



Policy for  
Educational Visits, Outdoor Learning and  
Adventurous Activities

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# Introduction

We acknowledge the immense value of educational visits to young people, and fully support and encourage those that are well planned and managed. Learning Outside the Classroom has a vital part to play in meeting the demands of a broad and balanced curriculum, and in achieving the goal of preparing young people for life beyond school. Effective schools have always used educational visits, residential experience and activity in the local area of the school and school grounds as an integral part of their whole-school approach.

This policy sets out the framework within which all employees must operate.

“National guidance for the management of outdoor learning, off-site visits and learning outside the classroom” ([www.oeapng.info](http://www.oeapng.info)) has been adopted as our guidance for good practice for outdoor learning, educational visits and adventurous activities. In this policy this is referred to as ‘National Guidance’.

Support, training and access to further guidance can be obtained from North Yorkshire Educational Visits Advisory Service.

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## 1. Scope and responsibilities

### Scope

This policy applies to all off-site educational visits and all outdoor learning and adventurous activities regardless of location involving children and young people and where appropriate, adults.

It applies regardless of whether the activities take place within or outside of normal working hours, including weekends and holiday periods.

It does not apply to work-experience placements, work-related learning or alternative provision.

### Responsibilities

All employees and volunteers involved in the planning, management and leadership of all off-site educational visits and all outdoor learning and adventurous activities must follow this policy.

In addition the Outdoor Education Advisers’ Panel (OEAP) National Guidance sets out the responsibilities and functions of the following key roles:

- Employer - 3.4a, 3.4b, 3.4c,
- Outdoor Education Adviser - 3.4d
- Governors - 3.4f
- Headteacher / Manager - 3.4g
- Educational Visits Co-ordinator (EVC) – 3.4j
- Visit Leadership Team – 3.4k

**Refer to** individual National Guidance documents referenced as above.

## 2. Establishment policy and procedures

All establishments offering activities within the scope of this policy:

- Must have an EVC who meets the requirements set out in National Guidance.
- The EVC must complete training and revalidation as specified in ‘**Educational Visits Co-ordinator Training and Revalidation**’ below.
- Establishments must have their own Educational Visits policy which sets out their management and approval procedures. All establishment Educational Visits Policies must be consistent with National Guidance and this policy.

Refer to National Guidance document:

- 3.4j Educational Visits Co-ordinator (EVC)

### Consent

The establishment’s educational visit policy should make clear the system for ensuring that parents and guardians are informed of offsite activities and, where required, ensure consent is in place.

The DfE outlines the legal framework for consent in ‘Health and safety: advice on legal duties and powers for local authorities, school leaders, school staff and governing bodies’. This states that consent is not required for most activities in school time and where required, can be obtained at the point of entry to the school.

Consent is required for any visit beyond the school day or which is not part of the routine curriculum.

Consent is required for all visits organised by establishments other than schools.

Refer to National Guidance document:

- 4.3d Parental Consent

Refer to Amendable Forms in the resources of Evolve

### Staff competence

Staff leading, managing or approving off-site educational visits, outdoor learning and adventurous activities must be competent and confident to carry out their role and be approved by their Head of Establishment and where appropriate their Employer.

### Educational Visits Co-ordinator Training

Every establishment must appoint a trained EVC. New appointee’s must complete an OEAP accredited EVC training course and attend an accredited revalidation session every three years. These courses cover the strategic leadership and management of off-site educational visits, outdoor learning and adventurous activities.

### Competence to lead visits

There should be a clear process for approving leaders to lead visits or activities. Leaders must be accountable, confident and competent to lead the specific visits or activities for which they are approved. The Head or EVC (when the responsibility is delegated) must make a judgement about the suitability of that person to lead that group on that visit/activity in that environment.

The single most important factor in ensuring the safety of participants involved in an Educational Visit is the competence of the Visit Leader. The EVC should therefore consider the following when assessing the competence of a member of staff to lead, or accompany a visit:

- What are the leader’s reasons for undertaking the visit?
- Is the leader an employee and if not, is there a clear line of accountability?

- Can the leader/leadership team appropriately manage the teaching and learning in addition to the health, safety and welfare of the young people?
- Do all accompanying adults have a defined role?
- Is the leader organised?
- Are the leader/leadership team competent in managing risk?
- What experience has the leader of the young people he/she intends to lead?
- What is the leader's and leadership team's prior experience of similar visits or activities?
- Has the leader been inducted into the establishment's procedures?
- What experience has the leader of the environment/geographical area chosen?
- Do the leader/leadership team possess appropriate qualifications?
- If appropriate, what are the leader's and leadership team's personal levels of skill in the activity, and fitness level?
- If leading adventurous activities have all the leaders been approved by the Employer/Adviser?
- Has the leader addressed medical, first aid and inclusion issues?
- Is the leader aware of, and able to comply with all relevant guidelines?

The establishment should contact North Yorkshire Educational Visits Advisory Service if there is doubt regarding the competence of a member of staff to lead a visit.

## Visit Leader Training

North Yorkshire Educational Visits Advisory Service provides Visit Leader training courses for staff leading and supporting educational visits. These courses cover planning and leadership of off-site educational visits, outdoor learning and adventurous activities.

Refer to National Guidance document:

- 3.2d/4.4a Approval of Leaders

## 3. Planning and approval procedures

### Learning Outcomes

When making the decision to plan an off-site activity it is essential to consider the justification for the visit, how it fits into the curriculum and what the participants will gain from the experience i.e. what are the learning outcomes for the activity. Opportunities can be described as:

- A *crucial* educational activity that is required to be undertaken by children or young people in order to meet statutory curriculum requirements.
- An *important* educational activity that is embedded in curriculum and course delivery, whereby learning is significantly disadvantaged through non-attendance.
- A *valuable* educational activity that relates closely to curricular content.
- An *optional* experience that promotes social and personal development, or an appreciation of the wider world.

'Crucial' and 'important' activities can be viewed as educational visits whereas 'valuable' and 'optional' activities can be viewed as trips.

In addition to ensuring that appropriate outcomes have been considered it is also essential to get the proportionality of planning right.

## Risk Management

Risk management is an inherent part of visit planning, should be proportionate to the complexity of the visit being undertaken and evidenced. This may include:

- generic risk assessments/operational procedures
- specific risk assessments

Risk management is the responsibility of the whole staff team led by the visit leader

Refer to National Guidance documents:

- 4.3c Risk management – an overview
- 4.3f Risk management – some practical advice
- 4.3g Risk management – what to record and how

## Approval before contractual arrangements are made

Visit Leaders must gain approval from the Head of Establishment before any contractual arrangements or financial commitments are made. Heads of Establishment must ensure that any overriding contractual arrangements are made between the establishment and the provider rather than between parents and provider.

## Pre-visits

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 requirements. Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement.

## Self-led adventurous visits

Staff proposing to lead adventurous activities must be approved by the Head and Employer prior to embarking on detailed arrangements.

## Working with providers

When an establishment is using a provider for teaching and instruction, that provider is responsible for the risk management of their provision. The Visit Leader is responsible for risk management of any aspects of the visit which they lead themselves, including all non-taught time and travel.

Visit Leaders should take advantage of nationally accredited provider assurance schemes to select suitable providers. This includes the Learning Outside the Classroom Quality Badge and adventurous activity accreditation schemes.

**Where a provider holds the above accreditation, there should be no need to seek further assurances regarding safety. Visit Leaders should ensure that a Provider Statement is completed whenever this assurance scheme is not held.**

Certain adventurous activities require adventurous activities accreditation which will either be captured through a Learning Outside the Classroom Quality Badge or a Provider Statement.

External Providers must hold a minimum of £5 million Public Liability insurance.

## Accommodation

Appropriate checks and/or assurances should be sought. The accommodation at an LOTC Quality Badged provider will have been deemed appropriate for educational visits. The relevant questions on the Provider Statement can be used to help gather key information. Professional judgment should be used taking into account all the relevant issues.

## Ratios and supervision

As part of managing the risk of educational visits, outdoor learning and adventurous activities, visit leaders should determine the appropriate supervision arrangements by considering:

- **Staffing**  
For example: Consider whether the adults have undertaken training, what level of experience they have and whether they know the group. Consider what level of competence is necessary (skill, knowledge, understanding, fitness) from all of the supervising adults. Ensure that all adults are competent for the roles that are assigned to them.
- **Activity**  
For example: Consider the nature of the intended activity and whether it requires specialist knowledge and/or equipment. Consider whether the activities might be affected by the location (crowds, remoteness, access etc.).
- **Group**  
For example: Consider the characteristics of the group and what prior experience they have of the activity and environment; also consider their ability and maturity. If any of the group has behavioural, medical or learning needs, ensure that these can be managed appropriately.
- **Environment**  
For example: Consider the impact that the weather may have on the group, activity or travel arrangements. Be aware that environmental conditions can change dramatically and ensure that there is a Plan B where appropriate. Where relevant to the location and activity, the visit leader must have a good understanding of how water levels can change and be able to make appropriate judgements.
- **Distance**  
For example: Consider how far the activity or visit is from the normal support mechanisms of the school and whether it is close enough to rely on immediate support from the school, or further afield where it cannot. The type of transport being used may impact on the level of supervision required (a coach journey may require a smaller supervision ratio than a visit using public transport). If the visit involves an overnight stay, a higher level of first aid competence may be necessary, and staff may need to operate a supervision rota for longer residential visits.

EVCs and Heads of Establishment are responsible for ensuring effective supervision is in place on all visits.

**Refer to** National Guidance documents:

- 3.2f AALA Licensing
- 4.3b Ratios and effective supervision
- 4.4b First aid
- 4.4c Insurance
- 7a Adventurous activities

**Refer to** DfE advice [www.gov.uk](http://www.gov.uk):

- Early Years and Foundation Stage Statutory Guidance.

## 4. Visit Planning and Management System

The employer provides a planning and management system (Evolve) to facilitate the efficient planning, management, approval and evaluation of visits.

Establishments should detail in their own policy which local, normal, routine educational visits will be planned through the system and which will be recorded locally.

Any off-site educational visit, outdoor learning or adventurous activity which involves an external provider for teaching or instruction must be planned and approved through the employer system.

Adventure activities run on the school/establishment site should also be planned and approved through the employer system – refer to guidance for a list of typical activities classed as adventurous for the purposes of this policy.

Overseas expeditions require enhanced planning and establishments considering this should contact North Yorkshire Educational Visits Advisory Service before booking – preferably at least 18 months prior to the planned event.

Refer to appropriate guidance

## 5. Incident Management

Heads of Establishment must ensure that there are appropriate procedures in place for all visits. These should be under the umbrella of an Incident Management Plan which allows any type of incident to be appropriately dealt with. Establishments must also ensure they are familiar with their employer's procedures.

The Visit Leadership team should use the Visit Incident Management Action Card. The Base Contact should follow the Establishment Incident Management Plan.

Staff should undergo training at an appropriate level to ensure that they understand the procedures. Incident Management plans should be tested from time to time at both establishment level and employer level.

Refer to appropriate guidance

Refer to DfE advice [www.gov.uk](http://www.gov.uk):

- Model School Emergency Plan

Refer to further guidance:

- Employer and Establishment Incident Management Plans

### Visit Incident Management training

Visit Incident Management courses are available for senior leadership teams in order that they are appropriately prepared for managing and co-ordinating the establishment's response to critical visit incidents.



## 6. Monitoring of visits and procedures

Heads of Establishments should ensure that visits and visit management procedures are monitored to ensure the requirements of this policy are being carried out. This monitoring should be along similar lines to the evaluation of teaching and learning in the classroom. It should be clear in the establishment visit policy who is responsible for carrying out this monitoring. This may be supplemented by field monitoring by North Yorkshire's Educational Visits Advisory Service.

Refer to appropriate guidance

Refer to National Guidance document:

- 3.2b Monitoring

## 7. Charges for Off-site Activities and Visits

### Charging and remissions

The Education Act 1996, sections 449-462 sets out the law on charging for school activities in England. The Department for Education provides guidance to Heads of Establishment of Establishments and Governing Bodies as to the requirements of a charging & remissions policy, voluntary contributions and what can or cannot be charged for.

Refer to National Guidance document:

- 3.2c Charging for school activities

Refer to DfE document [www.gov.uk](http://www.gov.uk):

- Charging for School Activities [www.gov.uk](http://www.gov.uk)

## 8. Inclusion & SEND

Activities should be available to all, irrespective of special educational or medical needs or protected characteristics (disability, gender re-assignment, pregnancy and maternity, race, religion or belief, sex, sexual orientation).

### Special Educational Needs and Disabilities

The Equality Act states that an establishment (a school) must not discriminate against a young person because of one of the protected characteristics. There is a duty to make reasonable adjustments. Establishments must have due regard to equality considerations whenever significant decisions are being made or policies developed. Consideration must be given to the equality implications from the start of the planning process, not as an afterthought.

Any individual risk assessment, behaviour/care plan should inform the planning process. Appropriate levels of supervision and staff with the necessary competences/training should be in place (intimate care/feeding; manual handling; team teach/restraint; administering rescue medicines). If a decision is taken to exclude a young person (if the necessary reasonable adjustment(s) would unduly impinge on the learning outcomes for the rest of the group) then:

- All relevant parties must have been consulted throughout the process
- there must be a clear rationale
- the process should be carefully recorded with a clear audit trail evident

### Behaviour

It may be reasonable to exclude a young person on the grounds of behaviour if the behaviour is unmanageable and presents a significant health, safety and/or welfare risk to the young person, the group or the leaders. Where behaviour issues are not associated with a protected characteristic then the Equality Act may not apply.

Refer to National Guidance documents:

- 3.2e Inclusion
- 4.4i Special Educational Needs and Disabilities

Refer to DfE advice [www.gov.uk](http://www.gov.uk):

- Equality Act 2010: advice for schools

## 9. Safeguarding

Safeguarding procedures should be considered as part of the planning process with additional consideration for residential visits. Visit Leadership Teams should:

- As part of planning, liaise with the Designated Safeguarding Lead (DSL) and other staff to identify any relevant safeguarding issues
- Have access during a visit to the DSL (or trained deputy) either directly or through the Base Contact.
- Ensure appropriate vetting and barred list checks are in place (including enhanced DBS and barred list checks for unsupervised adults engaged in regulated activities)
- Consider issues relating to on-line safety, social media, access to and sharing of inappropriate content
- Know how, when and who to report safeguarding concerns to during a visit
- Be familiar with Safer Working Practice principles

### Disclosure and Barring Service (DBS) Checks

Non-employees involved in off-site visits will require an enhanced DBS check with barred list check if they meet each of the following criteria:

- They are involved in a regulated activity
- They are unsupervised
- The activities are carried out frequently or intensively

Refer to National Guidance documents:

- 3.2g Vetting and Disclosure and Barring Service (DBS) Checks
- 4.3e Safeguarding

Refer to DfE advice [www.gov.uk](http://www.gov.uk):

- Keeping Children Safe in Education
- Safer Working Practice Guidance

## 10. Insurance

### Travel/Journey Insurance

Establishments should ensure they have appropriate travel/journey insurance in place which covers participants for all activities on the visit. Establishments should consult their insurers to establish that cover is in place for unusual or overseas visits as required.

### Public Liability and Employer's Liability

Establishments should ensure that their Public Liability and Employer's Liability covers the establishment, employees and non-employees during any activity undertaken during the visit.

Refer to National Guidance document:

- 4.4c Insurance

## 11. Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is more hazardous to travel to an activity than to engage in it and establishments **must** follow any specialist guidance provided by your employer.

### Cars

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

### Coaches

Establishments should ensure that coaches and buses are hired from a reputable company.

### Minibuses

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. In addition on longer journeys consideration should be given to factors such as driver fatigue and comfort breaks.

Refer to National Guidance documents:

- 4.5a Transport: General Considerations
- 4.5b Transport in Minibuses
- 4.5c Transport in private cars
- 4.5e Hiring a coach

Refer to DfE advice [www.gov.uk](http://www.gov.uk):

- Driving school minibuses: advice for schools and local authorities