

# POLICY FOR THE MANAGEMENT OF Educational Visits



## Introduction & Scope

Swansfield Park Primary School (the Employer) recognises Educational visits, outdoor learning and adventurous activities (generically referred to as “offsite visits” hereafter) are a key to broadening the horizons and providing valuable cultural experiences that improve the physical and mental wellbeing of young people.

Risk is a natural part of everyday life; all activities involve risk and it is impossible to eliminate it entirely. Indeed, the human spirit thrives on adventure and journeys into new territory, both physical and metaphorical. As they grow up, it is important that children and young people learn to understand and manage risk and uncertainty for themselves. If society attempts to overprotect them, they not only miss huge opportunities for growth but also emerge into the world at large unable to cope with the uncertainties and challenges of adult life. Well-managed off-site visits play a vital part in helping children and young people learn about the real world, enabling them to understand and manage risks for themselves.

The aim of this policy is to ensure that the duty of care and the safeguarding of pupils are always fulfilled whilst they are undertaking offsite visits. This responsibility also extends to the members of staff and others involved in supervising outdoor activities. It applies where those acting in the course of their employment take responsibility for children, young people or vulnerable adults participating in off-site visits. This may be either directly or indirectly through third party provision.

### Introduction & Scope

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This policy is written with the purpose of supporting those undertaking offsite visits to help them to ensure that all such events to be properly planned, managed and approved. It sets out specific guidance that is supplementary to the Northumberland County Council Health and Safety Code of Practice Offsite Educational Visits, Outdoor Learning and Adventurous Activities (available within the Resources section of the [Evolve](#) system).

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## Legal Framework

Ensuring the health and safety of pupils and staff involved with offsite visits is a responsibility of Northumberland County Council (and of other employers engaging the services of the Corporate Health and Safety Team to support them).

This responsibility arises from the Health and Safety at Work etc. Act 1974 and subordinate legislation that requires employers to:

- Ensure the health, safety and welfare of employees and others who may be affected so far as is reasonably practicable
- Assess the significant risks associated with activities
- Introduce sufficient measures to control those risks
- Inform their employees about the measures

In addition, employees must:

- take responsibility for their own and others' safety
- co-operate with their employers over safety matters
- carry out activities in accordance with training and instructions
- inform the employer of any serious risks

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## Duty of Care

Where a non-specialist or non-professional adult takes on responsibility for the supervision of young people, the legal expectation of the standard of care is to **'take reasonable care'**. Originally, the standard of care expected of staff was described as being in loco parentis: in place of a prudent parent.

When the adult taking on the duty of care has a particular expertise or specialist knowledge, then the law may expect a higher standard of care – that of the **'reasonable professional'**.



For an employer the standard is somewhat higher, as they are required to have safety management systems in place to **‘ensure as far as is reasonably practicable’** that people are not harmed by their activities. Those establishments which undertake the care, supervision or control of vulnerable people (including children) have, in certain circumstances, a non-delegable duty of care and so are not merely required to ‘take reasonable care’ of those in their charge but to ensure ‘that reasonable care is taken’.

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## Ensuring Understanding

Swansfield Park Primary School is required to ensure that its employees are provided with suitable systems, appropriate guidance and access to competent advice and training. To assist all in understanding their responsibilities, the following is provided.

**Suitable systems** by means of access to the **Evolve** system which is managed by Northumberland County Council.

**Appropriate guidance** encapsulated by the Northumberland County Council Health and Safety Code of Practice Offsite Educational Visits, Outdoor Learning and Adventurous Activities and Outdoor Education Advisers Panel National Guidance (OEAP NG).

**Competent advice** in respect of risk management is obtained primarily from the Educational Visit Coordinator (EVC) and from Northumberland County Council’s Health and Safety Adviser (Educational Visits) who is based within the **Council’s Corporate Health and Safety Team**.

Training is accessed by:

- The nominated EVC attends the mandatory 6-hour OEAP EVC Training course.
- The nominated EVC attends EVC Refresher training at 3-year intervals.
- Visit Leaders undertake Visit Leader Training and accesses updates via their EVC.

A copy of this policy and associated procedures of the establishment must be made available to all staff within the establishment who are responsible for leading off-site visits. Any parent requesting a copy should be furnished with one.



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## Outdoor Education Adviser's Panel: National Guidance

Swansfield Park Primary School refers to 'National Guidance' (OEAP NG), as a source of good practice and guidance. It is invaluable and provides detailed information covering off-site visits.

All staff planning to undertake off site visits, must demonstrate that they are complying with National Guidance, the NCC Code of Practice and this policy. Where there is a departure from these, the Visit Leader is to consult their Educational Visits Coordinator (EVC) or Head prior to the visit. Any agreed variation must be justified by a suitable and sufficient risk assessment and outlined within visit planning.

It is a legal expectation that employees must work within their employer's guidance; therefore, employees must follow the requirements of "OEAP NG", as well as the requirements of this Policy. If information in this policy is at variance to the advice in OEAP NG, the advice in this policy should be followed.

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## Roles and Responsibilities

The roles and responsibilities of the various interested parties are dealt with individually below.

### Head or Designated Senior Manager

This role will be fulfilled by **Jenny Smith**

The Headteacher will:

- ensure that an **Evolve** visit form is completed for all offsite activities
- ensure that risks have been assessed, significant risks recorded and any appropriate safety arrangements are in place that a risk proportionate
- ensure all visits and off-site activities have specific and appropriate educational objectives
- approve all visits and activities in line with County Council's current Code of Practice
- ensure off-site programmes are led by competent staff who are appropriately experienced to assess the risks, manage the activity and manage the specific group
- verify that the level of supervision is suitable for each visit



- ensure visit leaders have access to planning resources such as a planning checklist, event specific plan, OEAP National Guidance, and adapted as necessary to meet the particular needs of the establishment
- bring significant issues to the attention of the Governors at meetings or via a formal report

### **Educational Visits Co-ordinator (EVC)**

This role will be fulfilled by **Charlotte Murdy**

An EVC is required to facilitate the transference of all visit forms via the Evolve system from visit leaders to the Head for approval or authorisation. They will support the role of the Head by applying the policy and procedures set out here and within the Northumberland County Council Health and Safety Code of Practice Offsite Educational Visits, Outdoor Learning and Adventurous Activities.

To undertake the role of EVC, the Headteacher may delegate the task to a suitably experienced and competent member of staff. However, the Headteacher will be considered the EVC where no member of staff has been chosen.

In order to carry out the specific tasks required of the EVC the person chosen must attend an initial training course and refresher training on a three-yearly basis.

### **Visit Leader**

This role will be fulfilled by various members of staff deemed competent by the Head and will be identified within the Evolve forms.

The visit leader will:

- have overall responsibility for the supervision and conduct of the visit or activity
- obtain the Headteacher's approval before any off-site visit or activity takes place
- follow policy and procedures of the Council and the establishment
- assess the risks involved and amend, as appropriate, any previously recorded risk assessment
- use the 'visit planning checklist' to ensure all procedures have been followed
- ensure that the correct checks on the external 'Provider' have been made



- inform parents fully about the visit and gain their consent, where appropriate
- reassess risks while the visit or activity takes place
- ensure there is a contingency plan (Plan B) should a significant change to the programme be necessary due to inclement weather or other adverse events

### Other members of staff

Members of staff, volunteers and parent helpers should:

- assist the visit leader to ensure the health, safety and welfare of young people on the visit
- be clear about their roles and responsibilities whilst taking part in a visit or activity
- support the local safeguarding policy including undertaking DBS checks where required.

### Parents

Parents have an important role in deciding whether any visit or off-site activity is suitable for their child. Subject to their agreement to the activity parents should:

- support the application of any agreed code of conduct
- inform the party leader about any medical, psychological or physical condition relevant to the visit
- provide an emergency contact number
- sign the consent form having received a letter outlining the visit proposals which gives the parent sufficient information to give informed consent

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## Planning an offsite visit

The processes and procedures to be followed when organising a visit are embedded in the Evolve system. The EVC manages access to the system.

An initial dialogue should take place with the EVC prior to planning an offsite visit.

Whatever the destination, it is of critical importance that formal planning is undertaken to consider the potential dangers and difficulties associated with the visit and that appropriate plans are in place to reduce the risks.



For further guidance on planning refer to:

<p><b>NCC Visit Planning Checklist</b>        May be accessed via Evolve &gt; Resources (pink tab) &gt; Forms (grey sub-tab)</p>	<p>MUST be used for all Cat. 2 and UK 'Residential' Cat1 visits - designed to assist planning and preparation by Visit Leader, EVCs and Heads.</p>
<p><b>OEAP NG Visit Leader Guidance</b>        Information contained within the OEAP National Guidance website.</p>	<p>The OEAP documents give essential guidance for Visit Leaders relating to the role and responsibilities.</p>

## Parent/Carer Consent

It is not a requirement to obtain consent from parent/carers for pupils to participate in off-site activities that take place during establishment hours and which are a normal part of a child's education, such as local studies and visits to a museum or library etc.

Whilst this position is defined by section 29 of the Education Act 2002 and is adopted by this policy, parents/carers are to be informed of such activities.

Consent is required for visits outside normal establishment hours and for activities that may be perceived to be higher risk, for example adventurous activities. This should be supplemented by more detailed information regarding the visit or activity so that parents/carers can give 'informed consent'.

Consent for such activities may be obtained via a 'blanket consent', which could be sent home at the start of each year. However, it is seen as good practice for this to be reinforced by ongoing communication and notification.

Further to the above and subject to their agreement (implied or otherwise) parents/carers should be invited to:

- support any agreed code of conduct
- inform the party leader about any relevant medical, psychological or physical condition
- provide an emergency contact details
- where applicable sign the consent form having received a letter outlining the visit proposals which gives the parent sufficient information to give informed consent

## Using External Providers and Facilities

The decision relating to the use of an external provider is the responsibility of the Visit Leader, the EVC, and the Head or designated Senior Manager.

When planning a visit using external providers and/or facilities Visit Leaders are encouraged to refer to OEAP Guidance 4.4h: 'Using External Providers and Facilities' for further information.

An external provider and a facility are defined in the table below:

<b>Provider</b>	Any third party contracted to organise and/or deliver all or part of a visit or activity and may include support with supervision.	Example: <ul style="list-style-type: none"> <li>• Outdoor Activity Centre</li> <li>• Specialist Instructor e.g. Kayak or DofE Supervisor</li> </ul>
<b>Facility</b>	A venue or resource open to the public, which will form part of a visit but where the leadership team will lead and deliver any activities and the venue does not provide teaching or instruction.	Example: <ul style="list-style-type: none"> <li>• Museums, galleries</li> <li>• Theme parks</li> <li>• Theatres</li> <li>• Industrial site</li> </ul>

Visit Leaders must assure themselves that the 'Provider' they intend to use has appropriate safe systems in place to deliver the proposed activity. This is to be done by either of the following:

- First, check that the 'Provider' holds a 'Learning Outside the Classroom Quality Badge' (LOtC).  
*(The LOtC Quality Badge provides sufficient reassurance that the Provider meets nationally required minimum standards of safety and quality).*
- Details of a Provider's status can be checked on the Quality Badge website at: [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) or sometimes it will automatically show when you select a 'Provider' using the Kaddi system on Evolve. Where a Provider holds this Quality Badge, the completion of a 'Provider' form is not required. However, if they do not hold this status:-
- Ask the 'Provider' to complete, sign and return the 'Provider Statement' form (copies of this document can be found by logging onto Evolve, go to the Resources tab > click the pink tile (View, Guidance, Policies and Information) > Forms > Provider Statement.

Visit Leaders are advised to review the 'Provider' form to ensure it is satisfactorily completed. It is recommended that these forms are renewed on an annual basis for each Provider, or where there is a significant change affecting the basis of the original completion.



Provider forms completed for another establishment may not be used.

If a Provider holds an AALA licence (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

If the Provider has made alterations to the wording of the Provider Form or is unable to comply, then you must discuss this with the Provider, and if necessary seek advice from the Corporate Health and Safety Team prior to making a commitment with the Provider.

The satisfactory completion of the Provider Statement does not necessarily signify that the service on offer will be appropriate for the children or young people from your establishment. A pre-visit and recommendation from previous users are advised to help you decide on its suitability.

The above procedure is not sufficient for Overseas Expeditions (ie. those which typically take place in remote areas of the world and/or in developing countries). For advice and guidance please contact the from the Corporate Health and Safety Team prior to making a commitment with the Provider.



## Categorisation of Off-site Activities

The Headteacher is responsible for off-site activities and approving the competence of the visit leaders to lead each visit or off-site activity. An [Evolve](#) visit form must be completed for all offsite activities. Visits are to be categorised according to the level of risk associated and the following.

	Category 0	Category 1	Category 2
Evolve system module *	“Evolve Local Area Visit”	“Evolve Visit Form”	“Evolve Visit Form”
Risk level	<p><b>Local area/simple</b></p> <p>Either:</p> <p>a) “Simple Visits”, no more than everyday level of risk, requires little extra planning beyond educational aspects, are covered by existing risk assessments, does not involve an external provider or facility and not included within a Category 2 visit (Upper Tier Risk) **, (e.g. visits to local shops, walk to local amenity green spaces)</p> <p>or,</p> <p>b) To an area formally designated as a “Local Learning Area” in formal policy, covered by existing risk assessments, not included within a Category 2 visit (Upper Tier Risk) ** and agreed with NCC’s Corporate Health and Safety Team (e.g. routine curriculum swimming, Beach/Forest Schools to a designated local site).</p>	<p><b>Lower risk visits</b> that are defined as Category 1 in a written policy</p> <p>Examples such as:</p> <ul style="list-style-type: none"> <li>• UK residential visits which have no elements of ‘Adventurous Activities’</li> <li>• visits to a library, museum, etc.</li> <li>• physical education activities at a sports centre</li> <li>• use of play parks and recreational areas</li> <li>• shopping trips</li> </ul>	<p><b>Higher risk visits **</b>, defined as:</p> <ul style="list-style-type: none"> <li>• visits which include adventurous activities</li> <li>• visits to remote and/or hazardous locations such as visits to industrial site/ recycling centres</li> <li>• day visits outside the UK</li> <li>• residential visits abroad including exchange visits</li> </ul>

\* Module within the Evolve to be used when planning the visit concerned

\*\* See Appendix 1 of Northumberland County Council Health and Safety Code of Practice Offsite Educational Visits, Outdoor Learning and Adventurous Activities (available within the Resources section of the [Evolve](#) system).

**Category 0** visits must be formally risk assessed in accordance with Northumberland County Council Policy [E6 – Risk Assessment](#) on the [Risk Assessment form \(RA 1\)](#). Approval must be obtained as set out below.

**Category 1 and category 2** visits must include a visit programme, Event Specific Plan (ESP) and Evidence of consent.

## Approval of Off-site Visits

**Local Learning Area/Simple Category 0 Visits** will all be approved by the Head or a designated Senior Manager (Head level) in the context of the applicable risk assessment arrangements. This approval is made at a strategic level and is not made through the Evolve system. Individual category 0 visit forms will be approved by the EVC for every visit.

The Head level approval will ensure relevant organisational arrangements are made and designated in this policy with controls measures are set out within risk assessment. The Head or designated Senior Manager is responsible for ensuring the risk assessment is reviewed either at the commencement of each academic year or where circumstances change (e.g. change of provider, new pupils in the group or in response to an accident, incident or near miss event). The EVC is responsible for supporting the Head or designated Senior Manager in meeting these responsibilities.

The Head or designated Senior Manager, with the support of the EVC will ensure proposed Local Learning Areas area agreed with the Corporate Health and Safety Team and that the areas are formally designated in this policy.

The Head or designated Senior Manager with the support of the EVC will ensure relevant staff are properly consulted and adequately briefed on the arrangements set out within the risk assessments that are to be applied for the visit.

Visit Leaders will complete and submit the **“Evolve Local Learning Area form”** to the EVC who will conduct a simple check to ensure adequate information is provided. A copy of the applicable risk assessment will be added to the form for record keeping purposes by the EVC when adding approval. The visit will then be able to proceed as planned.

**All category 1 and category 2** visit forms will be submitted via the Evolve **“Visit Form”** module. The Head or designated Senior Manager is responsible, with the support of the EVC for approving all category 1 and 2 off-site activities. This includes approving the competence of the visit leaders to lead each visit or off-site activity.

A fully completed Evolve visit form, which includes a visit programme, event specific plan (ESP) and consent letter to parents, must be forwarded to the Health and Safety Adviser (Outdoor Education) for approval for the following visit types:

- hazardous outdoor and adventurous activities



- residential visits in the UK which contain an adventurous activity element
- visits abroad
- activities where there is significant concern about health, safety and welfare such as field studies, beach or forest schools and visits to industrial sites

The Headteacher will monitor off-site visits and activities and will provide a regular report to the Governing Body about the off-site activities which have taken place.

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## Timescales for Approval

The notification period for category 0 and category 1 visits are specified by Head or designated Senior Manager.

Category	Requirement Time for Notification & Approval	Level of Approval Applied
Category 0 (Local Area/Simple Visits)	3 days	EVC
Category 1 (Lower risk)	7 days	Head / Designated Senior Manager
Category 2 (Higher risk/Adventurous)	28 days <i>Note: 12 months advance notification for certain overseas visits.</i>	Head and Local Authority Health and Safety Adviser

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## Designated Local Learning Areas

The establishment has reviewed designated its “Local Learning Areas” and these are as follows:

- Willowburn Sports and Leisure Centre, Alnwick

Category 0 visits to areas not listed above or those that do not fall within the designation of “simple” visit will not be approved through the Evolve Local Area Visit module. They should be submitted via the “Evolve Visit Form” module.

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## Training and Competence

To be deemed competent, a Visit/Activity Leader, or Assistant Leader must be able to demonstrate the **ability to operate to the current standards of recognised good practice for that role.**



The leadership and supervision team, including any volunteers must be competent to carry out their defined roles and responsibilities.

OEAP National Guidance sets a clear standard to leaders must work. The guidance states: **“a competent Visit /Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:**

- **Knowledge and understanding of their employer’s guidance supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. OVC Training, Visit Leader Training. Such training may be a requirement prescribed by some employers**
- **Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment**
- Knowledge and understanding of the group, the staff, the activity and the venue
- Appropriate experience
- **In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification”**

All leaders and supporting staff 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.

The establishment will give note to those staff who are leading Adventurous Activities. Those staff undertaking such a role are required to submit a Leader Approval Request (LAR) via the Evolve system in advance of the visit.

Where a Volunteer is a parent (or otherwise in a close relationship with 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 event Specific Plan.

Further guidance on the Assessment of Competence is provided by OEAP NG, **Approval of Leaders.**

The Head or EVC will maintain or encourage staff to upload copies of their outdoor qualifications (including first aid) to their EVOLVE account. The qualifications of volunteers involved in outdoor activities (including those



for first aid, life-saving, minibus driving and undertaking specific hazardous activities) must also be added to their accounts. (However, in order to do this the Volunteer must be added as a member of staff with a '(V)' attached at the end of their surname).

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## Accidents and Incidents

Any accidents and/or incidents that occur during off-site visits and activities will be reported and recorded in accordance with the Northumberland County Council's accident reporting procedures.

[These maybe accessed by clicking here.](#)

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## Emergencies

The Headteacher or designated Senior Manager will ensure that emergency arrangements are in place, are known to staff and comply with Northumberland County Council Health and Safety Code of Practice Offsite Educational Visits, Outdoor Learning and Adventurous Activities.

All staff involved in a visit must be aware of and adhere to their establishment's policy on emergency procedures for local visits and implement the Local Authority's policy for other types of visit.

As part of the planning and preparation for all Category 2 visits, two home based emergency contacts must be identified both on the 'Visit' and 'Serious Incident Guidance' forms. A minimum of two contact telephone numbers for designated senior members of staff or members of the governing body must be included.

Completed 'Serious Incident Guidance' forms must be held by the Visit Leader, supervising staff and the home-based emergency contacts at all times. Copies of the blank document can be found in [Evolve: Evolve > Resources \(pink tab\) > Forms \(grey sub-tab\)](#).



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## Monitoring and Review

Monitoring and review is an invaluable part of risk management as it facilitates learning and improvement of arrangements and control measures. The organisations conducts monitoring both actively and reactively.

Active Monitoring and review will be facilitated at an operational level by:

- In field observations
- Completion of Evolve form evaluations
- Post-visit briefings conducted by the Visit Leader

Active Monitoring and review will be facilitated at strategic managerial level by:

- Continual monitoring by the EVC of Evolve forms at point of approval, review of Evolve form evaluations and feedback from in field observations
- Termly visit report generated by Evolve that is reviewed by Senior Management team
- Policy review by governors every 2 years or at such time as there are significant changes to guidance on the management of educational visits and off-site activities

Reactive monitoring is conducted through the process of providing feedback following visit activity and the reporting and incidents as noted above.

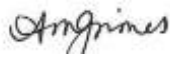


This policy has been formally adopted by the governing body.

**VERSION HISTORY**

VERSION	DATE	DESCRIPTION
Initially adopted	4 September 2017	Adapted into Swansfield Park Primary School
Review	28 December 2019	Minor Amends
This Review	14 September 2024	Review

**APPROVAL AND AUTHORISATION**

	NAME	JOB TITLE	SIGNATURE	DATE
Approved	Anne-Marie Grimes	Head Teacher		September 2024
Approved	Angela Jefferies	Chair of Governors		September 2024
<b>DATE OF NEXT REVIEW</b>			<b>Autumn 2026</b>	







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