Educational visits and outdoor learning policy

September 2019

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Associated documents:	
Links to:	
• Health and Safety Policy • Premises Management and Estates Dept SLA • Critical Incident and Business Continuity • Equalities policy • Charging and Remissions Policy • Data protection policy	

Approved by the Trust Board, July 2019

Our Vision

We have one core purpose:
To have the biggest positive impact in the varied communities we serve through ensuring top drawer education for our learners. #TransformingLives

How do we ensure this across our trust?
In all we do we are:

1. Ethical to the core, ensuring that education is always front and centre
2. Futures focused system leaders – never simply followers
3. Collaborative in every endeavour
4. Resolutely learner centred

What does this look like across our trust?
Education
We are:

1. Ruthlessly ambitious for all who learn and work with us
2. Unwaveringly inclusive – determined on eradicating barriers to educational success
3. Committed to excellent teaching
4. Determined upon academic excellence for all in our communities
5. Compassionate, ethical and caring advocates for all in our communities
6. Outwardly facing and globally conscious

Operations
We are:

1. Committed to the very best people development and empowerment
2. Determined to shout loudly and share proudly our successes
3. The best professional and technical experts (supporting education) in the sector
4. Committed to the very best understanding and management of risk

Financial
We are:

1. Providing the best possible public service for the best possible value
2. Determined to supplement our public income with shrewd income generation
3. Building financially sustainable models of educational improvement in our communities
4. Demonstrably efficient in all we do

Our values

- We will work inclusively within our communities, embracing the varied localities we serve while sharing our common vision and values.
- We will develop the very best leaders of the future, working to improve education and transform lives.
- We will adhere unwaveringly to the 'Nolan Principles' of Public Service, which is made clear in our commitment to Ethical Leadership.

Contents

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

Introduction

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 '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 leaning 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 has either:

1.3.1 Adopted the ATT Educational Visits and Outdoor Learning Policy and the OEAP National Guidance or

1.3.2 Put in place systems and procedures where the standards are as robust as those required by the OEAP National Guidance

2 Scope and Remit

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

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

2.2 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. Principals may find training for visit leaders can more successfully be delivered to whole staff on training days. This is regularly delivered through our clusters. *Where an employee experiences issues with finding the material they are looking for, or require clarification or further help and guidance, they should contact their establishment's Educational Visits Coordinator (EVC) or nominated Educational Visits/Outdoor Education Advisor.*

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

The relevant Regional Education Director (RED) must be informed of all visits involving adventurous activities; all visits to 'wild country' and Duke of Edinburgh Award expectations, high risk activities and residential visits. These visits must also be approved by Contour Via email or through the Evolve System

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.**

4.4 Non-adventurous activities do not require RED or Contour notification (e.g. visits to any museum, local parks, theatres, theme parks (such as Alton Towers)). The academy EVC should be contacted if a trip leader is unsure.

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 has either:

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

6.2 Academies must have emergency planning procedures in place in the event of a critical incident. 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

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, 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 To be deemed competent, an EVC/Activity Leader/Assistant Leader must be able to demonstrate the ability to operate to the current standards of recognised good practice for that role. All staff helpers must be competent to carry out their defined roles and responsibilities. OEAP National Guidance sets a clear standard to which leaders must work

8.3 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

8.4 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 taken into account

11 Requirement to Ensure Effective Supervision

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, 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 risk management. 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, 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 a E111/EHIC for trips in countries in the EU**

Employees

14.6 ATT operates an Employees Personal Accident Scheme. Cover under this section is provided for all ATT employees and employees, in the course of their employment, providing 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. The Personal Accident Scheme provides cover for all full and part-time employees

Insurance for Pupils

14.7 We only cover accidents to pupils when due to our proven negligence and these claims are covered within our Public Liability Insurance detailed above. Personal Accident Insurance for pupils is not arranged by ATT but may be arranged by a Principal direct; however, there is no statutory requirement for the academy to arrange this cover. The cost of Personal Accident Insurance arranged through academies should be recharged to parents. Parents should be reminded that we do not insure children's belongings

14.8 For journeys/visits overseas, we **insist** that 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

14.9 For all journeys within the United Kingdom, Principals should decide whether or not they require insurance to be arranged, having regard to the nature of the journey and the capabilities of the pupils involved. In all cases, reference should be made to ATT guidelines governing educational visits, before final decisions are made

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

14.11 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 academy 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 academy 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

14.12 It must be remembered that the ATT public liability arrangements apply for all academy organised activities, including visits within the UK and abroad

14.13 Visit and activity leaders should notify insurers via **regional finance teams** to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current

information regarding any special policies that may be available to offer more comprehensive cover. Refer to OEAP National Guidance document: 4.4C Insurance

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.

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 D of E 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, 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 – Trained? Experienced? Competent? Ratios?**
- **Activity characteristics – Specialist? Insurance Issues? Licensable?**
- **Group characteristics – Age? Prior Experience? Ability? Behaviour? Special or Medical Needs?**
- **Environmental conditions – Like Last Time? Impact of Weather? Water Levels?**
- **Distance from support mechanisms in place at the home base – Transport? Residential?**

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 MIS records up to date in our academies)

18.4 It is best 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 academy or cluster level for regular or routine activities. Such policies should be robust and equate to 'local academy 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

18.5 The subject of obtaining consent is a matter for individual academy/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 following information must be recorded and shared with all relevant parties to ensure everyone is aware of who to contact in the event of a critical incident.

First point of contact: Angela Lymbouris Contact number: 01279 306136

For all critical incidents outside of normal academy hours, please contact Edward Thomas, ATT Estates Director on 07867 861783.

Norberto Fusi - EVC Manager Essex
ECC Schools Comms Team +44 (0)333 013 9880 (Office hours 9am - 4pm)
ECC Press Office Urgent media enquiries only +44 (0)7717 867525 (Out of hours)
Educational Visits Team +44 (0)345 646 0397 essexvisits.org.uk

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 and 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 Principal should be obtained before firm bookings are made

20.9 If any of the above three types of visit 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 and RED
- Externally – Final approval by our ED.

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

21 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