

## Policy for the Management of Educational Visits

### 1. Provision of Employer Guidance

**Streatham Wells Primary School** has formally adopted “**National Guidance**”. This Educational visits guidance can be found on the following web site: [www.oeapng.info](http://www.oeapng.info) The DfE Guidance for Health and Safety in Schools is here: [DfE advice on Health and Safety](#)

It is a legal expectation that **Streatham Wells Primary School** employees **must** work within the requirements of Lambeth Local Authority guidance.

**Streatham Wells Primary School** employees should also follow National Guidance (NG) recommendations.

Where there is any variance of policy between the national guidance and **Streatham Wells Primary School** policy the **Streatham Wells Primary School** policy requirements take precedence over any guidance.

Where a **Streatham Wells Primary School** employee commissions a **Learning Outside the Classroom** (LOtC) activity, they must ensure that either:

1. adopted **Streatham Wells Primary School** or OEAP National Guidance  
**or**
2. has systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

### 2. Scope and Remit

The NG document “**Basic Essentials MUST Read - Status and Remit**” clarifies the range of employees whose work requires them to use the guidance. 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 Educational visits and Learning Outside the Classroom;
- facilitating experiences for young people undertaking experiences beyond the boundary of the school
- 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.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the NG document: “**Underpinning Legal Framework**”

This Policy relates to the following **Streatham Wells Primary School** policies (Health and Safety Policy, Insurance, Critical Incident).

### 3. Ensuring Understanding of Basic Requirements

As an employer, Lambeth Authority/ Streatham Wells School is required to ensure that its employees are provided with

- appropriate guidance relating to visits and LOtC activity;
- INSET in school a 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 an appointed Adviser that has proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the management of outdoor learning and LOTC at is the Employer Guidance web site [OEAPNG](#)

The relevant training courses for **Streatham Wells Primary School** are:

1. Educational Visit Coordinator (EVC) Training - **Streatham Wells Primary School** is required to have a current, trained EVC in post for the Senior and Junior/Infant schools.
2. **Streatham Wells Primary School** Educational Visit Coordinator (EVC) Revalidation - all **Streatham Wells Primary School** EVCs are required to undertake a formal revalidation from time to time (3-5 years suggested)
3. Visit Leader Training – all visit leaders have training and support from the EVC All new staff have ‘visit leader training’ as part of their induction programme.

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should consult the EVC.

#### 4. Approval and Notification of Activities and Visits

School guidance **must** provide clarity on issues where responsibilities and functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities.

**Streatham Wells Primary School** uses a paper system for notification and approval. When a visit is approved cover, diary, finance, catering, selected member of SLT and in the case of a residential, governor approval is obtained.

##### *Approval*

All visits are approved at Head level. Governor approval is required for all residential visits and all adventure activities. New ventures for the School that do not fit into these categories can be put to Governors at the discretion of the head.

The approval process and procedures for day, adventurous and residential visits are set out in detail on the School Trip Procedures and shared resources (consent forms, emergency cards, trip letters etc.) are available on the shared online resources.

The competence of the visit leader is the key component in ensuring the safety of the participants. Assessment, training and support of visit leaders is a priority of the head.

All School trips have a named leader who must be a serving member of staff at teacher, or in the case of small groups going to a local site, this may be the sports leader or learning mentor at **Streatham Wells Primary School**. The approval paperwork is to be completed by the Trip Leader

#### 5. Risk Management

Refer to NG document: [“Risk Management”](#)

**Streatham Wells Primary School** has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring **Streatham Wells Primary 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. **Streatham Wells Primary School** promotes 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. DfE also make clear that they support this approach through their guidance here [DfE assessing and managing risk](#).

There is no legal requirement to produce a risk assessment 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. HSE case study examples of sensible school trip risk management are available here: [HSE case-studies](#)

Generic **Streatham Wells Primary School** risk management plans exist for a wide range of trips and components of trips – accommodation, transport, theatre trips etc. These are available on the staff shared drive [Risk Management](#)

For a clear justification for the Risk/Benefit approach to risk management see the article by Professor David Ball here: [the-future-of-risk-assessment](#)

## 6. Emergency Planning and Critical Incident Support

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.

**Streatham Wells Primary School** is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

Refer to NG document: [“Critical Incident Management for Visits”](#) and the **Streatham Wells Primary School Critical Incident Policy**. All **Streatham Wells Primary School** trip leaders are provided with a Critical Incident card detailing our emergency procedures and contact details for the **Streatham Wells Primary School leadership Team**.

All residential trips have a nominated base contact who has trip details and is ‘on call’ at all times.

## 7. Monitoring

**Streatham Wells Primary School** ensures that there is monitoring of the visits and LOTC activities undertaken by its staff. There is a clear expectation that the monitoring function is a delegated task put in place by the EVC and principally carried out by staff leading trips.

Refer to NG document: [“Monitoring”](#)

## 8. Assessment of Leader Competence

Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the **Streatham Wells Primary School** Policy that all leaders and assistants have been assessed as competent to undertake such responsibilities as they have been assigned in line with national guidance.

All staff involved in off-site activities complete a ‘Certification of Experience’ form where experienced staff comment on their role in trips.

To be ‘competent’ also includes completing **Streatham Wells Primary School** First Aid qualification.

*Adventurous Activities – see appendix A for list*

**Streatham Wells Primary School** acknowledges the immense educational benefits that outdoor activities can potentially bring to children, and fully supports and encourages activities that are correctly planned, managed, and conducted. All centres and providers used by the school for the provision of adventure activities will hold a current AALS licence and qualified instructors.

#### *Other Areas*

Staff competence in first aid, life saving etc may also be needed, depending on the activity. Volunteers will also require induction training prior to a specific visit. Training requirements should be identified as part of the risk assessment process.

Refer to NG document: ["Assessment of Competence"](#)

### **9. Role-specific Requirements and Recommendations**

**Streatham Wells Primary School** guidance sets out clear and detailed responsibilities and functions of specific roles. These are:

[Governing Body](#)

[Head](#)

[EVC](#)

Refer to individual NG documents headed as above.

**Streatham Wells Primary School** Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found in the establishment. These are:

1. Board of Governors
2. Headteacher
3. EVC
4. Visit or Activity Leader
6. Volunteer Adult Helper (DBS checked)

The following link includes detailed guidance for each role listed above

[oeapng - guidance by role](#)

### **10. Charges for Off-site Activities and Visits**

See **Streatham Wells Primary School Charging Policy**

EGS has the following 'code' for charging for visits:

**11. Vetting and DBS Checks** - see also **Streatham Wells Primary School** [Child Protection Policy](#)

**Streatham Wells Primary School** staff must undergo an enhanced DBS check as part of their recruitment.

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.

Refer to NG document: ["Vetting and DBS Checks"](#)

## 12. 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”.

Effective supervision should be determined by proper consideration of:

- Staff Competence
- Activity - nature and location of the activity (including the type of activity, duration, skill levels involved)
- Group - age (including the developmental age) of the group; ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- Environment - 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,
- Distance away from the base

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

See link here: [“Early Years Foundation Stage”](#)

Refer to NG document: [“Ratios and Effective Supervision”](#)

Refer to NG document: [“Group management and Supervision”](#)

Guidance for **Streatham Wells Primary School** staff contains examples of typical staffing ratios for trips.

## 13. 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 gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. The EVC will advise on this in each specific case. A pre-visit is usually required for visits where there is a high complexity factor and the visit has not happened previously, or when the visit is adventurous and led by **Streatham Wells Primary School** staff.

Residential, adventure activities led by school staff all have aspects of complexity. If the visit is led and managed by a provider, then a variety of approaches can reduce the need to pre visit.

**Streatham Wells Primary School** takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

Refer to: NG document [“Preliminary Visits and provider Assurances”](#)

## 14. Insurance for Off-site Activities and Visits

Employer’s Liability Insurance is a statutory requirement and **Streatham Wells Primary School** have arranged a policy that will respond and, if appropriate, indemnify against all claims for compensation for bodily injury suffered by any person with a contract of employment. This cover also extends to those persons who are acting in an authorised voluntary capacity. **Streatham Wells Primary School** also holds Public Liability insurance, which will indemnify the school against all claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, third party property where **Streatham Wells Primary School** are deemed to have been negligent. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer’s staff if they commit a negligent act. The indemnity includes activities such as off-site activities and outside visits organised by which **Streatham Wells Primary School** may be considered responsible.

The School also holds comprehensive travel insurance for staff and pupils. Refer to NG document: [“Insurance”](#)

## 15. Inclusion

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.

Establishments should 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

Heads, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a Legal issue.

Under the Disability Discrimination Act 1995, it is unlawful 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.

Refer to NG document: [“Inclusion”](#)

## 16. Good practice requirements

To be deemed competent, a **Streatham Wells Primary School** Visit Leader must be able to demonstrate *the ability to operate to the current standards of recognized good practice for that role*.

All staff and helpers must be competent to carry out their defined roles and responsibilities.

Guidance sets a clear standard to which **Streatham Wells Primary School** leaders must work. The guidance states:

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

- Knowledge and understanding of **Streatham Wells Primary School** guidance supported by school-led training.
- Knowledge and understanding of school procedures supported by a structured induction process specified by the establishment.
- Knowledge and understanding of the staff, the activity, the group 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.

Where a Volunteer Helper is a parent (or otherwise in a close relationship to of 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-Benefit assessment.

Refer to NG document: [“Good Practice Basics”](#)

## 17. Medical

Medical details for students and staff taking part in trips are collected by the trip leader either through a specific

medical consent form for residential trips, or by reference to the school database for day visits. The School nurse is also consulted for residential trips where appropriate with parent's consent. Any specific student medical issues are to be included in the trip risk management planning.

First aid training is provided for **Streatham Wells Primary School** trip staff. It is desirable that all staff supervising students on a school trip have knowledge of appropriate first aid.

## 18. 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. All national and local regulatory requirements **must** be followed.

Transporting young people in private cars requires careful consideration. Staff cars should only be used to transport students in 'unplanned' or 'emergency' situations. For example, Journeys to hospital, to prevent students being stranded etc.

Refer NG document: ["Transport: General Considerations"](#)

## 19. Planning

Planning should reflect the consideration of Legal and good practice requirements, ensuring:

- The plan is based on **Streatham Wells Primary School** procedures.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

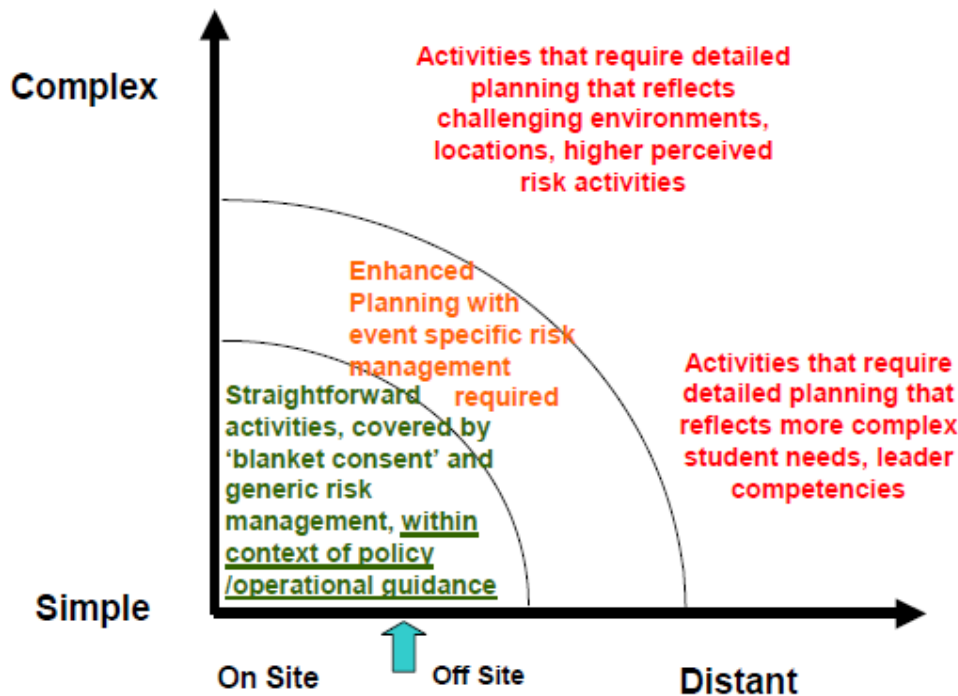
It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brain storming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigor, then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and also be a vital part of the risk management process in providing some objectivity in a "Risk Benefit Analysis". Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

This supports the move towards developing activity-specific guidance at establishment level for regular or routine activities. Such should guidance be robust making it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The degree of complexity of a particular plan (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as "**SAGED**" as explained below.

- **Staffing requirements** – trained? experienced? competent? ratios?
- **Activity characteristics** – specialist? insurance issues? licensable?
- **Group characteristics** – prior experience? ability? behaviour? special and medical needs?
- **Environmental conditions** – like last time? impact of weather? water levels?

- Distance from support mechanisms in place at the home base – transport? residential?



Refer to NG document: *“Planning Basics”*

Example Streatham Wells School trips

Straightforward – Sports Tournaments, local park, local post office, use of cob oven, cooking

Enhanced Planning – Outward Bound residential, Museums and Galleries in London, Velodrome

Challenging Environments – Camping Year 5

## 20. Consent

In our parent contract parents’ consent to the following:

- 1 **School Trips:** A variety of school trips will be provided for your child while a pupil here. **Parents' prior consent will be sought for all trip outside of the local area and those incurring additional costs.** School trips in the United Kingdom involving an overnight stay will be the subject of a separate agreement with parents. The cost of the trip will be payable in advance. The Pupil is subject to the School Behaviour Policy whilst engaged in a School trip.
- 2 *School Trips & Transport:* We consent to my/our child taking part in school trips which do not involve an overnight stay and I/we consent to my/our child being carried by public transport .

When an activity is part of a planned curriculum in normal curriculum time, in the local area and no parental contributions are requested, then additional formal consent is not necessary.

Almost all trips require communication with parents as specific information needs to be given on timings, and consent gained. Example trip letters are available on the Streatham Wells Primary School intranet.

All residential trips and adventurous activities require specific parental consent.



## 21. The Value and Evaluation of LOtC

The Ofsted report "[Learning Outside the Classroom – How Far Should You Go?](#)" (October 2008) makes statements in the strongest terms to support the value of LOtC, including the fact that it raises achievement. Refer to NG document: "[Ofsted and LOtC Summary](#)"

However, it also highlights the finding that *even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigour* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the National Guidance document:

5.1c "[Rigorous Evaluation of LOtC: Meeting Ofsted Expectations and Assuring Quality](#)".

### Appendix A

#### Adventure Activities

Below is a list of 'Adventure Activities' as agreed by Local Authority outdoor education advisors.

Before our students take part in any of these we need to be sure that the relevant National Governing Body qualifications are held by the person/organisation running the activity or a technical advisor has provided a statement of competence.

- All activities in 'open country' such as D of E Expeditions.
- Swimming (all forms, excluding publicly life guarded pools)
- Camping where participants/leaders erect tents and/or self-cater.
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- All other forms of boating (excluding commercial transport)
- Hill walking and Mountaineering
- Mountain biking
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- archery
- Horse riding
- High level ropes courses
- Track cycling
- Other activities (e.g. initiative exercises) involving skills/risks inherent in any of the above

Version	Authors	Updated by SLT (date & sign)	Reviewed by sub-committee (date & sign)	Signed off by Governing Body (date & sign)
0.1	LS	9.06.16	14.06.16	14.06.16