



POLICY FOR EDUCATIONAL VISITS, OUTDOOR LEARNING AND ADVENTUROUS ACTIVITIES

TEES VALLEY EDUCATION TRUST

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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) 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 the Trust’s commissioned advisory service Outdoor Education North Yorkshire:
educationalvisits@northyorks.gov.uk
01609 798864

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
- Trustees - 3.4f
- Executive Headteacher (EHT)/Headteacher (HT)/Head of Academy (HoA)/Manager - 3.4g
- Educational Visits Co-ordinator (EVC) – 3.4j
- Visit Leadership Team – 3.4k

2. Establishment policy and procedures

All academies 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.
- Academies must have within this document their management and approval procedures.

The Headteacher has appointed an Educational Visits Co-ordinator. They will have the training and experience to enable them to competently discharge their responsibilities as listed in this policy.

The Educational Visits Co-ordinator is: [\[insert name here\]](#)

Administrative tasks will be carried out by: [\[insert name/s here\]](#)

Consent

This policy makes clear the system for ensuring that parents and carers 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 on educational visits'. 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 academies.

Refer to blanket consent forms that are collected at the beginning of the academic year or use the resources in Evolve. School comms is the preferred method of communication to brief parents/carers.

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 academy head and where appropriate the Trust Board.

Educational Visits Co-ordinator Training

Every academy must appoint a trained EVC. New appointees 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 Head/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 or have demonstrable competence?
- 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 academy 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:

- Part of the Learning Curriculum – an activity that is required to be undertaken by children or young people in order to meet statutory curriculum requirements and is embedded in the curriculum.
- Curricular Enrichment – a valuable educational activity that relates closely to curricular content or an optional experience that promotes social and personal development, or an appreciation of the wider world.

‘Learning Curriculum’ activities can be viewed as educational visits whereas ‘Curricular Enrichment’ 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 Headteacher before any contractual arrangements or financial commitments are made. Academy heads must ensure that any overriding contractual arrangements are made between the academy 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. The academy 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 Teacher prior to embarking on detailed arrangements.

Working with providers

When the academy 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 LOfC 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 academy and whether it is close enough to rely on immediate support from the , 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 academy heads 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
- Section 7 – Specific Types of Visit, Activity & Hazard

Refer to DfE advice www.gov.uk:

- Statutory framework for the early year's foundation stage.

4. Visit Planning and Management System

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

The Evolve system will be used to plan and record the following activities:

- Local, normal, routine educational visits
- 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 Evolve – refer to Evolve for a list of typical activities classed as adventurous for the purposes of this policy.
- Any off-site educational visit, outdoor learning or adventurous activity which is led by a member of Trust staff must be planned and approved through Evolve – refer to Evolve for a list of typical activities classed as adventurous for the purposes of this policy.
- Any residential educational visit should be entered onto Evolve as soon as a booking has been made.
- Adventure activities run on an academy site should also be planned and approved through Evolve – refer to Evolve for a list of typical activities classed as adventurous for the purposes of this policy
- Overseas expeditions require enhanced planning and academies considering this should contact North Yorkshire Educational Visits Advisory Service before booking – preferably at least 18 months prior to the planned event.

5. Incident Management

Academy heads 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. Academies must also ensure they are familiar with the Trust's procedures.

The Visit Leadership team should use the Visit Incident Management Action Plan (see appendix A). The Base Contact should follow the academy emergency action plan.

Staff should undergo training at an appropriate level to ensure that they understand the procedures. Emergency plans should be tested from time to time at both academy level and Trust level.

6. Monitoring of visits and procedures

Academy heads 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 who is responsible for carrying out this monitoring. This may be supplemented by field monitoring by North Yorkshire's Educational Visits Advisory Service.

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 academy heads as to the requirements of a charging & remissions policy, voluntary contributions and what can or cannot be charged for.

<Z:\Policies\Charging and Remissions Policy v3.0 Nov 20.pdf>

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 academy must not discriminate against a young person because of one of the protected characteristics. There is a duty to make reasonable adjustments. Academies 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.

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

10. Insurance

Travel/Journey Insurance

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

Public Liability and Employer's Liability

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

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 academies must follow any specialist guidance provided by the Trust.

Cars

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures. Any staff using their car for work must have business insurance on their policy.

Coaches

Academies 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.

Other Resources and Supporting Documentation

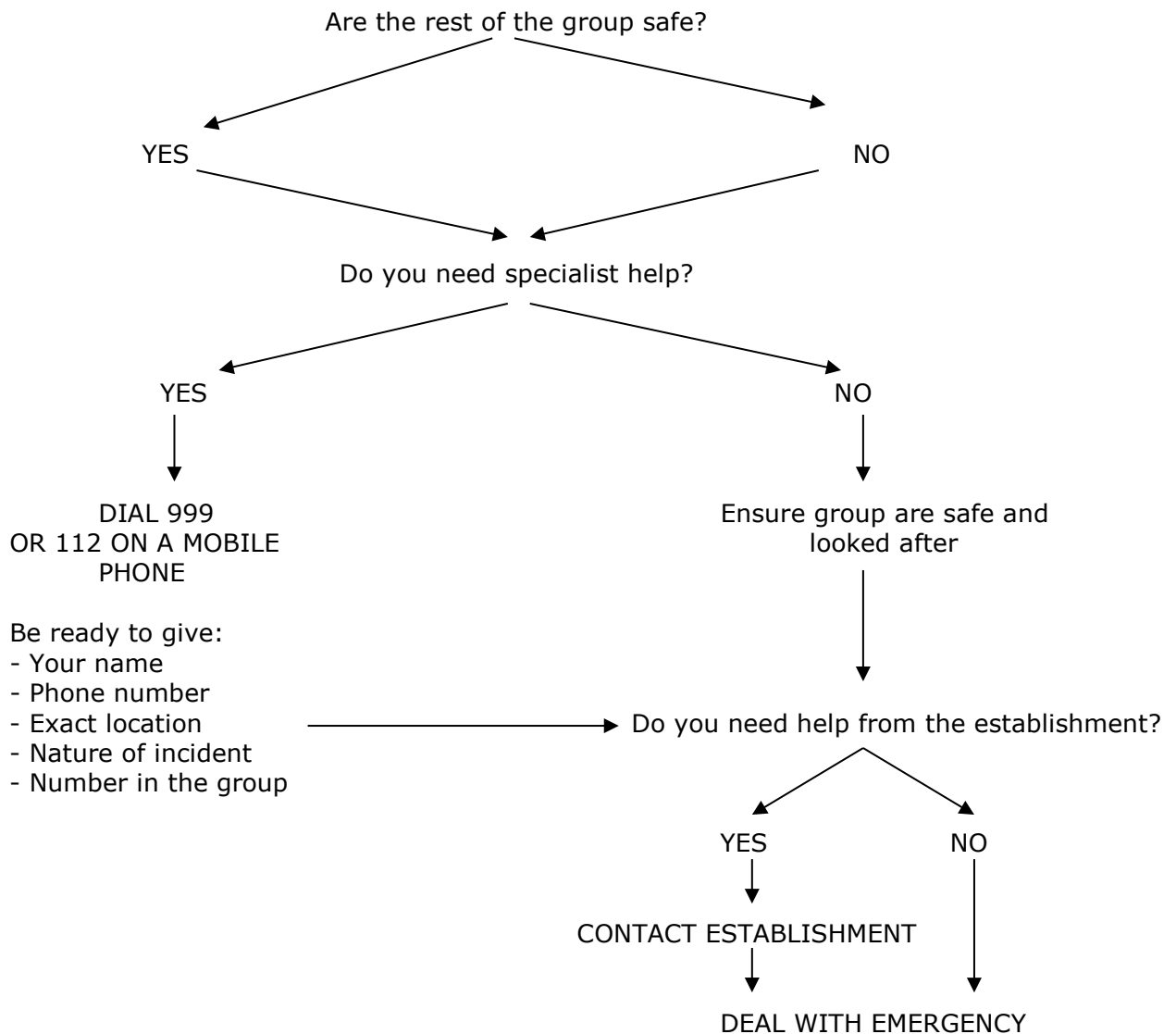
- [Guidance Documents | \(oeapng.info\)](#)
- <https://oeapng.info/downloads/all-documents/>
- <https://www.gov.uk/government/publications/driving-school-minibuses-advice-for-schools-and-local-authorities>
- [Discovery Special Academy Minibus Policy and work related road safety policy](#)
- <https://www.gov.uk/government/publications/charging-for-school-activities>
- <https://www.gov.uk/government/publications/early-years-foundation-stage-framework--2>

Appendix A

Tees Valley Education Visit Incident Management Action Plan

STOP! THINK! ACT! KEEP CALM – Let the group know that you are in control.

Establish the nature and extent of the emergency:



- Administer first aid
- Ensure that a member of staff accompanies any casualty to hospital and that the rest of the group are supervised at all times and kept together.
- Identify who the nominated establishment contact is – this should be the **Head Teacher**, but in their absence it will be another member of the SLT.
- Write down as many relevant facts as possible, witness details, preserve vital evidence.
- Keep written accounts of all events, times and contacts after the incident.
- Do not let anyone in the group talk to the media, do not give any names. Refer all media communication to **head office**, 01642 221156.
- No one in the group is to discuss legal liability with other parties.
- Complete an accident report form as soon as possible.

Appendix B Planning a Trip Flow Chart

Identify

- Where do you want to go?
- Identify date (check the academy calendar, including availability of academy minibus if using)
- What are the objectives?
- Which pupils are taking part?
- Who is going to be part of the organising team?
- Which staff / first aiders are attending?

Plan

- Fully complete an educational visit form (Giving at least 4 weeks notice)
- Hand in to office to get transport quotes (if not using academy minibus)
- Once full visit costings have been completed, office staff/teacher will hand the trip form to our Education Visit Coordinator for approval
- The Senior SLT/EVC will then hand to the Headteacher/Head of Academy for final approval

Deliver

- Once final approval has been granted, you will be informed and any bookings will be made through the office
- Once final approval has been granted, start to add to Evolve including risk assessments and health & safety considerations
- Visit lead submit on Evolve once all sections are completed and signed risk assessments attached
- If there are any changes to staffing, dates, venues etc, after approval, your visit will be paused and reviewed again. **You must inform the EVC of any changes immediately.**
- Admin team will add the trip to Schoolcomms/SIMS calendar/process trip letter and will inform parents and yourself of the visit details
- Admin team to chase outstanding consent/payments regularly

Trip

- Ensure you have a register, with any medical needs and emergency contact details with you at all times
- All volunteers to sign risk assessment
- Take risk assessment documents and any medical/other H & S requirements depending on the type of trip
- Take First Aid kit / school packed lunches / hi vis vests if required
- Number to ring Office/out of hours contact should you need any contact numbers or advice and academy mobile phone if using

Appendix C Planning a Trip Flow Chart

Educational Visits Approval Request Form

Visit Leader: _____ THIS PERSON MUST COMPLETE EVOLVE Deputy Lead: _____

Class/year group: _____ Proposed date of visit: _____

Destination: _____

Duration of visit and timings: _____

Joint visit with WPA Yes/No

Curriculum/learning intention and purpose of proposed visit:

| | | |
|--|---|--|
| Adult / pupil numbers <i>recommended ratios:</i> EYFS 1:6 KS1 1:12 KS2 1:16 Residential 1:10 | Total number of pupils: | Total number of adults: Adult names: First aider name: |
| Pupil additional requirements | Do any children on the visit require medication/inhaler? Is there a member of staff trained to administer medication on the visit? Do any children require additional support? If yes please identify the support needed | Yes/No Name: Yes/No Names of children: |
| Cost information | Venue Transport Wheelchair? Cost for Parents | Venue cost - £ Transport cost - £ £ |
| Lunch arrangements Cook informed Yes/No | Packed lunches required? Other arrangements – e.g. early/late lunch | |

Please submit form to Senior Leader/Education Visits Coordinator for approval.

EVC signature: _____ Date: _____

Head Teacher signature: _____ Date: _____

Following review EVC to inform visit lead of outcome and Evolve instructions.

FOR OFFICE USE:

| | | | |
|--------------|------------------|--------------|-----------------|
| Venue Booked | Transport Booked | School Comms | School Calendar |
| | | | |

Educational Visits Co-ordinator:

Visit planning approval summary table for Tees Valley Education

| | Planning/Recording Process | Checked by | Risk Management | Final Approval |
|---|---|------------|---|---|
| On-site/Local Learning Area (LLA) - walking/inter-academy | Permissions covered at beginning of academic year | | Risk assessment required. | Headteacher pre-approves trip. EVC approves on evolve. |
| Day/half day visit outside Local Learning Area – 2 weeks | Recorded on Evolve by visit leader | | Risk assessment required from Visit Leader and reviewed by the Educations Visits Co-ordinator for initial review | VL to upload to evolve. |
| Overseas – 18 months | Pre-approval by CEO/Trust Board. Recorded on Evolve via the overseas section | | Risk assessment required. Ensure Visit Leader reads overseas travel guidance and RPA travel guidance documentation on travel advice tab in resources section of Evolve. | Trust Board (Following advice from NYCC adviser) |
| Residential – 6 weeks | Pre-approval by Headteacher. Recorded on Evolve | | Risk assessment required | Headteacher (Trust Board if a new residential not previously visited) |
| Adventure, provider led – 4 weeks | Recorded on Evolve by visit leader | | Provider manages the risk of activities and academy manages the risks of the journey and non-provider led activities using LLA risk management supplemented by specific documentation where necessary | Headteacher (Following advice from NYCC adviser) |
| Adventure, self-led – 4 weeks | Recorded on Evolve by visit leader | | Local Learning Policy/Specific risk assessment for purpose of activities | Head Teacher (Following advice from NYCC adviser) |