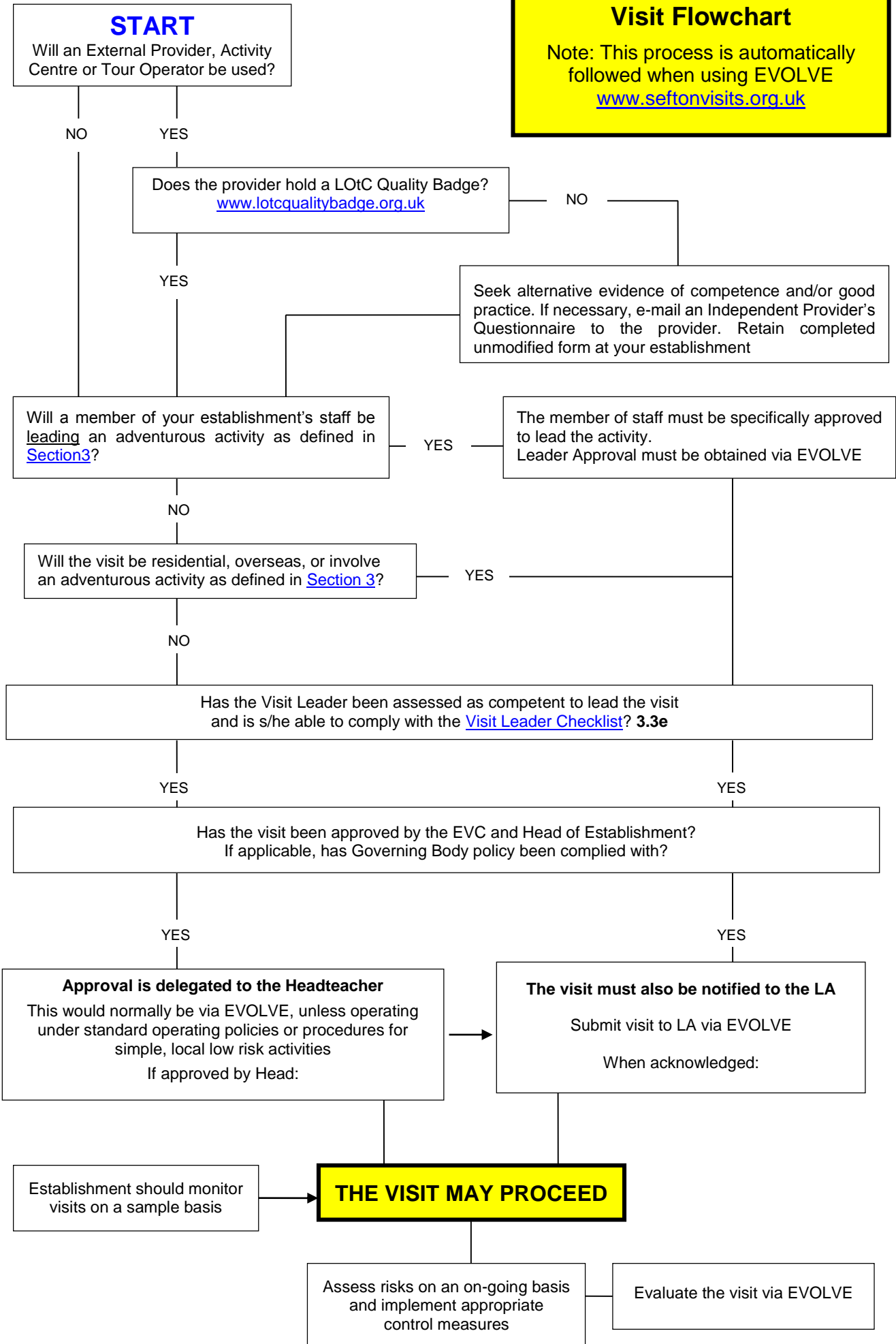
Governing Body and LA approval is required for visits and activities fulfilling any of the criteria below:

- Visit/activity involves the provision of an adventurous activity to be led by a member of establishment staff
- Visit/activity involves field work to be led by a member of establishment staff in an area of open country
- Visit/activity involves a journey abroad or a significant sea crossing (this includes visits to the Isle of Man, Northern Ireland, the Orkneys and the Shetland Islands)

Birkdale uses an on-line system for notification and approval called EVOLVE. A key feature of this system is that visits and LOTC activities requiring LA approval are automatically brought to the attention of the School. Those visits and activities not requiring approval may be viewed sampled or monitored using the database and diary facilities of the system.

## Visit Flowchart

Note: This process is automatically followed when using EVOLVE  
[www.seftonvisits.org.uk](http://www.seftonvisits.org.uk)



## Risk Management

As an employer, Birkdale High School has a legal duty to ensure that risks are managed - and reduced to an “acceptable” or “tolerable” level. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring the School to provide such support, training and resources to its employees as is necessary to implement this policy.

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

There is no legal or School requirement to produce a risk management in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. However, the School ensures that there is an electronic portfolio of exemplar generic risk-benefit assessments via EVOLVE.

It is strongly recommended that leaders adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage them from making full use of LOtC learning opportunities.

Refer to OEAP document: Risk Management

## Emergency Planning and Critical Incident Support

Staff involved in a visit must be aware of and adhere to the policy on emergency procedures and reporting accidents/incidents including reporting immediately to the EVC and using the Evolve incident form to report. [Certain incidents are also reportable to HSE under RIDDOR \(Reporting of Injuries Diseases and Dangerous Occurrences Regulations\)](#)

[For further information on reporting pupil accidents](#)

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

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

In a major emergency, the following telephone numbers should be used by staff:

Birkdale High School: 01704 577 253

Paul Marshall EVC: 07949028223 or home 01704 889112

Sefton council 24 hour Emergency Contact: **0151 922 6107**

This number should be carried by leaders at all times during residential/out of hours off-site activities but should only be used in the case of a genuine emergency. *Under no circumstances should these numbers be given to young people or to their parents or guardians.*

Refer to OEAP document Critical Incident Management for Visits

## Monitoring

As an employer, Birkdale High School ensures that there is sample monitoring of the visits and LOtC activities undertaken. All visits must have a clear benefit and purpose that is for the wellbeing of its pupils. Such monitoring should be in keeping with the recommendations of OEAP Employer Guidance.

Refer to OEAP document Monitoring

See also Evaluation of LOtC



## Assessment of Leader Competence

Those organising, leading or supervising visits or activities must be competent to do so. The manager or EVC must assess competence, taking account of their staff's ability to lead, manage and control the children or young people partaking in the visit. Competence on specific activities may also be necessary, as well as knowledge of the venue being visited.

OEAP EG sets a clear standard to which Sefton leaders must work. The guidance states:

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

- *Knowledge and understanding of their employer's guidance supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.*
- *Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.*
- *Knowledge and understanding of the group, the staff, the activity and the venue.*
- *Appropriate experience*
- *In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.”*

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

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

OEAP Visit Leader Training is strongly recommended for all employees who lead LOtC activities. Currently there is no revalidation requirement however, to meet LOtC guidance requirements regarding leader competence; leaders must be current in their knowledge of expectations of good practice, so update refresher training is also strongly recommended.

Refer to OEAP document Assessment of Competence

See also Good Practice Basics, Risk Management, Planning Basics, and Rigorous Evaluation

## Charges for Off-site Activities and Visits

The Headteacher, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to OEAP document Charges for Off-site Activity and Visits in an Educational Establishment

## Vetting and DBS Checks

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

For the purposes of this guidance:

- *frequently* is defined as "once a week or more";
- *intensively* is defined as 3 times in a 30 day period or overnight (2am - 6am).

However, it must be clearly understood that a DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

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

For trainee teachers on placement, the School will only accept DBSs obtained through the university or college for where the organisation has signed up to say that they will share our criteria to operate to certain minimum standards. (The practice of using a DBS obtained through another organisation is known as portability. Currently the DBS do not endorse this practice.)

Refer to OEAP document: Vetting and DBS Checks

## **Requirement to Ensure Effective Supervision**

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

The School will ensure there is an appropriate level of supervision at all times for all visits and that such supervision is effective. This must have been approved by the EVC and Headteacher and, where applicable, in accordance with Governing Body policy.

Effective supervision should be determined by proper consideration of:

- age (including the developmental age) of the group;
- gender issues;
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions,
- staff competence.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

Refer to OEAP document Ratios and Effective Supervision

Refer to OEAP document Group management and Supervision

## **Preliminary Visits and Provider Assurances**

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information is a vital dimension of risk management.

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

Examples of such schemes include:

- The LOtC Quality Badge
- AALS licensing
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

Where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

If the provider does not hold a recognised accreditation, the establishment must ask the provider to complete and return an Independent Provider’s Questionnaire.

Refer to: OEAP document Preliminary Visits and provider Assurances

## **Insurance for Off-site Activities and Visits**

Employer's Liability Insurance is a statutory requirement and the School holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it.

Some level of Personal Accident Insurance is provided for all employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit / Activity Leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

Visit and Activity leaders should contact the EVC to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Refer to OEAP document 4.4c Insurance

## **Inclusion and the Equality Act 2010**

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

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

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

The Governing Body, the Headteacher, Curriculum Planners, EVC and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Equality Act 2010, it would be discriminatory to:

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

Staff must be aware of appropriate language and behaviour towards children and young people from diverse backgrounds.

Refer to OEAP document Inclusion as a Legal Issue

See also documents SEN and additional needs, Inclusion and DDA

## **Adventure Activities Licensing Regulations**

The Governing Body, the Headteacher, EVC and Visit Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Adventure Activities Licensing Authority (AALA) are the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

Government have agreed to abolish the License scheme and HSE are proposing to replace it with a code of practice. HSE assumes that there will be no change in standards of safety in this sector because the requirements of the current licensing regime are based on those in the Health and Safety at Work etc Act 1974 and the associated H&S management regulations.

Leaders should be aware that the AALS license is only an assurance of safety and it does not accredit educational or activity quality.

Refer to OEAP document Summary of Adventurous Activity Licensing Regulations

# Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and establishments **must** follow the specialist guidance provided in Sefton's transport policy. All national and local regulatory requirements **must** be followed.

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

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

Refer to OEAP document Transport: General Considerations

Refer to OEAP document Transport in Minibuses

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures. HCC Form OV7D is available for this purpose.

Refer to OEAP document Transport in Private Cars

## **Glossary**

The following is a list of some of the commonly used terms:

<b>Activity</b>	Any specific element of the planned programme for a visit
<b>Adult</b>	Any adult accompanying a visit in a supervisory capacity except teachers employed at the school and employees of third party contractors. Adults selected must be well known to the school and/or pupil group
<b>EVC</b>	An Educational Visits Coordinator - the member of the school staff identified by the Headteacher to ensure that all visits are planned in accordance with LEA and school policies
<b>Group</b>	All those on the visit (principally pupils, teachers and adults)
<b>Group leader</b>	A teacher approved by the Headteacher to plan and have overriding responsibility for the safety of the group, the activities and the procedures involved in the visit
<b>Instructor</b>	A person with technical skills and qualifications contracted to instruct adventurous activities
<b>Parent</b>	Includes a person who is not a parent of the pupil but has parental responsibility for him/her or who has care of the pupil
<b>Risk Assessment</b>	A formal process of assessing the potential of an activity, procedure or location to cause harm to an identified person or group
<b>Risk Management</b>	The identification of a procedure or course of action to minimise a potential risk to an acceptable level
<b>School Contact</b>	A member of the Senior Management Team of the school who will be available in the locality of the school to assist with any emergencies and who will hold all the emergency contact information during the duration of the visit
<b>Teacher</b>	A teacher employed by Birkdale High School
<b>Visit</b>	Any venture taking place outside the physical bounds of the school, and including the entire period between departing and returning to that establishment

## **The Role of the Governing Body**

This section summarises the key points of the role of governing bodies. This gives a clear outline of the scope and extent of their role in supporting the Headteacher and school staff in the safe management of educational visits.

To fulfil its responsibilities for the health and safety of pupils on educational visits the Governing Body shall

- formally adopt the Policy and Guidance on Educational Visits
- determine and keep under review the school's policy on educational visits which will detail the scope and range of visits normally conducted by the school and the internal procedures by which visits are proposed and approved
- ensure that the school's policy enables, whenever reasonable and appropriate, the inclusion of pupils with disabilities, special educational or medical needs
- nominate a governing body committee to oversee the procedures and give approval as required by the school's policy on behalf of the whole governing body (governors involved should not be staff governors)
- take advantage of LEA and other training and advice in order to be in a position to ask informed and reasonable questions
- establish that each visit has clear educational objectives appropriate for the age, needs and experience of the target group
- ensure that the school's policy establishes clearly the level of risk assessment information required to be seen for different types of visits in order for governing body approval to be given
- ensure that monitoring procedures are in place to evaluate the effectiveness of policies and procedures including feedback following visits and to ensure that the school receives value for money
- ensure that it is clear about its role in the event of an emergency

## **The Role of Sefton through Evolve**

Sefton will designate an Outdoor Education Adviser and other key people who can support and advise schools in their planning (Moir Greenwood).

To undertake its responsibilities for the health and safety of pupils and employees on educational visits the LEA has

- defined three types of educational visit – local, distant and residential - that may additionally be defined through being overseas and/or involving adventurous activities
- a clear system of delegating tasks for approving the planning and risk management of these different types of visits
- a procedure to ensure that notification of approval takes place at an appropriate stage in the planning cycle
- a training programme for school staff and governors in the management of educational visits
- a system of maintaining and monitoring training records and extra qualifications held by school staff
- arrangements to assess the competence of Educational Visits Coordinators and group leaders and will ensure training is available for those who need that competence
- guidance on the standards expected of contractors used by schools which will be updated by school evaluation forms - to provide a satisfactory source of information for schools to use
- emergency procedures in place, including 24 hour access, to support schools in cases of extreme difficulty or grave emergency

## The Role of the Headteacher

Responsibility within the school for the approval of visits remains with the Headteacher and governors, but, with the approval of the governing body, the Headteacher may delegate certain of these tasks to the Educational Visits Coordinator (EVC), who will normally be a senior member of staff.

The Headteacher must:

- be aware of relevant regulations and guidelines including Health and Safety responsibilities, this Educational Visits Policy and Guidance, the DfES HASPEV Guidance and its supplements, school policies and related documents. These must be available and accessible to anyone involved in educational visits
- ensure that the educational objectives for visits are clearly defined and commensurate with the age, maturity and capability of the pupils [*The objectives will be inclusive, stated in the pre-visit documentation, and made known to all relevant parties, including the governing body, Headteacher, teachers and accompanying adults, parents, and pupils*]
- ensure that the governing body has considered and supports the nature and objectives of any planned educational visits and is provided with appropriate levels of information sufficiently in advance to enable governors to fulfil their responsibilities
- be satisfied that all aspects of any visits, including the granting of approval, will be dealt with in accordance with this policy and guidance and the school's own policy and procedures
- ensure that an assessment of the safety management systems of external providers has been undertaken prior to booking, e.g. AALA licences
- ensure risk assessments are reviewed periodically and changes are made in the operating procedures and/or control measures where identified
- actively involve pupils in the risk assessment process, to a level appropriate to their understanding, including the planning, organisation and conduct of visits. [*They should be given responsibility consistent with their age, maturity and capability*]
- ensure that visits are evaluated to inform the planning and operation of future visits
- be satisfied of the competence of group leaders to lead, manage and control pupils in the proposed setting [*Consideration will be given to the following -experience, qualification, organisational skills, personal qualities, fitness, medical condition, knowledge of the group and environment, prior experience of leading or assisting in leading the activity*]
- ensure all staff are aware of their continuous pastoral care responsibilities (even when using a technical leader with their group) and are familiar with the school's child protection policy
- be satisfied that the arrangements for supervision are appropriate, agreed and known by all concerned. [*Staff involved will be required to have a clear understanding of the different strategies required for direct supervision and when the circumstances are right, for indirect or more remote supervision*]
- be satisfied that staff roles and responsibilities (including those of accompanying adults) are commensurate with their experience and competence to undertake them
- secure the allocation of sufficient resources to meet identified training needs, including courses run by the LEA, for staff and governors
- record accidents and incidents where appropriate, and report them to the governing body, or LEA, where required. A clear reporting system for accidents and incidents should be in place and staff must be made aware of the procedures
- ensure all involved in visits are made aware of and understand the LEA's emergency procedures
- ensure the school has emergency procedures in place in case of a major incident on a school visit
- ensure that the school adopts a clear and effective system for recording risk assessments which is understood by those involved in visits.
- be aware of the contractual arrangements to be put in place with third party providers and the central role of the school in making external contracts. [*Appropriate consideration must be given to best value, financial management, choice of contractors, and contractual relationships*]
- ensure that written contracts are made with the school and any school travel agent/tour operator on behalf of the pupils involved in the visit
- ensure that all finances for the visit are controlled through the schools financial systems so that should any contract fail the school is able to withhold further payments



## **The Role of the Educational Visits Co-ordinator**

Each school should nominate a member of staff as the **Educational Visits Coordinator (EVC)**. This person must

- have experience in leading and managing a range of educational visits similar to those typically run by the school
- have sufficient credibility to be able to influence colleagues
- be able to support colleagues in the formulation of Risk Assessments and the development of Risk Management procedures

The EVC will be involved in the planning and management of educational visits led by school staff. They will support visit leaders, the head teacher and school governors by ensuring that the LEA and school's policies and guidance are followed.

In particular the EVC will:

- produce an annual record of educational visits for the Governing Body including a report of accidents and 'near misses'.
- work with group leaders to ensure that the objectives of the educational visit are achievable
- support the Headteacher and governors in their decision-making
- be the principal contact with the LEA over visits planned by the school
- be able to confirm that the leadership of the visit is appropriate and to check staff qualifications and experience including accompanying teachers and adults
- confirm that consideration has been given to the group concerned and the location (group/site risk assessment)
- organise the induction and training of group leaders, teachers and other adults taking pupils on educational visits
- ensure that emergency procedures are in place for each visit and that group leaders and school contacts know how to liaise with the LEA should an emergency occur
- establish suitable record keeping practices for use during educational visits e.g. medical matters, accidents and other significant management decisions
- ensure that the school has a code of conduct applied consistently to all educational visits
- monitor and review the school's programme of educational visits, establishing a clear picture of current practice and reporting on successes and targets for improvement
- take the lead for any review of the school's policy for educational visits

## **The Role of the Group Leader**

A Group Leader must be appointed for each planned visit.

Group leaders are responsible for the safe planning and execution of visits and should:

- have the experience, training and qualifications to control the group and lead the team of accompanying teachers and adults
- be conversant with good practice in planned activities including those he/she will not be instructing
- prepare and brief the pupils, their parents and accompanying teachers and adults
- make a comprehensive risk assessment and management plan and present it to the EVC/Headteacher
- have regard for the health and safety of the group (teachers/adults and pupils) at all times
- determine the level of first aid that may be required and to nominate a teacher or other adult to have that responsibility assess the initial and on-going suitability of the group in relation to the planned activities
- ensure that the visit operates in accordance with the school and LEA policies and guidance

## **The Role of Other Teachers and Accompanying Adults**

Teachers and adults accompanying any visit should be clear about their roles and responsibilities. All must do their best to ensure the health and safety of everyone in the group and follow the instructions of the Group leader. Adults should be guided in their role by teachers and must not be left in sole charge of pupils except where it has been previously agreed as part of the risk assessment. Only adults known to teachers should be given pastoral responsibilities. Instructors or other staff working for contracted organisations can support teachers and adults in their pastoral duties but cannot assume a full pastoral role.

All adults accompanying a party must be made aware, by the party leader, of the emergency procedures which apply. Each adult should be provided with an emergency telephone number. This will normally be the school number, but where an activity extends beyond the normal school day the telephone number of a designated emergency contact must be provided. This procedure must also include trips by sports teams.

It is not permitted for supervising Staff to participate in any contact or striking sports with pupils during the trip (such as football, basketball, volleyball, cricket or softball). This is because the school is cognisant of the potential for injury to pupils through 'mis-matching' of adults and pupils in terms of physical development. Group Leaders should ensure that any centre staff also adhere to this rule. Caution should be exercised if pupils from different year groups engage in sport during the trip to ensure that the game is not seen as seriously competitive by pupils and that there is not a consequent danger from Relative Age Effects or from the different physical maturity of participants.

Staff must never drink alcohol in the cases of one-day activities such as visits and educational trips. Whenever staff are responsible for pupils on residential trips, it is *recommended* that they should not drink alcohol. The following rule applies: where there are several members of staff responsible for a group of pupils, it must always be the case that at least two staff abstain totally from drinking alcohol in any one 24 hour period. [This can be done on a rota basis over the course of a week. In every case, either the designated Leader of the party or the designated Deputy Leader must refrain from drinking during any 24 hour period]. The other staff may drink 'in moderation'. To help guide staff in defining the word 'moderation', the maximum that should be drunk in any one day should be 3 units of alcohol.

### **The role of the parent**

Parents must ensure that all relevant information about their child(ren) is given to the school before, during and after the trip.

- All contact details must be up to date
- All relevant medical issues are discussed with the group leader before the trip.
- Turn up for meetings related to the trip where appropriate
- Talk through the impact of positive behaviour with their son before going on the trip
- Read through all documentation before the trip and ask the trip leader relevant questions

### **The role of the pupil**

In order that all pupils gain the most out of each trip, all pupils must

- Show absolute respect for staff and must completely follow all of their instructions
- Return promptly to the identified place
- Wear correct uniform or clothing for activities
- When on a residential respect all adults (centre staff, staff from other schools and members of the public)
- Adhere to all rules given by the venue in full
- Enjoy themselves and encourage all other pupils to take part in full.

## **Types of Visit**

For the purpose of this policy the following types of visit are defined:

### **LOCAL**

Examples of the range of local visits include such things as a traffic census outside the school gate, taking a school team to an away fixture, special school life-skills excursions, local project work, visit to local parish church service, weekly swimming lessons. Schools should state in their school policy, the range of visits that they undertake that they would define as local. The policy should also make clear the processes by which parents will be informed that their children are engaging in these activities, and in some cases that these activities have been cancelled or re-scheduled (e.g. team fixtures and practices).

### **DISTANT (within the UK)**

These visits would always require some form of transport, but would not require an overnight stay. The test of 'distant' is the added difficulty an emergency would present over and above that on a local visit.

Examples might be

- where a pupil is hospitalised on a local visit, the parent could be informed and arrive quickly, allowing the teacher to resume supervisory duties, but on a distant visit, the teacher may well be required to stay for an extended time with the pupil, requiring significant changes to plans
- where there is a breakdown with transport, parents cannot easily be called upon to assist in collecting their children
- where the distance means that the length of the day is extended, and using a minibus may require two drivers

Parents must always be informed by letter of a Distant visit.

### **RESIDENTIAL**

These visits involve at least one overnight stay requiring supervisors to have 24 hours a day supervision responsibilities. These will always require LEA approval.

Visits can be further categorised by being overseas or involving adventurous activities:

### **OVERSEAS**

Overseas visits involve travel outside the United Kingdom.

## VISITS INVOLVING ADVENTUROUS ACTIVITIES (INCLUDING STUDY VISITS)

### Activities regarded as ‘adventurous’ and requiring LA approval include:

- All activities in ‘open country’. See section on [Walking – Adventurous or non-adventurous?](#)
- Swimming (all forms, excluding publicly lifeguarded pools)
- Camping
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration
- Shooting and archery
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- Off road cycling
- Other activities (e.g. initiative exercises) involving skills inherent in any of the above

The responsibility for the safety of participants in an adventurous activity will rest with either:

- a) **An external provider** - see the section on [Choosing an External Provider/ Tour Operator](#)  
**or**
- b) **A member of your establishment’s staff** - see the section on [Approval of establishment staff to lead Adventurous Activities](#). This person must be specifically approved by the LA to lead the activity, via EVOLVE.

The list above is not definitive or exhaustive. Advice should be sought from the LEA if there is uncertainty over whether a particular activity should be considered ‘adventurous’ for the purpose of approval.

## **Levels of Supervision**

The selection of teachers and adults to accompany an educational visit is one of the most important factors that secures safety. Applying a simple formula to determine staff numbers must not be a substitute for proper risk assessment. Risk assessments would have to justify why only the minimum ratios should apply. When approving visits Headteachers and governors must consider the age, gender, experience and maturity of the pupils involved and the nature of the planned activities, in particular the extent of any adventurous activities, to decide the level of supervision required.

### **Distant, Residential and Overseas Visits**

The staffing ratios set out in the tables below for distant, residential and overseas visits are **minimum** numbers and subject to risk assessment.

### **Local Visits**

Headteachers are responsible for deciding the appropriate staffing and ratios for local visits. The process of making judgements about the appropriateness of staffing for a local visit must take into account the age, maturity and number of the group and the experience and knowledge of the adults.

Some activities such as local visits will be supervised by non-teaching staff and other adults. It is essential to remember that teachers, other school staff and any adult working under the direction of the Headteacher have a 'duty of care' for the pupils in their charge. The higher duty of care is held by teachers, by virtue of holding Qualified Teacher Status (QTS), and as such they will always hold the ultimate responsibility for tasks delegated to other adults.

### **Adventurous Activities**

A list of activities deemed to be adventurous is included, please refer to. Most of these activities will require a higher supervision ratio.

If a school is using a commercial provider, it is the responsibility of the school to carry out a risk assessment on the qualifications of any staff employed by the provider who will be involved with the visit. It must be stressed that staff employed by any commercial provider must not be taken into account in calculating the school's staffing ratio.

When using a commercial provider the group leader must pay heed to the smaller group sizes required for some of the planned activities. The staffing and planning by the school must take into account how the school staff will be able to support the supervision of pupils in the smaller groups.

### **Exploratory Visits**

Exploratory visits form an important part of the planning of educational visits. They ensure that there is good prior knowledge of the places to be visited and that site-specific risk assessments are appropriately completed. Exploratory visits must be sanctioned and approved by the Headteacher and governing body in advance.

## Contacts

<b>EVOLVE</b>	<a href="http://www.seftonvisits.org.uk">www.seftonvisits.org.uk</a>
<b>Sefton Offsite Visits Adviser/Health &amp; Safety Coordinator</b>	Moira Greenwood 0151 934 3438/3650 Moira.greenwood@sefton.gov.uk
<b>Educational Visits Co-ordinator</b>	Paul Marshall 01704 889112 / 07949028223 <a href="mailto:pmarshall1@birksdalehigh.co.uk">pmarshall1@birksdalehigh.co.uk</a>

**National Library**

[www.national-library.info](http://www.national-library.info)

**LOtC**

[www.lotc.org.uk](http://www.lotc.org.uk)

**LOtC Quality Badge**

[www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**Outdoor Education  
Advisers' Panel**

[www.oeapeg.info](http://www.oeapeg.info)

### Related Documents

- HSE's [School trips and outdoor learning activities – Tackling the health and safety myths \(06/11\)](#)
- **HSE's FAQs about school trips.** [Overall responsibility for health and safety lies with the employer. Who that is will depend on the category of school](#)
- [DoE Advice on Legal Duties and Powers for Local Authorities, Head Teachers, Staff and governing Bodies \(4/7/11\)](#)