

United Learning

Educational Visits Policy

Scope

This Policy forms part of the health and safety arrangements detailed in Part 3 of the 'United Learning Group Health and Safety Management Policy'. It outlines the arrangements in place to achieve compliance with the duties contained within the Health and Safety at Work etc Act 1974.

It is applicable primarily to schools, but some principles will apply to central office events and will require elements of this Policy to be read in conjunction with the Event Safety Policy.

Implementation

The requirements of this Policy must be implemented within 12 weeks of the date of publication.

Interpretation

The following definitions apply to this policy:

- OEAP – Outdoor Education Advisors Panel – the national body of educational visits advisors and who produce the National Guidance for Educational Visits, of which United Learning is a member.
- OEAP NG – the National Guidance for educational visits produced by OEAP.
- LOtC – Learning Outside the Classroom
- LOtC Quality Badge – a national award operated by the Council for LOtC that recognises activity/event providers or venues that meet educational provision and safety requirements.
- EVC – Educational Visits Coordinator

Educational Visits

This Policy uses the OEAP definition for educational visits as being,

Any occasion when a young person takes part in a structured and employee-led learning activity which is carried out beyond the boundary of the normal operational base, but excepting the following:

- *Where establishments operate on a split site*
- *Work experience placements*
- *Physical Education: only the journey to and from the venue is covered by national guidance. The activity supervision should be that required or recommended by specialist PE guidance, such as that provided by the employer and Association for Physical Education (AfPE).*

The principles outlined in this Policy and OEAP NG must be followed for all activities that meet the above definition.

The Status of OEAP National Guidance

OEAP National Guidance has been formally adopted by United Learning as the management system and guidance to be used by all schools in the management, delivery, and review of all educational visits.



National Guidance starts from three basic tenets:

1. Well planned and facilitated opportunities to learn in the real world, away from the classroom, and to experience adventure, help to improve the lives of young people.
2. Delivering learning outside or off-site does not need to be more difficult than delivering it inside a classroom. Planning and management should, therefore, be practical, proportionate and non-bureaucratic.
3. The key to effective and successful outdoor learning and off-site visits is: The right leaders doing the right activities with the right young people in the right places at the right times.

OEAP NG is comprehensive and extensive; there is no benefit to be derived from repeating its content in this Policy. It is expected that Head Teachers, Educational Visits Coordinators, Visit Leaders and other relevant school staff will familiarise themselves with OEAP NG content and keep themselves apprised of any developments relevant to their area of responsibility.

OEAP NG provides information on a broad range of topics relating to educational visits, however, this Policy only highlights those key elements that relate to health and safety management. For example, there is also detailed guidance on making the case for educational visits, inclusion, and visit charging systems.

Role of the Educational Visits Coordinator

An Educational Visits Coordinator (EVC) is a member of school staff appointed to coordinate all Educational Visits and with the status to effect change and be the focus of good practice. EVCs are required to have experience of managing leading and trips. Whilst support staff may not have routinely taken part in visits, it is possible for a member of support staff to take on the EVC role provided that a clear development programme for their competencies has been developed, implemented and can be evidenced.

An EVC's key functions are to:

- Be a champion for all aspects of educational visits and outdoor learning
- Challenge colleagues across all curriculum areas to use educational visits and outdoor learning effectively in order to provide a wide range of outcomes for children and young people and contribute towards school/establishment effectiveness
- Support/oversee planning so that well considered and prepared arrangements can lead to well-managed, engaging, relevant, enjoyable and memorable educational visits/outdoor learning
- Mentor leaders and aspirant leaders, supporting their ongoing development and training and sample monitor their activity to identify any further training needs
- Ensure that planning complies with this Policy and OEAP NG and that the arrangements are ready for approval within agreed timescales
- Support the school's Head and/or Governors in approval decisions so that all those with responsibility have the competency to fulfil their roles.
- Ensure that every activity is evaluated against its aims for learning and development, that good practice is shared and any issues are followed up
- Keep the school's Senior Leadership Team and Governors informed about the visits taking place and their contribution to school effectiveness

EVCs must have completed an OEAP EVC training course and have this refreshed every three years. Course locations and dates can be searched for [here](#).



Role of the Visit Leader

The Visit Leader has overall responsibility for the learning, development and supervision of the participants and the safety of all, including the rest of the leadership team.

A Visit Leader's key functions are to:

- Be competent to carry out the lead role for the specific activity
- Be able to use the chosen environment or venue(s) to provide a wide range of learning or development outcomes
- Liaise with the school's Educational Visits Co-ordinator (EVC) to ensure that visits have clear aims and are planned to appropriately balance benefits and risks
- Ensure that there is effective supervision
- Take the lead on risk management
- Define the roles and responsibilities of other leaders (and participants) to ensure effective supervision, appointing a deputy wherever possible
- Ensure that child protection issues are addressed
- Provide relevant information to other leaders including the aims and how they can contribute to achieving these, the location, the participants (age, health information, capabilities, special needs, safeguarding and behavioural issues)
- Ensure that informed parental consent has been obtained as necessary
- Provide relevant information to parents and participants, and arrange pre-visit information meetings where appropriate
- Make sure there is access to first aid at an appropriate level
- Ensure that if the visit leadership team includes someone with a close relationship to a member of the group, this is managed to avoid any possible compromise of effective supervision
- Ensure that all leaders and any third party providers have access to emergency contact and emergency procedure details
- Evaluate all aspects, both during and after the event.
- Report any accidents, incidents or near misses.

Visit Leaders must have completed an OEAP Visit Leader course. There is no requirement for this to be periodically refreshed provided that the Visit Leader has been actively involved in educational visits. Course locations and dates can be searched for [here](#).

Educational Visits Management Plan

All schools are required to develop an establishment visit policy that covers all topic areas in the [OEAP NG](#) guidance document 5.3b '*Writing an Establishment Visit Policy*' and includes references to the requirements of this Policy. It is in this document that school should seek to define their Category 1 visits and the generic risk assessments and control procedures designed to facilitate such visits (see below for further details).



Visit Planning and Management

Risk management, in the context of outdoor learning and off-site visits, involves a risk-benefit assessment, as opposed to the standard risk assessment process used across health and safety. It 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.

In carrying this out the following 'SAGE variables' must be considered in the planning, management and delivery of visits:

- **Staffing:** who is needed/available? The plan must work within the limits of available numbers, abilities and experience.
- **Activities** to be undertaken: what do you want the group to do and what is possible?
- **Group** characteristics: prior experience, abilities, behaviour and maturity, any specific or medical/dietary needs.
- **Environment:** indoors or out; a public space or restricted access; urban, rural or remote; quiet or crowded; within the establishment grounds, close to the establishment or at a distance; and the ease of communications between the group and base.

Educational Visits can be broadly divided into two categories:

1. Routine visits that involve no more than an everyday level of risk and are covered by establishment procedures and policies. Such visits should require minimal planning or preparation beyond what is needed to make best use of the learning opportunity. In a 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.

Schools are actively encouraged to define their standard visits that could fall under Category 1 above and draw up the necessary generic procedures and risk benefit assessments that allow such visits to be carried out without the need for the rework of visit plans and procedures each time one of these visits is carried out. In doing so, the following would need to be covered:

- Clearly defined geographical boundaries
- Clearly defined activities
- Defined leader competencies/identification of approved leaders
- Induction and training for new staff
- Generic risk management procedures
- Parental information and blanket consent (if consent is needed)
- Transport – (e.g. the establishment minibus, local public transport)



- First aid arrangements
- Communications
- Emergency plan. Standard procedures are also needed to ensure that on the day:
 - There is a sufficiently competent leader/leadership team.
 - There is an emergency base contact at the establishment.
 - The appropriate people know who has gone where, with whom, and when they will be back.
 - Approval, if needed, has been given.
 - The Visit Leaders have appropriate information about the individual needs of participants.
 - Effective communication between the establishment and the leaders is possible.

Visit Approval/Sign Off

United Learning operates a fully delegated visit approval system. That is, the final decision on whether or not an educational visit has been adequately planned and arranged, and that sufficient contingency arrangements are in place, rests with the School's Head Teacher, possibly with the input of the School's LGB, who must be satisfied that this Policy and OEAP NG has been followed.

Where Schools do not feel they possess the necessary competencies to do this locally and that they would benefit from expert oversight of their visit planning and management, they should engage the services of their local Outdoor Education Advisor (OEA), who will be a member of OEAP. A searchable directory of OEAs is available [here](#). There is no OEA centrally employed and all schools are strongly advised to engage the services of an OEA to assist with all of their educational visit needs.

Emergency Planning

All schools must include emergency planning at the planning stage of each visit. OEAP NG contains extensive guidance around emergency planning, including sample checklists for Visit Leaders to be used in the event of an emergency, available [here](#).

In the event of a major incident occurring, the Visit Leader must immediately notify their Head Teacher who will have access to the United Learning emergency contact/escalation procedure (located in the 'Head Teacher' section of United Hub). In the first instance this requires that Head Teachers notify their Education Director who will cascade information to all relevant parties.

Debrief Meeting

All educational visits should be subject to a debrief/post-visit review, the level of detail for which will vary depending on the complexity of the visit. Key questions that need to be answered for all visits are:

- What worked well?
- What didn't work so well?
- What lessons can be learned/what could we do differently going forward?

For the most basic of visits, this could be covered by an email from the Visit Leader to the EVC. For overseas residential trips, there might be the need for a formal meeting involving a wide range of employees involved in the visit – it's essential that the planning and organisation stage is included in this process as this is where issues often arise e.g. visit paperwork being submitted to the EVC less than a week before the trip is due to commence.



Monitoring

As with any other element of health and safety management, Educational Visits should be including in the periodic local monitoring activities carried out as part of each schools proactive monitoring plan. Schools should evaluate their adherence to this Policy and OEAP NG, as well as the local management arrangements developed.

Insurance Requirements

Schools are covered for all educational visits not exceeding 31 days in duration, however, additional notification to Zurich is required for visits which will include winter sports. Schools should refer to the [Insurance](#) pages of United Hub for further details and contact Zurich for confirmation that they are covered if their visit will include any 'higher risk' activities.

Consent

Schools are not required to obtain consent from parents for pupils to participate in off-site activities that take place during school hours and which are a normal part of a child's education, such as local studies and visits to a museum or library etc. While parents do not have the option to withdraw their child from the school curriculum, it remains good practice to inform parents that a visit or activity is to take place. It is particularly important at the Early Years Foundation Stage so that parents have the opportunity to respond and to be involved.

Schools should be aware that asking for consent when it is not needed can lead to some parents assuming they can withhold consent and so withdraw their child from a curriculum visit when this is not the case.

Consent is needed for all visits organised by establishments other than schools. Consent is needed by schools for visits taking place outside school hours and also for activities spanning both during and outside school hours where it is perceived to involve a higher level of risk, such as a visit involving a long journey or adventure activity.

One-off or blanket consent

The Department for Education (DfE) has prepared a one-off consent form to be signed by the parent on enrolment of their child in a school. This form is intended to cover all types of visits and activities where parental consent is required. The form is available on the [A-Z section](#) of United Hub.

One-off or blanket consent provides evidence that parents have consented in advance to all visits and activities, which require their consent. It is essential that such blanket consent be turned into informed consent prior to any visit. Therefore, where one-off consent is used, parents must be given information about the visit and their child's proposed participation, and given the opportunity to withdraw their consent should they not wish them to participate. Careful consideration should be given to the administrative arrangements. The details of the visit to parents will be a reminder of consent given and could also be an opportunity to update participant information. Activities that involve a charge, or that include payment or cancellation terms, will need agreement by parents to the financial arrangements. Such activities could be treated as visit-specific (see below) if preferred.

Visit Specific Consent

While one-off consent can be used for virtually all visits there are situations where consent for a specific visit may be required. These include some visits abroad and some visits involving third party provision (for example an outdoor education centre) where the provider requires their own consent forms to be signed. In this case information about the visit can be provided to parents and their informed consent given on that basis.



There is no requirement for visit leaders to take evidence of consent on educational visits in the UK. Some overseas visits may require consent forms to be taken as medical professional may require sight of this prior to administering treatment. Schools should enquire if this is the case for the country to be visited and, if unsure, use visit specific consent and take copies of consent forms with them. For visits to some countries it may be necessary for visit leaders to provide evidence of their responsibility for the young people in their party.

Informing Parents

Schools are required to deliver a broad and balanced curriculum to their pupils and it is widely understood that it is not possible to do this effectively without making full use of the local environment and community, within which the school is set. Regular and frequent curriculum visits and activities, off the school site, should therefore be the norm and it would be unreasonable for schools to inform parents of each particular excursion. For these visits, which do not require parental consent, it is good practice to inform parents, perhaps when they enrol their child, or annually through prospectus, policy document or web site, about the way the school uses the local environment and the fact that their child will not always be on the school site but could be learning somewhere in the wider community.

LOtC Quality Badge

If an organisation is displaying the LOtC Quality Badge schools can be assured that their venue has met required standards, therefore visit leaders do not need to carry out their own risk or quality assessments regarding the activities provided. Site familiarisation visits may still be of benefit.

Vetting and Disclosure and Barring Service (DBS) Checks

For extensive guidance on the application of vetting and DBS checks, please refer to [OEAP NG](#) document 3.2g '*Vetting and Disclosure and Barring Service (DBS) Checks*'.

Visits Between United Learning Sites

Sometimes, schools will arrange visits to other United Learning schools. For the avoidance of doubt, the travelling school(s) need to consider the setup, transport and supervision elements of the visit. It is the Host school's responsibility to manage the remaining health and safety considerations on the day. In practice, this should be relatively straightforward where the travelling school(s) activities mirror those carried out routinely by the Host school.

Further Information

Due to OEAP NG being a 'living' document that is regularly updated, it is not hosted on the A-Z section of United Hub. Instead, it can be found at [OEAP.info](#)

Summary of Requirements

- The development of a local Educational Visits Management Plan outlining the process in place for local educational visits management, in line with the requirements of this Policy and OEAP NG.
- EVCs to be OEAP trained, with refresher training provided every three years.
- Visit Leaders to be OEAP trained, with refresher training provided where their knowledge may have lapsed through not having been actively involved in Educational Visits.



UCST – Adherence to this Policy and development of the Educational Visit Management Plan detailed above will satisfy ISI requirements in relation to educational visits and off-site activities.

Local Management Arrangements

At Dunottar School the Educational Visits Management Plan can be located **on the 365 subject share under Teaching and Learning/ Trips**

The following are EVCs

S.Thorne

Ref	Date Produced	Author	Owned By	Details	Consultation Start Date	Approved By	Date Approved	Scheduled Review Date
HSEO-1	1/9/17	Stuart Males	Stuart Males	1 st Version	15/9/17	Group Board	14/12/17	14/12/18

