



## LORDSWOOD GIRLS' SCHOOL & SIXTH FORM CENTRE

This policy is called:	Policy and Guidance for Educational Visits and Learning outside the classroom
It applies to:	Lordswood Girls' School and Sixth Form Centre
Person responsible for revision:	Work Placement & Employer Engagement Co-ordinator
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Approval by:	Governing Body
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<b>DOCUMENT STATUS:</b>	Model Policy adopted from Birmingham City Council (BCC) Policy and Guidance
<b>RELATED DOCUMENTS:</b>	Outdoor Education Advisers Panel National Guidance for the Management of Outdoor Learning Off-site Visits and Learning Outside the Classroom Activities [Reviewed and updated on regular basis]
	DfE Guidance 2014 Advice on Legal Duties and Powers for Local Authorities, Head Teachers, Staff and Governing Bodies
	Health and Safety Executive 2011 School trips and outdoor learning activities: Tackling the health and safety myths.
	BCC Guidance - Critical Incidents Management; Guidance for Schools latest update
<b>SUPERSEDED DOCUMENTS:</b>	DfE Guidance 1998 – Health and Safety of Pupils on Educational Visits (HASPEV) and Part 1, 2, & 3 supplements
	BCC Learning Beyond the Classroom 2006 Policy and Guidance for Educational Visits;
	DfE Guidance 2001 – Health and Safety: Responsibility and Powers

**Incorporating the “National Guidance” from the Outdoor Education Advisers Panel  
Policy and Guidance for Educational Visits and Learning Outside the Classroom**

**Flowchart for Organising Visit/Offsite Activity**  
(Please refer to [www.oeapng.info](http://www.oeapng.info) for copies of guidance forms)

## 1. Provision of Employer Guidance

Lordswood Girls' School & Sixth Form Centre has formally adopted "**Outdoor Education Advisers Panel National Guidance for the Management of Outdoor Learning, Off-site Visits and Learning Outside the Classroom**". This guidance can be found on the following web site:

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

Anybody involved in educational visits and learning outside the classroom is strongly advised to read this policy before seeking information from the oeapng website.

It is a legal expectation that employees of Lordswood Academies Trust **must** work within the requirements of the Lordswood Girls' School policy and guidance. Trust employees must follow the requirements of 'Outdoor Education Advisers Panel National Guidance' as well as the requirements of this document.

Where a member of staff commissions an educational visit or learning outside the classroom activity, they must ensure that the provider has either:

1. adopted the Birmingham City Council Policy and Guidance and the OEAP National Guidance

Or

2. have systems and procedures in place where the standards are as robust as those required by the OEAP National Guidance.

## 2. Scope and Remit

The OEAP National Guidance document: 1c "**Status and Remit and Rationale**" 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 children and young people undertaking experiences beyond the boundary of their normal classroom or environment;
- direct supervision of children and young people undertaking experiences that fall within the remit of learning outside the classroom;
- facilitating experiences for children and young people undertaking experiences beyond the boundary of their normal classroom or environment;
- deploying staff who will supervise or facilitate experiences for children and young people undertaking experiences beyond the boundary of their normal environment;
- this guidance may be applicable for all those supervising vulnerable adults as there is a transfer of good practice for the wider use of educational visits;

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 National Guidance document: 3.2a "**Underpinning Legal Framework and Duty of Care**"

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### 3. Ensuring Understanding of Basic Requirements

As an employer, the Trust is required to ensure that its employees are provided with:

- access to appropriate guidance relating to educational visits and learning outside the classroom activity;
- access to appropriate 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 accredited advisers who have proven expertise and professional understanding of the guidance.

The relevant training courses are:

1. Educational Visit Coordinator (EVC) Training – all schools are required to have a current trained EVC in post. If the responsibility for educational visits and learning outside the classroom is not delegated to a nominated trained EVC, then that role will rest with the Headteacher by default. The Headteacher should therefore undertake EVC training.
2. Educational Visit Coordinator (EVC) Revalidation - all schools are required to ensure that their EVC undertakes a revalidation every three years.
3. Visit Leader Training – this course is ***strongly recommended*** for all those who lead learning outside the classroom activities in Birmingham from October 2014. To meet OEAP National 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.

For the purposes of day-to-day updating of information, Birmingham EVCs and Visit/Activity Leaders are directed to the posting on “***School Noticeboard***” - [www.birmingham.gov.uk/schoolnoticeboard](http://www.birmingham.gov.uk/schoolnoticeboard).

Where a member of staff experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should speak to the Educational Visits Coordinator (EVC).

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

The Headteacher is responsible for approving each visit. Approval in principle should be sought from the Headteacher at the outset before any financial commitment is made.

All visits involving adventurous activities, all visits to ‘wild country’ and Duke of Edinburgh Award expeditions, overseas and residential visits **must** be notified to the Governing Body using the form at **Appendix A**. Non adventurous activities do not require notification e.g. visits to any museum, local parks, the theatre, theme parks such as Alton Towers. Staff should speak to the EVC if unsure.

Permission should be sought from the Governing Body:-

- one year in advance for overseas visits;
- one term in advance for residential visits;
- half a term in advance for day trips which fall into the adventurous activities category.

This is the timeline to be followed for submission of the application form to the Senior Leadership Team. The form at **Appendix B** is for visits of a day and at **Appendix C** for residential trips.

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## 5. Risk Management

The School has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level. This requires that 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 and the School will adopt a “Risk-Benefit Assessment” approach, where the starting point for any risk assessment is a consideration of the targeted benefits and learning outcomes. 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 a requirement for the risk assessment 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 individuals. EVC Training ensures that establishments are supplied with electronic generic risk-benefit assessments for educational visits and learning outside the classroom. Please refer to **Appendix D** for a Risk-Benefit Assessment template. This assessment should be reviewed and, if necessary, amended after the visit has taken place and the reviewed document should be passed to the EVC who will file for future reference.

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

Refer to OEAP National Guidance document: 4.3c **“Risk Management - an overview”**

Refer to OEAP National Guidance document: 4.3f **“Risk Management – some practical advice”**

Refer to OEAP National Guidance document: 4.3g **“Risk Management – what to record and how”**

## 6. Emergency Planning and Critical Incident Support

A critical incident is an incident where any member of a group undertaking an educational visit or learning outside the classroom activity has either:

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

Every visit leader and assistant leader must be familiar with emergency planning procedures and reporting mechanism. This forms part of the training delivered to EVCs and visit leaders.

Relevant emergency contact telephone numbers should be carried by leaders at all times during an offsite educational visit but should only be used in the case of a genuine emergency. Under no circumstances should these telephone numbers be given to young people or to their parents or carers.

Refer to OEAP National Guidance document: 4.1a **“Off Site Visit Emergencies: The Employer’s Role”**

Refer to OEAP National Guidance document: 4.1b **“Off Site Visit Emergencies: The Establishment’s Role”** Refer

to OEAP National Guidance document: 4.1i **“Emergencies and Critical Incidents – An overview”**

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Critical incident guidance can be found at **Appendix G**.

### **7. Monitoring and Quality Assurance**

The School will ensure that there is sample monitoring of educational visits and learning outside the classroom activities undertaken. Such monitoring should be in keeping with the recommendations of OEAP National Guidance. This will be carried out by a suitably qualified person external to the Trust.

Refer to OEAP National Guidance document: 3.2b **“Monitoring”**

### **8. Assessment of Leader Competence and Good Practice Requirements**

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of this Policy and Guidance that all leaders and their assistants have been formally assessed as competent to undertake the responsibilities of leading the educational visit or learning outside the classroom activity.

Refer to OEAP National Guidance document: 3.2d/4.4a **“Approval of Leaders”**.

To be deemed competent, a Visit/Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognised good practice for that role*.

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

OEAP National Guidance sets a clear standard to which leaders **must** work.

Staff participating in educational visits and learning outside the classroom activities 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 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 OEAP National Guidance document: 4.3a **“Good Practice Basics”**

### **9. Charges for Educational Visits and Off-site Activities**

Refer to the School's Charging and Remissions Policy.

### **10. Vetting and DBS Checks**

The Disclosure and Barring Service (DBS) was established under the Protection of Freedoms Act 2012. The primary role of the DBS is to help employers make safer recruitment decisions and prevent unsuitable people from working with vulnerable groups including children and young people.

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 children, young people or vulnerable adults.

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Careful consideration should be given to whether a voluntary helper may require a DBS Enhanced Disclosure. In general terms, those helpers with *frequent* or *intensive* contact e.g. working with a group or groups regularly or involved in accompanying a residential should be checked.

It is **essential** that the full contents of the document below are taken into account.

Refer to OEAP National Guidance document: 3.2g ***“Vetting Disclosure and Barring Service (DBS) Checks”***

### **11. 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 when on educational visits and learning outside the classroom activities.

Refer to OEAP National Guidance document: 4.3b ***“Ratios and Effective Supervision”***

Refer to OEAP National Guidance document: 4.2a ***“Group management and Supervision”***

### **12. Preliminary Visits and Provider Assurances**

All educational visits and learning outside the classroom activities should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group needs and 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. This will be required for all visits not organised by an external provider e.g. school travel company.

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 Learning Outside the Classroom Quality Badge
- AALS licensing
- Adventuremark
- Association of Heads of Outdoor Education Centres Gold Badge
- National Governing Body centre approval schemes (applicable where the provision is a single, specialist activity).

Where a provider holds one of the above accreditations, there should be no need to seek further assurances regarding risk assessments of the provider. The visit leaders should complete a risk benefit assessment and record any significant findings for any aspects of a visit that they are leading or responsible. This will usually include transport to and from the venue plus any stops or visits on route.

Refer to: OEAP National Guidance document 4.4h ***“Using External Providers and Facilities”***, 4.4f ***“Assessing an adventure provider Checklist”***.

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### **13. Adventure Activities Licensing Regulations**

The Governing Body, Headteacher, EVCs and visit leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA). The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

Leaders should be aware that the AALS licence is an assurance of safety. It does not accredit educational or activity quality.

Refer to OEAP National Guidance document: 3.2f *“Adventure Activity Licensing Regulations”*

### **14. Insurance for Educational Visits and Off-Site Activities.**

#### **Non-delegable duty of care**

In October 2013 the UK Supreme Court ruled that, in particular circumstances, schools and other public bodies have a non-delegable duty of care. This is an exception to the normal fault based principles of law. It means that, in these particular circumstances, schools and other organisations are liable to be sued for the negligence of a third party.

For example, a school contracts with a third party provider to deliver swimming lessons within school time. If, through the negligence of this third party, a child is injured, the child can sue the school and local authority for compensation. The fact that the school was not responsible for the actions of the third-party is irrelevant as; in this case, the school’s duty of care is non-delegable.

It is therefore important to ensure that any contracts entered into with third parties include terms to carry insurance including indemnity in the event of negligence as local authorities and schools will need to pursue independent third parties for an indemnity or contribution should any such claims succeed.

#### **Employer’s Liability Insurance**

Employer’s Liability Insurance is a statutory requirement. The Trust holds a policy that indemnifies it against its legal liability in respect of all claims for compensation resulting in bodily injury suffered by any Trust employee. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors.

#### **Public Liability Insurance**

The Trust also holds Public Liability Insurance, indemnifying it against its legal liability in respect of claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property. Employees (as agents of the Trust) are indemnified under the policy, as are voluntary helpers acting under the direction of the Trust’s staff. The indemnity covers activities such as educational visits and off-site activities including school sports, together with approved extracurricular activities organised by all establishments and settings for which the Trust is responsible.

#### **Employees**

The Trust’s insurance provides Personal Accident Cover to all employees, volunteers, pupils and students. This policy is active during the course of employment and / or whilst at school. The policy is a benefit policy and does not require the employee or pupil to prove negligence or breach of statutory duty.

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### **Insurance for Pupils**

The Trust only covers accidents to pupils that are covered by its liability insurance when due to its negligence these claims are covered within its Public Liability Insurance detailed above. Personal Accident Insurance for pupils is not arranged by the Trust but may be arranged for specific activities; however there is no statutory requirement for the Trust to arrange this cover. The cost of Personal Accident Insurance arranged by the school may be recharged to parents. Parents should be reminded that the Trust does not insure children's belongings.

For journeys/visits overseas, Foreign Travel Insurance is arranged that covers **all persons on the visit**. This is especially important, due to the high costs of medical care abroad and possible repatriation expenses in the event of an accident or illness.

The Trust also has worldwide cover which compliments the Personal Accident policy that also covers staff, volunteers, pupils and students whilst travelling abroad or in the UK for any kind of trip including winter sports.

The school should notify insurers if the activity involves any form of winter-dangerous sports as the insurers may need to charge an additional premium.

If additional insurance is not taken out, it is recommended that parents are advised of this and a suggested wording for parental consent forms is detailed below:

*"The school is insured against its legal liability to pay compensation should it be held responsible for causing an injury to your child whilst in our care.*

*The school has not taken out any additional insurance in respect of this visit e.g. personal accident, and, should you be concerned about this area of risk, you are advised to make your own personal arrangements".*

### **Car Insurance**

All staff using their private vehicles for school purposes, including transporting pupils, parents or other staff members, should ensure that their private motor insurance policy extends to provide them (the driver) with business use cover. They **should not** use their vehicle unless this extension of cover is operative.

Refer to OEAP National Guidance document: 4.4c **"Insurance"**

## **15. Inclusion**

Every effort should be made to ensure that educational visits and learning outside the classroom activities are available and accessible to all, irrespective of special educational or medical needs, disability, ethnic origin, gender, sexuality 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 should take all *reasonably practicable* measures to include all young people, unless risk assessment determines otherwise. In accordance with the Equality Act 2010 the principles of inclusion should be promoted and addressed for all visits and reflected in the School's policy, thus ensuring an aspiration towards:

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



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Refer to OEAP National Guidance document: 3.2c ***“Inclusion”***.

## **16. Duke of Edinburgh Award**

The Duke of Edinburgh Award (DofE) is available through schools, local youth clubs and voluntary organisations around the City.

All schools wishing to deliver the DofE must be a Directly Licenced Centre with the DofE and responsibility lies with them for in accordance with their licence with the DofE.

Where DofE expedition activities are involved all appropriate external and internal notifications and approvals should be gained. A DofE Expedition is notifiable as an adventurous activity.

Advice can be sought from the BCC Outdoor Education and Educational Visits Adviser.

The Regional D of E office can offer help and advice.

Further information can be found on the OEAP National Guidance Document: 7b ***“Duke of Edinburgh’s Award Expeditions”***

## **17. Transport**

Careful thought must be given to planning transport to support educational visits and learning outside the classroom (off-site) activities. 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.

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

Refer to OEAP National Guidance document: 4.5a ***“Transport: General Considerations”***

Refer to OEAP National Guidance document: 4.5b ***“Transport in Minibuses”***

Refer to OEAP National Guidance document: 4.5c ***“Transport in Private Cars”***

Refer to OEAP National Guidance document: 4.5e ***“Hiring a Coach”***

## **18. Planning and Consent**

Planning should reflect the School’s requirements, legal requirements and good practice requirements. It is a critical part of the Risk Benefit assessment and management process that this document is referred to:

Refer to OEAP National Guidance document: 5.2b ***“Planning Basics for Outdoor learning, Offsite Visits and Learning Outside the Classroom”***

The degree of complexity of a particular plan or policy (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’ and include:**

- Staffing requirements – trained? experienced? competent? ratios?
- Activity characteristics – specialist? insurance issues? licensable?
- Group characteristics – age? 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?

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To reduce bureaucracy and encourage activity, establishments need to take account of the legalities regarding a requirement for formal consent. When an activity is part of the school's curriculum or normal working practices and no parental contributions are requested, there may not be a need for specific parental consent. However, in the interests of good relations between the school and the home, it is good practice to ensure that those in a position of parental authority are fully informed. Consent forms are often used to update parent's/carer's current phone numbers, contact details plus any medical conditions which have developed since the last check.

It is good practice to obtain blanket parental consent for a range of regularly occurring activities or a specific programme.

It is also good practice to develop *activity-specific* policies at school level for regular or routine activities. Such policies should be robust and equate to "*operational guidance*" that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The subject of obtaining consent is a matter for individual school / establishment discretion provided they comply with law.

A student code of conduct must be completed for all residential and overseas visits: **Appendix H**.

Refer to OEAP National Guidance document: 4.3d "**Consent**"

## **19. IN THE EVENT OF A CRITICAL INCIDENT**

**During school hours: contact the School**

**Outside school hours: In the event of a serious incident, the first point of contact is the Headteacher.**

### **Links to other policies**

#### **Critical Incident policy**

<https://drive.google.com/file/d/1CJGeWaj2EMa26LBCUoZE8Aemwz5qXbD2/view>

#### **Charging & Remissions policy**

<http://lordswoodgirls.co.uk/wp-content/uploads/2020/09/Charging--Remissions-Policy.pdf>