

Educational Visits & Outdoor Learning



Review Date

September 2023

Ratified

October 2023

Next Review

September 2025

Responsible Directorate

Operations

Four Critical Questions

*These four critical questions make it clear who we are and what we do.
We ask ourselves these questions to guide our work and our improvement.*

Why do we exist?

To **transform life chances** by achieving the highest possible standards and preparing all our students to lead successful lives.

How do we behave?

- **Hard work**
We are determined to see things through to the end and are resilient when faced with challenges.
- **Integrity**
We do the right thing because it is the right thing to do.
- **Teamwork**
We work together to help everyone succeed.

What do we do?

- We educate, safeguard and champion all our learners.
- We set high standards for ourselves and our learners.
- We build the powerful knowledge and cultural capital which stimulate social mobility and lifelong learning.

How will we succeed?

1. Aligned autonomy
2. Keeping it simple
3. Talent development

Contents

	Statement of Intent	4
1	Provision of Employer Guidance	4
2	Scope and Remit of this Policy	4
3	Ensuring Understanding of Basic Requirements	5
4	Approval and Notification of Activities and Visits	6
5	Risk Management	6
6	Emergency Planning and Critical Incident Report	6
7	Monitoring and Quality Assurance	7
8	Assessment of Leader Competence and Good Practice Requirements	7
9	Charges for Educational Visits and Off-Site Activities	8
10	Vetting and DBS Changes	8
11	Requirement to Ensure Effective Supervision	8
12	Preliminary Visits and Provider Assurances	9
13	Adventure Activities Licensing Regulations	9
14	Insurance for Educational Visits and Off-Site Activities	10
15	Inclusion	11
16	Duke of Edinburgh Award	12
17	Transport	12
18	Planning and Consent	12
19	In the Event of a Critical Incident	13
20	Approval Procedures	13
21	Recommended Ratios	16

Statement of Intent

To reach their potential, children and young people need experiences which broaden their horizons, enrich their cultural experience and understanding and improve their wellbeing. The spirit of this policy is rooted in our commitment to enrichment in all possible senses.

This policy simplifies the systems in place for supporting *Educational Visits* and *Learning Outside the Classroom* in our academies.

It is essential that qualified competent staff can lead and undertake these activities and experiences safely, carefully weighing up the benefits against the risks. Training is provided to enable professionals the confidence to take part in these activities with their young people. Appropriate courses can be found in this policy and guidance document.

1 | Provision of Employer Guidance

- 1.1 We have formally adopted the guidance *Outdoor Education Advisors' Panel National Guidance for Management of Outdoor Learning, Off-Site Visits and Learning Outside the Classroom*. This guidance can be found on the [OEAP website](#) and provides a suite of guidance and documents that cover all elements of managing and delivering Educational Visits. The guidance is updated annually or when regulation changes.
- 1.2 Anybody involved in educational visits and learning outside the classroom is required to read this policy before seeking information from the [OEAP website](#).
- 1.3 Where an ATT colleague commissions an educational visit or learning outside the classroom activity, they must ensure that the provider either:
 - Complies with this policy and the OEAP National Guidance
 - Puts in place systems and procedures where the standards are as robust as those required by the OEAP National Guidance.

2 | Scope and Remit of this Policy

- 2.1 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 includes any 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.

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

2.3 For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP National Guidance document: [3.2 Underpinning Legal Framework and Duty of Care](#).

3 | Ensuring Understanding of Basic Requirements

3.1 As an employer, we are required to ensure that our colleagues 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.

3.2 The relevant training courses are:

- **Educational Visits Coordinator (EVC) training.** If a Principal does not delegate the responsibility for educational visits and learning outside the classroom to a nominated trained EVC in the academy, then that role will rest with the Principal by default. The Principal should therefore undertake EVC training.
- **Educational Visit Coordinator (EVC) Revalidation** – EVCs are required to undertake a revalidation at least every three years.
- **Visit Leader Training** – this course is compulsory for all those who lead learning outside the classroom activities. 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 essential. The training can be found on the Evolve website or an external provider if it is more convenient for the academy. Where an employee experiences issues with finding the material they are looking for, or requires clarification or further help and guidance, they should contact their establishment’s Educational Visits Coordinator (EVC).

4 | Approval and Notification of Activities and Visits

- 4.1 The Principal is responsible for approving each visit. Where academy establishment policies delegate these responsibilities and functions to others (including a qualified EVC), this must be clear. This is important for the formal notification and approval processes.
- 4.2 Approval in principle should be sought from the Principal as soon as possible before **any** financial commitment is made.
- 4.3 **Visits requiring approval must be submitted at least 4 weeks prior to the day of the visit wherever possible. However, in the case of complex visits (such as expeditions abroad), support should be sought.**

5 | Risk Management

- 5.1 The employer 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 employer to provide such support, training and resources to its employees as is necessary to implement this policy.
- 5.2 The risk management of an activity should be informed by the benefits to be gained from participating. We use a *Risk-Benefit Assessment* approach, whereby the starting point for any risk assessment should be 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.
- 5.3 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 (e.g. those that may cause serious harm to individuals). EVOLVE ensures that establishments are supplied with electronic generic risk-benefit assessments for educational visits and learning outside the classroom. Refer to OEAP National Guidance document: [4.3C Risk Management](#).

6 | Emergency Planning and Critical Incident Support

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

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

Academies must have prior knowledge of the Trust's *Critical Incident and Business Continuity Plan*.

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

6.3 Relevant emergency contact telephone numbers should be carried by leaders at all times during an off-site 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 documents: [4.1A Off-Site Visit Emergencies: The Employer's Role](#), [4.1B Off-Site Visit Emergencies: The Establishment's Role](#), and [4.1I Emergencies and Critical Incidents – An Overview](#).

7 | Monitoring and Quality Assurance

7.1 Academies and other education settings should 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. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the EVC and uploaded to EVOLVE. Refer to OEAP National Guidance document: [3.2B Monitoring](#).

8 | Assessment of Leader Competence and Good Practice Requirements

8.1 OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of ATT 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 Assessment of Competence](#).

8.2 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.

- 8.3 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

- 9.1 Please refer to our *Charging and Remissions* Policy for details.

10 | Vetting and DBS Changes

- 10.1 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, or young people.
- 10.2 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 OEAP National Guidance document [3.2G Vetting Disclosure and Barring Service \(DBS\) Checks](#) are considered.

11 | Requirement to Ensure Effective Inspection

- 11.1 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. However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years. Refer to OEAP National Guidance documents [4.3B Ratios and Effective Supervision](#) and [4.2A Group Management and Supervision](#).

12 | Preliminary Visits and Provider Assurances

12.1 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 riskmanagement. 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.

12.2 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).

12.3 Where a provider holds one of the above accreditations, there should be no need to seek further assurances regarding risk assessments of the provider. Academies should ensure that leaders 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](#).

13 | Adventure Activities Licensing Regulations

13.1 Employers Principals/Managers, EVCs and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

13.2 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).

- 13.3 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 Adventurous Activity Licensing Regulations](#).

14 | Insurance for Educational Visits and Off-Site Activities

Non-Delegate Duty of Care

- 14.1 In October 2013 the UK Supreme Court ruled that, in particular circumstances, academies 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, academies and other organisations are liable to be sued for the negligence of a third party.
- 14.2 For example, the academy 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 academy and ATT for compensation. The fact that the academy was not responsible for the actions of the third-party is irrelevant as, in this case, the academy's duty of care is non-delegable.
- 14.3 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 we will need to pursue independent third parties for an indemnity or contribution should any such claims succeed.

Employer's Liability Insurance

- 14.4 Employer's Liability Insurance is a statutory requirement. We hold a policy that indemnifies us against its legal liability in respect of all claims for compensation resulting in bodily injury suffered by any ATT colleague. As this type of policy is a statutory requirement any other employer should hold a similar policy in respect of its employees. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors.

Public Liability Insurance

- 14.5 We also hold Public Liability Insurance, indemnifying us against our legal liability in respect of claims for compensation for bodily injury from persons not in its employment, as well as for the accidental loss of, or damage caused to, property. Employees (as agents of the employer) are indemnified under the policy, as are voluntary helpers acting under the direction of the employer'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 employer is responsible. **We insist It is recommended that parents obtain an E111/EHIC for trips in countries in the EU.**

Employees

- 14.6 ATT is part of the government backed Risk Protection Arrangement: [The risk protection arrangement \(RPA\) for schools - GOV.UK \(www.gov.uk\)](http://www.gov.uk). The cover under this agreement provides all ATT employees, in the course of their employment, predetermined benefits in the event of an accident. The scheme's benefits are designed to provide compensation for injury where the employer is not deemed negligent.

Insurance for Pupils

- 14.7 For journeys/visits overseas, ATT is part of the government backed Risk Protection Arrangement. [The risk protection arrangement \(RPA\) for schools - GOV.UK \(www.gov.uk\)](http://www.gov.uk) Please see further details for travel cover on the link above. The RPA operates on a no material fact disclosure basis so you do not need to notify the RPA of any trips including winter sports.
- 14.8 For all journeys within the United Kingdom ATT is part of the government backed Risk Protection Arrangement. [The risk protection arrangement \(RPA\) for schools - GOV.UK \(www.gov.uk\)](http://www.gov.uk) Please see further details for travel cover on the link above. The RPA operates on a no material fact disclosure basis, so you do not need to notify the RPA of any trips.
- 14.9 It must be remembered that the ATT public liability arrangements apply for to all academy organised activities, including visits within the UK and abroad.

15 | Inclusion

- 15.1 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 children and 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.
- 15.2 Establishments should take all reasonably practicable measures to include all children and 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 establishment's policy, thus ensuring an aspiration towards:

- An establishment to participate.
- Accessibility through direct or realistic adaptation or modification
- Integration through participation with peers

15.3 Refer to OEAP National Guidance document [3.2E Inclusion](#). We should be especially mindful of the ways in which we might support disadvantaged pupils and those for whom we receive pupil premium funding.

16 | Duke of Edinburgh Award

16.1 The Duke of Edinburgh Award (DofE) is available through some ATT academies.

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

16.3 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.

16.4 Advice can be sought from the Outdoor Education and Educational Visits Adviser. The Regional DofE office can offer help and advice. You can also refer to OEAP National Guidance document [7B Duke of Edinburgh's Award Expeditions](#).

17 | Transport

17.1 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, and further guidance will be provided to visit organisers on request.

17.2 The Visit Leader should ensure that coaches and buses are hired from a reputable company. Refer to OEAP National Guidance documents [4.5A Transport: General Consideration](#), [4.5B Transport in Minibuses](#), and [4.5C Transport in Private Cars](#).

18 | Planning and Consent

- 18.1 It is a critical part of our 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, Off-Site Visits and Learning Outside the Classroom](#).
- 18.2 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** – Training, experience, competency, ratios
 - **Activity characteristics** – Specialism, insurability, licensability
 - **Group characteristics** – Age, prior experience, ability, behaviour, special and medical issues
 - **Environmental conditions** – Impact of weather, water levels, previous issues
 - **Distance from support mechanisms in place at the home base** – Transport, accommodation
- 18.3 To reduce bureaucracy and encourage activity, Principals need to take account of the legalities regarding a requirement for formal consent. When an activity is part of an academy’s routine 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 establishment and the home, it is very best practice to ensure that those in a position of parental authority are fully informed. Consent forms are also often used to update parent’s/carer’s current phone numbers, contact details plus any medical conditions which have developed since the last check (helping us to keep all Bromcom records up to date in our academies).
- 18.4 The subject of obtaining consent is a matter for individual academy or establishment discretion provided they comply with law and take account of GDPR requirements. Refer to OEAP National Guidance document: [4.3D Consent](#).

19 | In the Event of a Critical Incident

- 19.1 The EVC and Visit Travel leader should be aware and have read the trust Critical Incident and Business Continuity Plan and have access to an electronic copy of the policy with them on the visit.

20 | Approval Procedures

20.1 All visits will require a full list of pupils involved, and relevant contact and medical details to be left at school and taken on the excursion. Visits should be recorded, checked, and approved in accordance with the following procedures.

Category 1- Day Visits (Routine)

20.2 Visits that take place on a regular basis throughout the year, or over a specific period of time (e.g. a series of six weekly visits) (e.g. visits to local library /local museum/points of interest/swimming pool /away sports matches).

20.3 Category 1 visits should be recorded using: EVOLVE and checked and approved by the EVC and Principal and submitted at least 2 weeks prior to the trip taking place.

Category 2- UK Residential Visits

20.4 Visits that involve one or more nights away from home in UK.

20.5 Category 2 visits should be recorded using: EVOLVE and checked and approved by the EVC, Principal and final approval by ATT and submitted at least 4 weeks prior to the trip taking place.

Category 3- Overseas Visits

20.6 Residential or day visits to any place outside England/Scotland/Wales.

20.7 Category 3 visits should be recorded using EVOLVE and checked and approved by the EVC and Principal with final approval by ATT and submitted at least 6 weeks prior to the trip taking place.

20.8 For visits with significant financial commitment, *Outline Approval* from the Principal should be obtained before firm bookings are made.

20.9 If any of the above three types of visits involve what may be regarded as 'High risk activities or environments' they must be given classification of High Risk.

20.10 High Risk refers to all day visits, or residential or overseas visits that involve hazards which are significantly different or more serious (in terms of severity and/or likelihood) than might normally be encountered in everyday or academy life. For example: a weekly climbing day visit, a day visit to dry ski slope, a residential stay at outdoor centre, an overseas trekking expedition.

High-Risk Visits

20.11 All High-Risk visits should be checked and approved:

- Internally – by the EVC, Principal
- Externally – Final approval by our Director of Primary or Secondary Education

20.12 All High-Risk visits should be submitted for approval **at least 6 weeks in advance of the visit.**

21 | Recommended Ratios

21.1 Recommended ratios- rooted in best practice.

Foundation (2-5 Years)	1:5
Key Stage 1 (5-7 Years)	1:10
Key Stage 2 (8-11 Years)	1:10
Key Stage 3 (11-14 Years)	1:15
Key Stage 4 (14-16 Years)	1:15
Key Stage 5 (16-18 Years)	1:15