



Bankfields Primary School

Educational Visits and Outdoor Learning

Policy, Procedures and Guidance

September 2015

Document Control			
Applies To		Intranet	
Approval/Date	September 2015	Issue Date	
Author/Lead Officer	Adrian Clarke / John Antony	Page Content	
Council Website		Print Run	
Distribution List		Reference Number	
Division		Review Date	September 2016
Document Replaces	Outdoor Education and Educational Visits -- POLICY STATEMENT AND PROCEDURE	Status	Live version 4
Document Title	Educational Visits and Outdoor Learning Policy Procedures and Guidance	Version	Version 1.0
UNCONTROLLED IF PRINTED			
© HR Advisory Team, Redcar and Cleveland Borough Council, 2015			

1. Policy	5
1.1. Statement of Intent.....	5
1.2 Scope of the policy.....	6
1.3 Duties and responsibilities of all employees and non-employees.....	6
1.4 Duties and responsibilities of specific employees.....	7
1.4.1 Director of People Services.....	7
1.4.2 Outdoor Education Adviser.....	7
1.4.3 Governing Bodies or equivalent.....	8
1.4.4 Heads of Establishment.....	8
1.4.5 Educational Visits Co-ordinator.....	8
1.4.6 Visit and Activity Leaders.....	8
2. Procedures	9
2.1 Trained and competent staff.....	10
2.1.1 Visit Management and Leadership.....	10
2.2.2 Adventurous activities and outdoor learning qualifications.....	10
2.2 Approval before contractual arrangements are made.....	11
2.3 Planning and managing visits.....	11
2.3.1 SEND & Inclusion.....	11
2.3.2 Health & Well-being.....	11
2.3.3 First Aid provision.....	11
2.3.4 Insurance.....	12
2.3.5 Finance & charges.....	12
2.3.6 External providers and preliminary visits.....	12
2.3.7 Transport.....	12
2.4 Supervision and safeguarding.....	12
2.5 Risk management and emergency planning.....	13
2.5.1 Risk Management.....	13
2.5.2 Emergency planning.....	13
2.6 Consent and fully informing parents, notification and approval.....	14
2.7 Accidents, Incidents and near misses.....	15
2.8 Reviewing visits.....	15
2.9 Retention of records.....	15
3. Guidance	16
4. Appendix 1: Reference documents	17
Statutory legislation, regulations and guidance.....	17
Employer policies and guidance.....	17

National Guidance.....	17
Non-statutory advice	17
5. Appendix 1: Forms.....	18
OLEV 1: Educational Visits Summary.....	18
OLEV 2: Application for an educational visit	18
OLEV 3: Parental consent and medical information.....	18
OLEV 4: External Provider Statement.....	18

1. Policy

1.1. Statement of Intent

Each year schools and other establishments organise a wide variety of educational off-site visits, outdoor learning and adventurous activities locally, across the country and abroad.

The range of educational visits varies from a walk in the local area to residential experiences in Europe and beyond. The type of activity is similarly broad from on-site adventurous activities, local sports fixtures and cultural day visits to adventurous activities, expeditions, foreign exchanges and musical tours.

The purpose of this document is to set out the policy, procedures and additional guidance and advice for the management of educational off-site visits, outdoor learning and all adventurous activities involving children and young people whilst they are in our care and are our responsibility.

These visits and activities often provide exciting and life-enhancing opportunities which are simply not available within the classroom or other settings. They help develop self-esteem and can stimulate social, environmental and emotional development as well as achieving other educational and curriculum aims.

Whilst there can be no doubt as to the benefits gained we must also have regard to the risks involved. It is essential that these activities are carried out with the highest regard for the health, safety and well-being of the children, young people and adults involved.

I am immensely grateful for the invaluable contribution made by all of those planning, leading and supervising visits and activities including those who often do so on a voluntary basis, without which many events would not take place. I hope that this policy, procedures and guidance will help you to continue to provide high quality learning experiences confident that you are following current good practice and keeping children and young people as safe as they should be.

John Anthony
Head of Learning & Achievement



1.2 Scope of the policy

The policy, procedures and guidance apply to all establishments where the Council is the employer.

It applies to all off-site educational visits and all outdoor learning and adventurous activities regardless of location involving children and young people and, where relevant, vulnerable adults. It applies regardless of whether the activities take place within or outside of normal working hours, including weekends and holiday periods.

These visits and activities are defined as events that involve children, young people or vulnerable adults being away from their normal school, centre or residential home premises, whilst in the care of the school or other service. This includes educational visits, outings, school trips and off-site activities such as: local visits to parks, museums, libraries and sports facilities; cultural, educational and recreational and exchange trips; outdoor activities; residential visits and field trips.

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

1.3 Duties and responsibilities of all employees and non-employees

All employees and non-employees involved in the planning, management and leadership of educational visits and outdoor learning must follow the policy, procedures and guidance. Reference must also be made to the “*National guidance for the management of outdoor learning, off-site visits and learning outside the classroom*” <http://oeapng.info> published by the Outdoor Education Advisers’ Panel which is referenced in the policy, procedures and guidance.

In order of precedence all employees and volunteer adults must follow

1. Statutory legislation, regulations and guidance
2. Employer policies, procedures and guidance
3. National guidance for the management of outdoor learning, off-site visits and learning beyond the classroom.
4. Non-statutory advice

A list of these documents is made in Appendix 1: Reference Documents.

Clarification should be sought from the Outdoor Education Adviser should any conflict arise between documents

1.4 Duties and responsibilities of specific employees

National guidance for the management of outdoor learning, off-site visits and learning outside the classroom <http://oeapng.info> sets out the responsibilities and functions of the following key roles;

- Director of Children's Services
 - Director of People's Services in Redcar and Cleveland Borough Council
- Outdoor Education Adviser
- Member of Board of Governors or Management Board
- Headteachers/Managers
- Educational Visits Co-ordinator
- Visit or Activity Leader

In addition to that listed in the National Guidance the following roles have these responsibilities.

1.4.1 Director of People Services

In managing the health and safety of young people and adults on educational off-site visits and outdoor learning the Director of People Services will ensure;

- named staff are provided for guidance and advice
- appropriate training for staff is provided
- qualifications and competence are recorded and staff are approved to lead named adventurous activities
- a framework for risk management including templates and generic risk assessments
- 24/7 emergency response contacts are provided to establishments
- approval for certain types of visits for maintained establishments
- reported accidents, incidents and near misses are reviewed
- establishments arrangements and their visits and activities are monitored
- appropriate constitution of the Educational Visits Approval Panel ensuring a quorum of at least three separate disciplines

1.4.2 Outdoor Education Adviser

The council shall retain the services of an Outdoor Education Adviser who can fulfil the responsibilities and functions of the role in [OEAP National Guidance](#). In order to fulfil the responsibilities of the Director of People Services the Outdoor Education Adviser will;

- provide guidance and advice as required by establishments
- chair the Educational Visits Approval Panel in order to:
 - recommend approval, recommend changes or refuse approval for visits requiring employer approval
 - provide a risk management framework for establishments
 - ensure qualifications are recorded of staff approved to lead adventurous activities
 - review reported accidents, incidents and near misses
 - monitor establishments arrangements and their visits and activities

1.4.3 Governing Bodies or equivalent

In order to discharge their responsibilities governing bodies (or their equivalent) will;

- ensure that their establishment adopts and follows the policy, procedures and guidance
- ensure that the schools has a suitable charging and remissions policy and have oversight of outdoor learning and educational visits to ensure that best value is obtained and financial regulations adhered to.
- Ensure through monitoring that outdoor learning and educational visits comply with statutory and employer guidance with regard to safeguarding.
- monitor provision for pupils with SEN and ensure that the school makes reasonable adjustments to include them in outdoor learning and educational visits and to not treat them less favourably without justification.

1.4.4 Heads of Establishment

In order to discharge their responsibilities heads of establishment will;

- ensure that the policy, procedures and guidance are followed
- appoint (or retain the role of) and Educational Visits Co-ordinator
- ensure that children and young people are suitably and sufficiently supervised and safeguarded
- ensure that financial regulations are adhered to
- ensure that reasonable adjustments are made for pupils with SEN
- ensure that there is a mechanism in place for visit leaders to obtain approval for every visit, series of visits or activities.

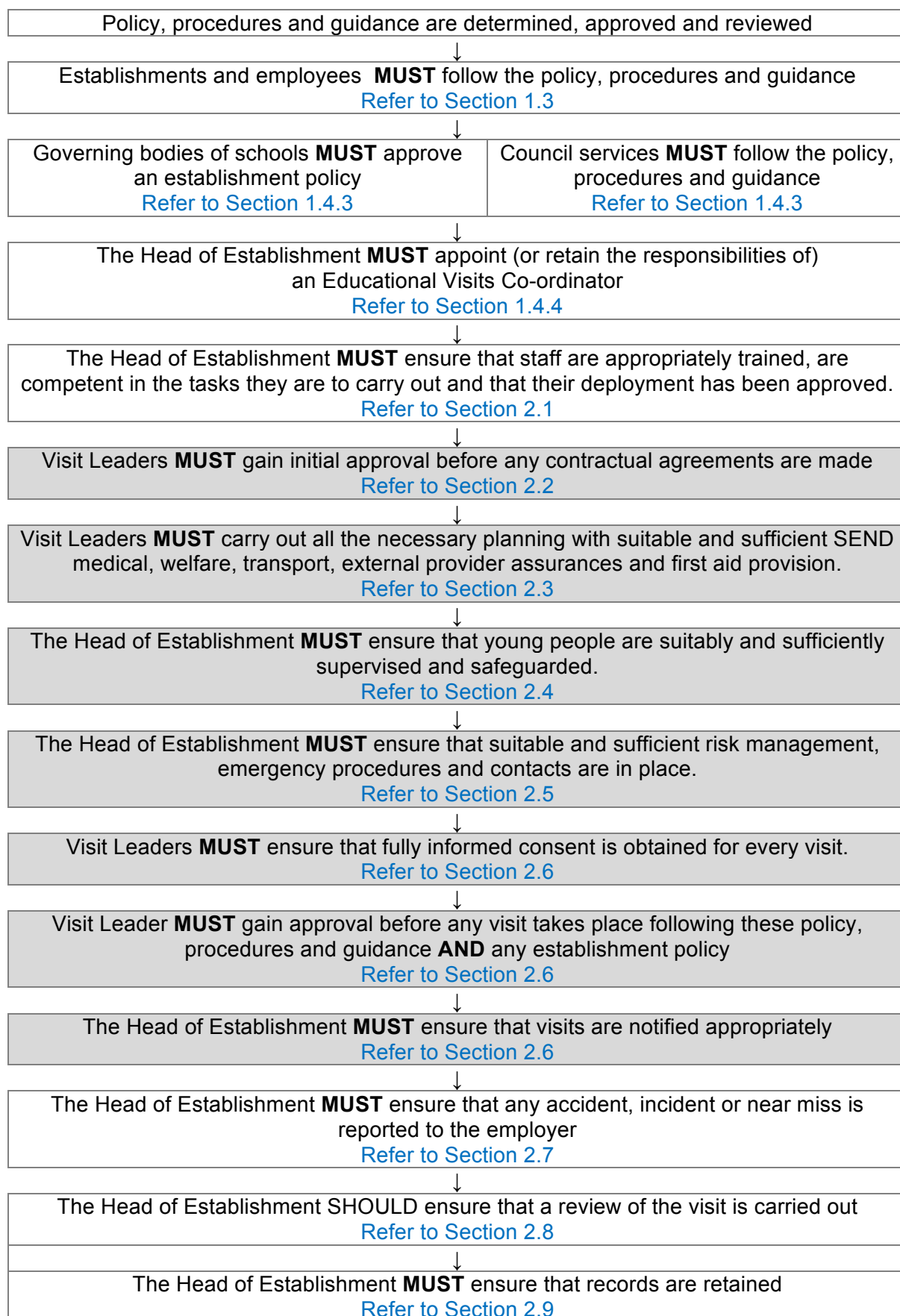
1.4.5 Educational Visits Co-ordinator

Every establishment shall have a nominated person who has undergone initial one-day training as an Educational Visits Co-ordinator. This shall be revalidated every three years with an appropriate council approved revalidation. These training courses shall follow the core messages laid down for the Outdoor Education Advisers' Panel approved Educational Visits Co-ordinator training. The nominated person shall be able to fulfil the responsibilities and functions of the role <http://oeapng.info/downloads/download-info/3-4j-evc-responsibilities/>

1.4.6 Visit and Activity Leaders

The Head of Establishment shall ensure that all members of the visit leadership team are competent and confident to carry out the roles required of them and are able to fulfil the responsibilities and functions of the role <http://oeapng.info/downloads/download-info/3-4k-visit-or-activity-leader/>

2. Procedures



2.1 Trained and competent staff

Staff leading and managing or approving educational visits and outdoor learning must be competent and confident to carry out their role and be approved by their Head of Establishment and their Employer to do so.

2.1.1 Visit Management and Leadership

The following training courses are appropriate for Educational Visits Co-ordinators and Visit Leaders.

Educational Visits Co-ordinator (EVC)

Every establishment operating under this policy and procedures and which carries out educational off-site visits and activities must appoint a trained Educational Visits Co-ordinator. This course is suitable for new to role EVC's. It covers the role and responsibilities of an EVC. An attendance certificate is issued via the Outdoor Education Advisers' Panel. It is a full day course. It requires revalidation every three years.

Educational Visits Co-ordinator Revalidation (EVCR)

This course is suitable for existing EVC's requiring revalidation. An attendance certificate is issued via the Outdoor Education Advisers' Panel. It is a half day course.

Visit Leader (VL)

This course is suitable for staff who have been approved by the Head of Establishment to be Visit Leaders. It covers planning and managing educational off-site visits and activities, and proportional, suitable and sufficient risk management. It involves both theoretical and practical work. An attendance certificate is issued via the Outdoor Education Advisers' Panel. It is a full day course.

Visit Leader Theory (VLT)

This course is the theory element of the Visit Leader training. It covers the theory of planning and managing educational off-site visits and activities, and proportional, suitable and sufficient risk management. An attendance certificate is issued via the Outdoor Education Advisers' Panel. It is a 2 hour course.

2.2.2 Adventurous activities and outdoor learning qualifications

Any person who wishes to lead any adventurous activity or outdoor learning must be able to demonstrate their competence and currency in delivering the activity. No person should lead or teach until they have been approved to do so.

Competence can be evidenced by;

- Holding a relevant qualification,
- Holding an equivalent qualification,
- Having received appropriate in-house training,
- Being competent through experience.

In addition, to maintain the validity of many qualifications and awards the holder must have a current relevant first aid award and a record of continuous professional development in order to demonstrate currency.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.2 Approval before contractual arrangements are made

Visit Leaders must gain approval from the Head of Establishment before any contractual arrangements or any financial commitments are made.

Heads of Establishment must ensure that any overriding contractual arrangements are made between the establishment and an external provider and that suitable checks are made via a Provider Statement.

2.3 Planning and managing visits

Reference should also be made to the relevant parts of National Guidance <http://oeapng.info>

2.3.1 SEND & Inclusion

The Equality Act states that a responsible body must not discriminate against, harass or victimise a young person because of one of the protected characteristics (disability; gender reassignment; pregnancy and maternity; race; religion or belief; sex; sexual orientation), in the way that it affords (or not) the young person access to a benefit, facility or service. There is a duty to make reasonable adjustments.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.3.2 Health & Well-being

As part of the planning process for any off-site visit or activity, the Visit Leader should carefully consider a range of issues which may include:

- the necessary and authorised use of medicines
- the possession, use and consumption of tobacco, alcohol and drugs
- other risk-taking behaviour

Whilst these are issues that may affect some young people the Visit Leader should also recognise, and plan accordingly including the fact that they could also apply to some adults participating in a visit, activity or residential experience.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.3.3 First Aid provision

Immediate appropriate first aid **MUST** be available on every educational off-site visit and activity. In determining an appropriate level of competence, Heads of Establishments, Educational Visits Co-ordinators and Visit Leaders need to take into account, the activity, group, environment and distance from the establishment. Visits involving large numbers of young people may require a number of competent people, especially if smaller sub-groups are independent and remote from each other.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.3.4 Insurance

Establishments must ensure that they have adequate travel insurance in place before any visit or activity commences. This should include checks to ensure that cover is provided for any adventurous or hazardous activities e.g. winter sports (including artificial skiing and snow slopes in the UK)

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.3.5 Finance & charges

The Education Act 1996, sections 449-462 sets out the law on charging for school activities in schools maintained by local authorities in England. The DfE provides guidance to Heads of Establishments and Governing Bodies as to the requirements of a Charging & Remissions Policy, voluntary contributions and what can or cannot be charged for.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.3.6 External providers and preliminary visits

When an establishment is using an external provider for **accommodation** or for **provider led teaching and instruction**, the provider is responsible for the risk management of their provision. Visit Leaders should ensure that a Provider Statement is completed. This is the minimum requirement for obtaining relevant assurances.

The Visit Leader is responsible for managing the risk of any aspects of the visit which they have organised and are leading which includes all non-taught time and travel.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.3.7 Transport

Visit Leaders should ensure that appropriate transport providers are selected and that where staff or volunteers drive that they comply with the establishment and Council guidance on driving.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.4 Supervision and safeguarding

The documents listed below give guidance on effective supervision and safeguarding.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.5 Risk management and emergency planning

2.5.1 Risk Management

Visit Leaders must ensure that appropriate risk management is in place and that control measures are in place to mitigate against risks.

Risk management is about appropriate planning in order to reduce the severity and likelihood of the risk being realised from identified hazards.

It is about identifying significant hazards and risks and ensuring that all staff and young people are made aware as appropriate. In addition it is about ensuring that staff dynamically risk manage throughout a visit or activity and make appropriate on-going decisions.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.5.2 Emergency planning

Heads of Establishment must ensure that appropriate emergency contacts are in place for the duration of any visit or activity and that all those involved are aware of and have access to an appropriate emergency response policy.

Reference should also be made to Section 3: Guidance and Appendix 1: Reference documents

2.6 Consent and fully informing parents, notification and approval

In addition to the overview table below refer to Section 3: Guidance and Appendix 1: Reference documents

Category	Types of visit	Consent and fully informing parents	Record keeping, notification and approval
A	<p>Routine visits and activities which are a normal part of educational provision including but not limited to;</p> <ul style="list-style-type: none"> ▪ Local walks which present no significant risks or technical requirements ▪ Swimming lessons as part of national curriculum provision ▪ Local sports fixtures ▪ Bike ability/cycle training 	<ul style="list-style-type: none"> ▪ On enrolment at the establishment giving details of the types of visits included in this consent and the activities involved. ▪ Medical details from establishment records ▪ Fully informed by whatever means is appropriate to the establishment 	<ul style="list-style-type: none"> ▪ Auditable records kept at the establishment ▪ Notified to the council as a termly record of visits ▪ Approval by Educational Visits Co-ordinator or Head of Establishment according to local policy
B	<p>Non-routine visits which are usually less complex;</p> <ul style="list-style-type: none"> ▪ Sports fixtures beyond the local area ▪ Day visits beyond the vicinity of the establishment involving longer journeys ▪ Visits and activities falling outside the normal hours of the establishment ▪ Non-routine visits or activities which are not part of normal educational provision ▪ Adventurous activities led by an external provider holding an AALA licence ▪ Overnight visits (including camping) on the establishment site 	<ul style="list-style-type: none"> ▪ On each occasion (or series of visits or activities) ▪ Medical details from establishment records OR medical consent form according to the level of hazard ▪ Fully informed on each occasion or series 	<ul style="list-style-type: none"> ▪ Auditable records kept at the establishment ▪ Notified to the council as a termly record of visits ▪ Visit may optionally be notified to the Council in advance ▪ Approval by Educational Visits Co-ordinator or Head of Establishment according to local policy
C	<p>Complex visits including but not limited to;</p> <ul style="list-style-type: none"> ▪ Overnight visits (including camping) away from the establishment site ▪ Visits abroad ▪ Visits in open water or on the sea ▪ Self-led adventurous activities ▪ Adventurous activities led by a provider outside the scope of an AALA licence ▪ High-ropes courses ▪ Motor sports/driving off-road ▪ Flying on any kind of aircraft ▪ Visits near cliffs or steep terrain 	<ul style="list-style-type: none"> ▪ Individual consent and medical information for each visit or activity or series of visits or activities ▪ Fully informed consent prior to each visit or series. 	<ul style="list-style-type: none"> ▪ Auditable records kept at the establishment ▪ Visit notified to the Council in advance ▪ Approval by Educational Visits Co-ordinator or Head of Establishment according to local policy ▪ Approval by the Council

2.7 Accidents, Incidents and near misses

Accidents, incidents and near misses should be reported to the Council.

Accident report forms should be completed and sent within 7 days in order to comply with RIDDOR legislation.

2.8 Reviewing visits

Visit Leaders should review each visit for:

- Educational benefit
- Risk management and any adaptations required either within the establishment or by the Council

In order that performance can be monitored, measured and reviewed

- Every establishment shall complete an annual arrangements and procedures survey
- Every establishment shall notify the Council of visits which take place
- Every establishment shall ensure that a range of in the field monitoring takes place
- The Council shall ensure that a range of in the field monitoring takes place

2.9 Retention of records

Establishments should ensure that records are retained for an appropriate period.

Refer to the Records Management Toolkit for Schools Version 4 - May 2012.

This is available from the Educational Visits Advisory Panel upon request.

3. Guidance

Refer to <http://oeapng.info> for guidance. In addition specific Council guidance will be added as required.

This index will be distributed every six months to ensure that all establishments have a current edition. Additional guidance documents will be distributed to all establishments on publication.

Reference	Title	Date issued

4. Appendix 1: Reference documents

Statutory legislation, regulations and guidance

- Health and Safety at Work Act, 1974
- Management of Health and Safety at Work Regulations, 1999
- Activity Centres (Young Persons' Safety) Act, 1995
- Equality Act, 2010
- Statutory Framework for the Early Years Foundation Stage, 2012
- Keeping Children Safe in Education, DfE, March 2015

Employer policies and guidance

- Corporate Health and Safety Policy
- People Services Health and Safety Policy

National Guidance

- National Guidance for the Management of outdoor learning, off-site visits and learning outside the classroom, OEAP, 2012

Non-statutory advice

- High Quality Outdoor Learning, EOC, 2015
- Nothing Ventured...Balancing risks and benefits in the outdoors, EOC, 2010
- The Handbook for Leaders, 7th Edition, DofE, 2012
- Expedition Guide, 13th Edition, DofE, 2012
- HSE First Aid at Work Guidance
- HSE/AALA Glenridding Beck Case Study
- AALA Inspector Notes : Supervision of DofE
- DfE Advice – Charging for School Activities

Reference should be made to <http://oeapng.info/> in addition to the guidance documents listed.

5. Appendix 1: Forms

Outdoor Learning and Educational Visits forms for completion by establishments as required.

Title	Date issued
OLEV 1: Educational Visits Summary	September 2015
OLEV 2: Application for an educational visit	September 2015
OLEV 3: Parental consent and medical information	September 2015
OLEV 4: External Provider Statement	September 2015