



# **Pennine Academies Yorkshire**

## **Educational Visits Policy**

## POLICY HISTORY

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## KEY AMENDMENTS TO THIS POLICY

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## 1. INTRODUCTION

Pennine Academies Yorkshire 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.

The DfE Guidance - Health and safety on educational visits published 26 November 2018 suggests that schools and education visit coordinators take advice and guidance from the Outdoor Education Advisers' Panel (OEAP) when undertaking adventure specialist activities.

“National guidance for the management of outdoor learning, off-site visits and learning outside the classroom” ([www.oeapng.info](http://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'.

The Chief Executive Officer has legal responsibility for educational visits. Support and guidance within the Trust is offered for this policy by the School Improvement Director.

Support, training and access to further guidance can be obtained from Bradford Council's Outdoor Education Service.

Outdoor Education Advisor     [outdooreducation@bradford.gov.uk](mailto:outdooreducation@bradford.gov.uk)     01274 439600

## 2. SCOPE & 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 the normal school hours, including weekends and holiday periods.

It does not apply to work-experience placements. Contact the Xperience team for further information relating to these types of placements ([xperience@bradford.gov.uk](mailto:xperience@bradford.gov.uk)).

### 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 Advisors' Panel (OEAP) National Guidance sets out the responsibilities and functions of the following key roles (for reference [www.oeapng.info](http://www.oeapng.info)) :

● **Employer (PAY Trust)**

Employers are legally responsible for the activities that take place in their establishments. This includes a common law duty of care towards their employees and participants in the activities, and duties under the Health and Safety at Work Act (1974) (HSWA) and other legislation. See OEAP National Guidance document 3.2a "Underpinning Legal Framework and Duty of Care". Employers must ensure that their employees are provided with appropriate guidance. This can be done by formally adopting OEAP National Guidance ([www.oeapng.info](http://www.oeapng.info)) as part of a policy for outdoor learning and off-site visits which also includes details of any specific local requirements. Training must be provided to support the guidance, and to ensure that it is understood. It is recommended that:

- Educational Visit Coordinators (EVCs) should undertake EVC Training, followed by revalidation training at least every **three years**, delivered by a trained OEAP EVC trainer;
  - Visit Leaders should undertake Visit Leader Training, with regular update training, delivered by an Outdoor Education Adviser or experienced EVC.
- Employers should ensure that their training requirements are made clear to their establishments. Further advice and access to information to support the training should be made available from an appointed adviser or team of advisers. They should have proven expertise and professional understanding of the guidance, the training and current good practice. Details of the role of Outdoor Education Adviser are set out below.

● **Outdoor Education Advisor (Bradford LA - EVOLVE)**

Outdoor learning and off-site visits can have a profound effect on children and young people and their well-being, positively influencing behaviour and relationships, developing self-confidence, and raising achievement. In an educational setting, 'real' experiences make learning more engaging, relevant, enjoyable and memorable and should be integral to the establishment's work. The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer. All employers have a duty to ensure, so far as is reasonably practicable, the health, safety and welfare of all employees and others who may be harmed by their activities. The Management of Health and Safety at Work Regulations 1999 require employers to appoint competent persons to assist them in meeting these responsibilities. It is therefore good practice for an employer that provides outdoor learning or off-site visits to appoint a competent Outdoor Education Adviser (or equivalent) - EVOLVE.

Although this guidance describes the functions of an Outdoor Education Adviser being carried out by one person, an employer may decide to delegate the various responsibilities to different roles. If this is the case, it is essential that there is good communication and coordination between them. The remit of the Outdoor Education Adviser should extend across the whole range of the employer's provision so that appropriate guidance and support systems are available to those responsible for all areas of its provision. In appointing an Outdoor Education Adviser, the employer should ensure that the adviser has sufficient knowledge, training, experience, sound judgement, and the ability to influence

practice across the organisation effectively. Employers should carry out checks to verify these.

The adviser should have:

- Sufficient knowledge of the legal responsibilities and powers of the employer (and the local authority if this is relevant) to ensure these are correctly applied in their area of work;
- Experience of leading/managing a broad range of outdoor learning activities and off-site visits;
- Understanding of the contribution that outdoor learning and off-site visits can make to learning and development, and to fulfilling the aims and ethos of establishments (where the employer is responsible for schools or colleges, this should include knowledge of the ways in which outdoor learning and off-site visits can be integrated into the curriculum and into teaching and learning);
- A practical understanding of the issues involved in the supervision and management of groups of young people and vulnerable adults in a wide range of settings;
- Competence in sensible and proportionate assessment and management of risk in a variety of relevant contexts;
- The ability to interpret, refine and present national guidance at a local level;
- The ability to provide effective advice and training for Educational Visit Coordinators (EVCs) and visit leaders;
- Knowledge of when and how to access technical experts when specialist advice beyond their own competence is required.

The responsibilities in the adviser’s job description should include the following, unless the employer has clearly delegated these elsewhere:

- Advising about compliance with relevant legal requirements – see OEAP National Guidance document 3.2a “Underpinning Legal Framework”;
- Interpreting, refining and presenting national guidance at a local level;
- Advising headteachers and managers about the appointment of EVCs, and supporting the induction of newly appointed EVCs;
- Providing advice and support to those involved in outdoor learning and off-site visits, especially to EVCs;
- Monitoring the work of EVCs and supporting establishments to ensure that their EVCs’ training needs are identified and met;
- Providing advice on appropriate leader competence for all types of outdoor learning and off-site visits, and ensuring that this is appropriately assessed;
- Providing advice on safeguarding during outdoor learning and off-site visits, including about requirements for Disclosure and Barring Service checks;
- Engaging actively with appropriate networks and organisations such as OEAP, so as to have access to advice about areas in which they are not personally knowledgeable;
- Maintaining and sharing knowledge of national requirements and initiatives, and of national schemes such as the Learning Outside the Classroom Quality Badge, national governing body accreditation schemes and AALA licensing;
- Implementing effective and proportionate policies and procedures for the notification and approval of outdoor learning activities and off-site visits;
- Approving (or disallowing) plans for activities and visits on behalf of the employer, where

this has not been delegated to establishment level;

- Monitoring the provision of outdoor learning and off-site visits, including whether risks are appropriately assessed and managed – see OEAP National Guidance document 3.2b “Monitoring”;
- Reviewing policies and procedures in the light of lessons learned, and sharing good practice widely;
- Contributing to the investigation of serious accidents and incidents.

- **Trustees**

As a Trustee of the management board you should seek to enable and ensure high quality visits and outdoor learning through support and challenge as a ‘critical friend’.

You should ensure that:

- You understand who the employer is in your setting – see OEAP National Guidance document 1c “Status, Remit and Rationale” ([www.oeapng.info](http://www.oeapng.info));
- If the management board/governing body is the employer of establishment staff, you are aware of the employer’s responsibilities, including under health and safety law – see below;
- There is a policy for off-site visits and outdoor learning;
- The policy covers charging for visits and activities;
- There is a plan for emergencies;
- The school has access to advice to inform its policy, practices and procedures relating to the health and safety of participants in outdoor learning and off-site visits, such as from an Outdoor Education Adviser (EVOLVE) appointed by the employer;
- The establishment appoints an Educational Visits Coordinator (EVC), and the roles and responsibilities of the EVC, board body members, the head/manager and other staff are clear;
- The head and the EVC take all reasonable and practicable measures to include in visits those with disabilities, special educational or medical needs, and those from all ethnic and socio-economic backgrounds.
- There are formal notification and approval procedures for visits, and the management board agrees on the types of visit it should be informed about;
- You challenge the nature of an activity or visit when the educational objectives are not clear or where the means to meet them do not appear to be realistic;
- There are procedures in place to monitor the safety, quality and effectiveness of off-site visits and outdoor learning.

It is not expected that you should become directly involved in risk assessment and related matters unless you have an appropriate competence. You should be aware that, if you offer professional advice, your professional indemnity insurance may not cover you for unpaid advice.

**The Management Board as an Employer**

The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer. Employers have duties to ensure, so far as is reasonably practicable, the

health, safety and welfare of all employees and others who may be harmed by their activities. See OEAP National Guidance document 3.1a “Requirements and Recommendations for Employers”.

- **Headteacher**

See also OEAP National Guidance document 3.3b “Check List – Headteacher/Manager” **Appendix 1** ([www.oeapng.info](http://www.oeapng.info)).

Outdoor learning and off-site visits can have a profound effect on children and young people and their well-being; positively influencing behaviour and relationships, developing self-confidence and raising achievement. In an educational setting, ‘real’ experiences make learning more engaging, relevant, enjoyable and memorable and should be integral to the establishment’s work.

The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer. It is critical that Headteachers are clear about who is their employer. See OEAP National Guidance document: 1c “Status Remit and Rationale”. Employers have duties to ensure, so far as is reasonably practicable, the health, safety and welfare of all employees and others who may be harmed by their activities. In addition, local authorities have a duty of care for the health and safety of all young people for whom they are responsible under the Children Act 2004.

As a Headteacher you should ensure that:

- You are familiar with your employer’s policies for outdoor learning and off-site visits;
- All activities and visits comply with employer and establishment policies and OEAP National Guidance, and are notified or submitted for formal approval as required;
- You agree who will approve visits at establishment level or submit them to the employer for approval if so required;
- Arrangements are in place for the Trust Board to be informed of such visits as required by your establishment’s policy;
- You have clearly designated either yourself or a suitable member of staff as the Educational Visits Coordinator (EVC), and the designated person meets your employer’s requirements, including undertaking training as required – see OEAP National Guidance document 3.4j “Educational Visits Coordinator”;
- The roles and responsibilities of those involved with visits are clear – see OEAP National Guidance document 3.1b “Establishment Roles and their Interdependence”.
- You and your EVC have access to expert advice, such as from a competent outdoor education adviser appointed by your employer;
- You have ascertained that all leaders are appropriately competent, confident and accountable to carry out the responsibilities they are allocated – see OEAP National Guidance document 3.2d “Approval of Leaders”;
- You support your EVC in ensuring that all activities and visits are effectively supervised with an appropriate level of leadership – see OEAP National Guidance document 4.3b “Ratios and Effective Supervision”;
- You support your EVC in ensuring that information has been shared with parents, and consent has been given if required – see OEAP National Guidance document 4.3d “Parental



Consent and Informing Parents”;

- When you take part in a visit or activity, you and other members of the Visit Leadership Team are clear about your role (if you are not leading the visit, you should follow the instructions of the designated Visit Leader, who should have sole charge of the visit);
- Suitable safeguarding procedures are in place, including appropriate vetting of all adults including volunteers, helpers and visitors – see OEAP National Guidance documents 4.3e “Safeguarding” and 3.2g “Vetting and DBS checks”;
- You have assigned sufficient time for leaders to organise activities and visits properly;
- You support an apprenticeship/succession-planning culture to ensure sustainable activities and visits and the development of competent leaders and EVCs;
- Arrangements have been made for the medical and special educational needs of all participants and staff;
- Inclusion issues are addressed – see OEAP National Guidance document 3.2e “Inclusion”;
- Suitable transport arrangements are in place – see OEAP National Guidance document 4.5a “Transport – General Considerations”;
- Systems are in place to ensure that equipment used during activities is suitable and safe – e.g., systems for recording inspections, recording use, and reporting defects;
- Appropriate insurance arrangements are in place – see OEAP National Guidance document 4.4c “Insurance”;
- Visits have contingency plans (a Plan B) to deal with changing circumstances;
- You obtain best value – consideration must be given to financial management, choice of external providers and facilities, and contractual relationships;
- Where charges are made to parents, these are within legal and employer requirements – see OEAP National Guidance document 3.2c “Charging for School Activities”;
- Appropriate procedures are in place to account for the visit finances;
- Risk management is proportionate, suitable and sufficient (see OEAP National Guidance document 4.3c “Risk Management – an Overview”) – it is good practice to adopt any materials made available by your employer to reduce bureaucracy;
- Where the activity or visit involves a third party provider, appropriate checks have been made and assurances obtained, a clear contract is in place setting out what the contractor is to provide, and the provider holds sufficient indemnity insurance – see OEAP National Guidance document 4.4g “Selecting External Providers and Facilities”;
- Establishment policy identifies the types of visit that require a preliminary visit by staff;
- There are suitable emergency procedures in place for each visit, and your establishment has an Emergency Plan for off-site visits – see OEAP National Guidance document 4.1d “Emergencies and Critical Incidents – Guidance for Establishments”;
- Details related to off-site activities and visits (including personal details of both participants and leaders) are accessible at all times to designated 24/7 Emergency Contacts in case of a serious incident;
- Anyone designated as an Emergency Contact is contactable and available for the full duration of the visit 24 hours a day, has the authority to make significant decisions, is able to respond immediately to the demands of an emergency, and has a back-up person or number;
- There are systems in place to monitor the progress of visits while they are away from the establishment, and to raise an alert if a group does not report or return when expected;

- Provision is monitored to ensure good practice and compliance with employer and establishment requirements, and to identify any training needs – see OEAP National Guidance document 3.2b “Monitoring”;
- Serious incidents are reported to the employer as required by your employer’s guidance, meeting the requirements of RIDDOR;
- All visits are reviewed, addressing issues raised by any incident and informing future visits – see OEAP National Guidance document 4.2c “Reviewing”;
- Visits are evaluated against their aims and objectives – see OEAP National Guidance document 5.1d “Evaluation”;
- Outdoor learning and visits are included within the process of establishment self-evaluation – see OEAP National Guidance document 5.1c “Self-Evaluation and the Ofsted Framework”;

You may wish to consider using the OEAP National Guidance model forms etc., some of which can be adapted specifically for your establishment ([www.oeapng.info](http://www.oeapng.info)).

● **Educational Visits Coordinator**

It is good practice for all establishments to have an Educational Visits Coordinator (EVC), and your employer’s policy may make this a requirement. The Department for Education recommends that all schools should appoint an EVC. Where an EVC is not nominated, by default this function rests with the Headteacher. When appointing an EVC, establishments should ensure that the appointed person meets the criteria required or recommended by this guidance. The EVC should be specifically competent. The level of competence required can be judged in relation to the size of the establishment as well as the extent and nature of the visits planned. Evidence of competence may be through qualification, but more usually will be through the experience of practical leadership over many years. Such a person should be an experienced visit leader with sufficient status within the establishment to guide the working practice of colleagues leading visits. This cannot be a purely administrative role, although certain tasks may be delegated to an administrator. Where the EVC is not selected on these criteria (as where the EVC role is attached to an administrative post or where a post holder is not an experienced visit leader) the EVC will require structured access to and support from a designated colleague who fits the recommended criteria and who will fulfil those aspects not covered by the post holder. The EVC should have access to expert advice provided by the employer, such as from a competent Outdoor Education Adviser.

As an EVC your key functions are to ([www.oeapng.info](http://www.oeapng.info)):

- Be a champion for all aspects of visits and outdoor learning;
- Challenge colleagues across all curriculum areas to use visits and outdoor learning effectively in order to provide a wide range of outcomes for children and young people and contribute towards establishment effectiveness;
- Support/oversee planning so that well considered and prepared arrangements can lead to well-managed, engaging, relevant, enjoyable and memorable visits and outdoor learning;
- Support your Headteacher in ensuring that your establishment fulfils its duty of care and

- complies with legal requirements regarding outdoor learning and off-site visits – see OEAP National Guidance document 3.2a “Underpinning Legal Requirements and Duty of Care”;
- Ensure good practice in the provision of visits and outdoor learning – see OEAP National Guidance document 4.3a “Good Practice – the Basics”;
  - Mentor leaders and aspirant leaders, supporting their ongoing development and training;
  - Ensure that leaders are competent to lead the activities and visits to which they are assigned – see OEAP National Guidance document 3.2d “Approval of Leaders”;
  - Ensure that Disclosure and Barring Service (DBS) disclosures are in place as necessary – see OEAP National Guidance document 3.2g “Vetting and DBS Checks”;
  - Support leaders to ensure that parents are fully informed about visits, and to obtain parental consent as necessary – see OEAP National Guidance document 4.3d “Parental Consent and Informing Parents”;
  - Ensure that emergency arrangements are sufficient, and that there is an emergency contact for each visit – see OEAP National Guidance document 4.1d “Emergencies and Critical Incidents – Guidance for Establishments”;
  - Monitor provision in your establishment to ensure good practice and compliance with employer and establishment requirements, and to identify any training needs – see OEAP National Guidance document 3.2b “Monitoring”;
  - Ensure that planning complies with your employer’s requirements and that, where required, the arrangements are submitted for approval within agreed timescales;
  - Support your Headteacher and Trustees in approval decisions so that all those with responsibility have the competence to fulfil their roles;
  - Ensure that all activity is reviewed and evaluated, that good practice is shared, and that any issues are followed up – see OEAP National Guidance documents 4.2c “Reviewing” and 5.1d “Evaluation”;
  - Keep records of individual visits including reports of accidents and near-misses;
  - Keep your Headteacher and Trustees informed about the visits and outdoor learning taking place and their contribution to establishment effectiveness.

**Appendix B - Checklist - Educational Visit Coordinator (EVC)**

- **Visit Leadership Team**  
 All leaders have a legal duty of care and must comply with their employer’s policy and guidance.  
 The Visit Leader has overall responsibility for a visit. This includes the learning, development, supervision and welfare of the participants and the health and safety of all, including any other leaders and helpers.  
 An Activity Leader is responsible for one or more specific activities during a visit. Sometimes a Visit Leader or Activity Leader is supported by one or more Assistant Leaders or Helpers. See OEAP National Guidance documents 3.4L “Assistant Leader” and 3.4 “Helper”.  
 During some visits, all the participants remain in one group. The Visit Leader might act as Activity Leader for all activities during the visit, or hand over leadership of one or more activities to an Activity Leader or third-party provider, while retaining oversight. During other visits, the group splits into smaller groups for some activities. In this case, the

Visit Leader hands over the leadership of one or more activity groups to an Activity Leader or third-party provider, while retaining oversight of the whole visit and perhaps acting as an Activity Leader for one group. There should always be a single designated leader for any visit or activity and, if this role changes, there should be a clear handover. At any time, every leader should know which participants they are responsible for, and every participant should know which leader is responsible for them.

Leader Competence and Approval

Employers must ensure that leaders are specifically competent for the type of visit and activities they plan to lead, and are approved to do so. For detailed guidance about leader competence and approval, see OEAP National Guidance document 3.2d “Approval of Leaders”.

It is recommended that Visit Leaders should undertake Visit Leader Training, with regular update training, delivered by a suitably competent person such as an Outdoor Education Adviser.

Staff Ratios and Planning

Decisions about the number of leaders required, and staffing ratios, should be informed by risk assessment and should take into account the mix of competence needed to fill various roles and the SAGE variables (Staffing, Activity, Group and Environment) – see OEAP National Guidance document 1b “Foundations”. For further information see OEAP National Guidance document 4.3b “Ratios and Effective Supervision”.

Planning for a visit should include consideration of the possibility of the Visit Leader or an Activity Leader becoming incapacitated. This might be caused by illness, injury, personal issues or being required elsewhere (such as to look after a sick child). Examples of possible plans include:

- The group is accompanied by an Assistant Leader who is fully competent to take over and deputise for an incapacitated Visit Leader or Activity Leader;
- The group is accompanied by an Assistant Leader or Helper who is sufficiently competent to abandon the visit or activity and supervise the group safely back to base (or who could supervise the group until support from the establishment can arrive);
- A backup leader is available back at the establishment, who is able to join the group at short notice;
- No other responsible adult is present, but the participants are judged sufficiently responsible and competent to deal with such a situation.

Advice for Visit Leaders

You must not lead an activity or visit unless you have been approved to do so by your employer. You must be specifically competent for the type of visit, and for any activities you plan to lead.

Depending upon the nature of the visit, you should:

- Ensure that the visit has clear aims;
- Be able to use the chosen environment or venue(s) to facilitate the intended learning or development outcomes;
- Assess the risks involved in the visit, and ensure that the visit is planned to appropriately balance benefits and risks – see OEAP National Guidance documents 4.3f “Risk Management – Some Practical Advice” and 4.1a “Avoiding Accidents and Emergencies”;
- Follow the advice in the OEAP National Guidance documents about specific types of visit, activity and hazard that are relevant to the visit – see [oeapng.info/downloads/specialist-activities-and-visits](http://oeapng.info/downloads/specialist-activities-and-visits);
- Ensure that any transport arrangements are suitable – see OEAP National Guidance document 4.5a “Transport General Considerations”;
- Liaise with your establishment’s EVC to ensure that all leaders and helpers accompanying the visit are competent for those roles and meet establishment requirements – Activity Leaders must be competent and confident to lead their planned activities, and be approved by your employer to do so if this is required (e.g., for adventure activities);
- Define the roles and responsibilities of other leaders and helpers, appointing a deputy if possible;
- Ensure that, if the visit leadership team includes someone with a close relationship to a member of the group, this is managed to avoid any possible compromise of effective supervision;
- Take a lead on risk management, involving all the visit leadership team to ensure they understand what they need to do, and involving participants wherever appropriate;
- Have alternative plans (a ‘Plan B’) in case the itinerary needs to be changed – see below;
- Have an effective emergency plan – see OEAP National Guidance document 4.1c “Emergencies and Critical Incidents – Guidance for Leaders”;
- Provide information to other leaders and any external provider, as relevant, such as:
  - o the visit’s aims, and how they can contribute to achieving these;

- o their roles;
- o travel and accommodation arrangements;
- o the location and any specific hazards at it;
- o the participants (names, ages, health information, capabilities, special needs, safeguarding and behavioural issues);
- o expected standards of behaviour;
- o emergency procedures (including how to access participants’ emergency contact details and medical consent etc.);

- Ensure that participants are effectively supervised – see OEAP National Guidance document 4.2a “Group Management and Supervision”;
- Have a list/register of all group members, and conduct regular headcounts;
- Ensure that participants know what to do if they get lost or separated from the group;
- Ensure that child protection issues are addressed, that good safeguarding practice is followed and that adults are appropriately vetted and checked – see OEAP National Guidance

documents 4.3e “Safeguarding” and 3.2g “Vetting and Disclosure and Barring Service (DBS) Checks”;

- Ensure that parents have been fully informed, and that parental consent has been obtained as necessary – see OEAP National Guidance document 4.3d “Parental Consent and Informing Parents”;
- Ensure that participants are aware of expected standards of behaviour, and any consequences if these are not met;
- Ensure there is access to first aid at an appropriate level – see OEAP National Guidance document 4.4b “First Aid”;
- Ensure that any medication needs of participants are addressed – see OEAP National Guidance document 4.4d “Medication”;
- Encourage children to maintain good hygiene during a visit, such as washing hands after visiting the toilet and before eating;
- Check with your EVC whether the visit is covered by adequate insurance – see OEAP National Guidance document 4.4c “Insurance”;
- Review all aspects of the visit, both during and after the event – see OEAP National Guidance document 4.2c “Reviewing”;
- Liaise with your EVC about evaluation of the visit – see OEAP National Guidance document 5.1d “Evaluation”;
- Report any accidents, incidents or near misses, following your employer’s procedures.

#### **Using an External Provider**

You should ensure that any external provider involved in the visit, or any external facilities you plan to use, have been checked to ensure their suitability. See OEAP National Guidance document 4.4g “Selecting External Providers and Facilities”. When working with third-party activity providers it is essential to avoid ‘grey areas’. You should ensure that the relative roles and responsibilities of establishment staff and provider staff are clear, and that there is a clear handover when there is a change of leader. See OEAP National Guidance document 4.4h “Using External Providers”. Should a provider run an activity in a way that causes concern, the accompanying leader(s) should consider whether to intervene at the first appropriate moment. This should be done with sensitivity and discretion to ensure that it does not result in young people being put at greater risk.

#### **Advice for Activity Leaders**

You should:

- Understand the aims of the visit, and of your particular activity;
- Be specifically competent for the activities you plan to lead, and have been approved to do so by your employer;
- Be able to use the chosen environment or venue(s) to facilitate the intended learning or development outcomes;
- Be aware of:
  - o the activity location and any specific hazards at it;
  - o relevant information about the participants (e.g., age, health information,

capabilities, special needs, safeguarding and behavioural issues);  
 o emergency procedures (including how to access participants' emergency contact details and medical consent etc.);

- Assess the risks involved in the activities you will lead, and ensure that they are planned to appropriately balance benefits and risks – see OEAP National Guidance documents 4.3f “Risk Management – Some Practical Advice” and 4.1a “Avoiding Accidents and Emergencies”;
- Follow the advice in the OEAP National Guidance documents about specific types of activity and hazard that are relevant to the activities you will lead – see [oeapng.info/downloads/specialist-activities-and-visits](http://oeapng.info/downloads/specialist-activities-and-visits);
- Ensure that participants are effectively supervised – see OEAP National Guidance document 4.2a “Group Management and Supervision”;
- Ensure that you are clear about which participants you are responsible for at any particular time, and that there is a clear handover to and from other leaders;
- Carry a list of all participants, and conduct regular headcounts;
- Have an alternative plan (a ‘Plan B’) in case the activity needs to be changed – see below;
- Have the means to contact the Visit Leader or other leaders, or to call for help in an emergency;
- Have access to a first aid kit, and be trained in first aid or know how you can get immediate help if necessary;
- Encourage children to maintain good hygiene during an activity, such as washing hands after visiting the toilet and before eating;
- Report any accidents, incidents or near misses to the Visit Leader.

### **Plan**

### **B**

Good visit planning should include alternative plans in case the itinerary needs to be changed. Leaders faced with potential difficulties will feel more confident to change the itinerary if a pre-assessed alternative is available. For a simple situation, Plan B might be simply to terminate the visit or activity and return to base. A flexible itinerary can allow activities from later in the visit to be substituted for earlier activities if those are prevented by unexpected circumstances. Regardless of whether alternatives have been pre-assessed, you should always take time to reassess the risks if the itinerary changes. A different location or a different activity might present hazards not covered in the original risk assessment. See also OEAP National Guidance document 4.1a “Avoiding Accidents and Emergencies”.

### **Appendix C - Checklist - Visit Leader**

## **3. ESTABLISHMENT POLICY AND PROCEDURES**

All establishments offering activities within the scope of this policy :

- Must have an EVC who meets the requirements set out in the National Guidance.

- The EVC must complete training and revalidation as specified in “**Educational Visits Coordinator Training and Revalidation**” below.
- Establishments must have their own Education Visits policy which sets out their management and approval procedures. All establishment Educational Visits Policies must be consistent with National Guidance and this policy.

- **Consent**

The establishment’s educational visit policy should make 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; advice on legal duties and powers for local authorities, school leaders, school staff and governing bodies’. This states that consent for children over nursery age is not required for most activities in school time and where required, can be obtained at the point of entry to the school. Schools should still tell parents about these trips and give them the opportunity to withdraw their child. 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 schools.

Refer to National Guidance document: 4.3d Parental Consent and Informing Parents

Refer to amendable forms in the resources of Evolve

- **Staff Competence**

Staff leading, managing or approving off-site education visits, outdoor learning and adventurous activities must be competent and confident to carry out their role and be approved by their Headteacher and where appropriate, their employer.

- **Educational Visits Coordinator Training**

Every establishment must appoint a trained EVC. New appointees must complete an OEAP accredited EVC training course with CBMDC 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 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?
- 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 and / or Outdoor Education 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 establishment should contact Bradford Council's Outdoor Education Service if there is doubt regarding the competence of a member of staff to lead a visit. Refer to National Guidance document: 3.2d Approval of Leaders

## 4. PLANNING & 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:

- A crucial educational activity that is required to be undertaken by children or young people in order to meet statutory curriculum requirements.
- An important educational activity that is embedded in curriculum and course delivery, whereby learning is significantly disadvantaged through non-attendance.
- A valuable educational activity that relates closely to curricular content.
- An optional experience that promotes social and personal development, or an appreciation of the wider world.

'Crucial' and 'important' activities can be viewed as educational visits whereas 'valuable' and 'optional' 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

Plans should be proportionate and sensible, focusing on how to manage genuine risks.

### **Approval before contractual arrangements are made**

Visit Leaders must gain approval from the Headteacher before any contractual arrangements or financial commitments are made. Headteachers must ensure that any overriding contractual arrangements are made between the establishment 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. Establishment 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 Headteacher and employer prior to embarking on detailed arrangements.

### **Working with providers**

When an establishment 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.

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 should hold a minimum of £10 million Public Liability insurance.

The establishment should have an agreement with any provider without an assurance scheme which makes it clear what everyone is responsible for. This is especially important if they'll be taking over supervision of the children.

### Accommodation

Appropriate checks and/or assurances should be sought. The accommodation at an LOtC Quality Badge provider will have been deemed appropriate for educational visits. The relevant questions on the Provider Statement/Agreement can be used to help gather key information. Professional judgement 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 and that any equality issues are considered and addressed during planning.
- **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 school and whether it is close enough to rely on immediate support from the school, 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 Headteachers 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
- 7.1a Adventurous activities

Refer to DfE advice in relation to early years/foundation stage staff: child ratios [www.gov.uk](http://www.gov.uk):

- Early Years and Foundation Stage Statutory Guidance.

## 5. VISIT PLANNING & MANAGEMENT SYSTEM

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

All off-site educational visit, outdoor learning or adventurous activity including those which involves an external provider for teaching or instruction must be planned and approved through the employer system and added to the centralised calendar.

Adventure activities run on the school/establishment site should also be planned and approved through the employer system – refer to national guidance for a list of typical activities classed as adventurous for the purposes of this policy.

**Staff managing or leading visits must not decide to add adventure activities during the trip.**

Overseas expeditions require enhanced planning and establishments considering this should contact Bradford Council's Outdoor Education Service before booking – preferably at least 18 months prior to the planned event.

Refer to appropriate guidance.

## 6. INCIDENT MANAGEMENT

Headteachers 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 including communication plans that cover how routine communications should be handled, including regular check-ins and calls to reassure people. Establishments must also ensure they are familiar with their employer's procedures.

The Visit Leadership team should use the Visit Incident Management Action Card (see Emergency Critical Plan). The Base Contact should follow the Establishment Incident Management Plan.

Staff should undergo training at an appropriate level to ensure that they understand the procedures. Incident Management plans should be tested from time to time at both establishment level and employer level.

Refer to DfE advice [www.gov.uk](http://www.gov.uk): Model School Emergency Plan

Refer to further guidance: Employer and Establishment Incident Management Plans

## 7. MONITORING OF VISITS & PROCEDURES

Headteachers 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 in the establishment visit policy who is responsible for carrying out this monitoring.

This may be supplemented by field monitoring by Bradford Council's Outdoor Education Service.

Refer to appropriate guidance and updates or emergency revisions

Refer to National Guidance document: 3.2b Monitoring

## 8. CHARGES FOR OFF-SITE ACTIVITIES & VISITS

### Charging and remissions

The Education Act 1996, sections 449-462 sets out the law on charging for school activities in maintained schools. The Department for Education provides guidance for Heads and Governing Bodies as to the requirements of a charging and remissions policy, voluntary contributions and what can or cannot be charged for proprietors of academies and free schools are also required to hold a charging and remissions policy via their funding agreement with the Secretary of State.

Refer to National Guidance document: 3.2c Charging for school activities

Refer to DfE document [www.gov.uk](http://www.gov.uk):

- Charging for School Activities [www.gov.uk](http://www.gov.uk)

## 9. INCLUSION & SEND

Activities should be available to all, irrespective of special educational or medical needs or protected characteristics (disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex, sexual orientation).

### Special Educational Needs and Disabilities

The Equality Act states that an establishment (a school) cannot unlawfully discriminate against a young person because of one of the protected characteristics. There are limited exceptions to the discrimination provisions in education such as admission to single sex schools or schools with a religious character.

This is a complex area of law which includes special provisions for disability. There is a duty to make reasonable adjustments. This means that schools are allowed to treat disabled pupils more favourably

than non-disabled pupils, and in some cases are required to do so, by making reasonable adjustments to put them on a more level footing with pupils without disabilities. Establishments must have due regard to equality considerations whenever significant decisions are being made or policies developed and should take appropriate advice.

Consideration must be given to the equality implications and viable adjustments which can be made for disabled pupils 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). However, there may be times when adjustments for a disabled pupil cannot be made because to do so would have a detrimental effect on other pupils and would therefore not be reasonable. In these circumstances the establishment would not have to cancel the trip as originally planned. If a decision is taken not to include a disabled 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 decide not to take or to exclude a young person on a trip 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. Establishments need to consider whether behaviour issues are associated with a protected characteristic or medical grounds in which case the Equality Act may apply. Pupils who do not take part in a school trip for whatever reason must still attend school.

Refer to National Guidance documents: 3.2e Inclusion  
4.4i Special Educational Needs and Disabilities

Refer to DfE advice [www.gov.uk](http://www.gov.uk): Equality Act 2010: advice for schools

## 10. 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.

Refer to National Guidance documents: 3.2g Vetting and Disclosure and Barring Service (DBS) Checks  
4.3e Safeguarding

Refer to DfE advice [www.gov.uk](http://www.gov.uk):

- Keeping Children Safe in Education
- Safer Working Practice Guidance

## 11. INSURANCE

### Travel/Journey

### Insurance

Establishments should ensure they have appropriate travel/journey insurance in place which covers participants for all activities on the visit. Establishments should consult their insurers to establish that cover is in place for unusual or overseas visits as required. Establishments should check any cancellation provisions in the insurance cover and be clear what cover is in place in the event that planned trips cannot go ahead or need to be cancelled. Schools should seek to avoid cancelling any trips and secure the agreement to defer trip dates or receive vouchers in return. Public Liability and Employer’s Liability Establishments should ensure that their Public Liability and Employer’s Liability covers the establishment, employees and non-employees during any activity undertaken during the visit.

Refer to National Guidance document: 4.4c Insurance

## 12. 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 establishments must follow any specialist guidance provided by your employer.

### Cars

Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures and appropriate insurance in place.

### Coaches

Establishments 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.

Refer to National Guidance documents:

4.5a Transport: General Considerations

4.5b Transport in Minibuses

4.5c Transport in Private Cars

4.5e Hiring a Coach

Refer

to

DfE

advice

[www.gov.uk](http://www.gov.uk):

Driving school minibuses: advice for schools and local authorities



## EQUALITY IMPACT ASSESSMENT

An Equality Impact Assessment (EIA) is an evidence-based approach designed to help organisations ensure that their policies, practices, events and decision-making processes are fair and do not present barriers to participation or disadvantage any protected groups from participation.

**Appendix A - Establishment Self-evaluation Form  
- outdoor learning & off-site visits**

This form is intended to help evaluate and monitor the management of outdoor learning and off-site visits. It is suggested that the EVC and Headteacher complete the form together and the CEO and Trustees are involved as appropriate.

Score each requirement on a scale of 1 to 3, add comments as appropriate.

1. Unsatisfactory - immediate action required
2. Requires improvement
3. Satisfactory

At the foot of the form are two additional forms to record any required actions or training identified during the evaluation. For reference : National Guidelines <https://oeapng.info/>

School :

Headteacher :

EVC :

Date completed :

Requirement	Score	Comments
Outdoor learning and educational visits are an integral part of the work of the establishment and there is clarity about their purpose and contribution to the ethos of the school		
The school has an Educational Visits Coordinator who is an experienced visit leader		
Roles relevant to visits/outdoor learning are clear		
There is access to advice such as from a competent education advisor (EVOLVE)		
There is a policy for visits/outdoor learning, which follows any relevant employer policies, and adopts OEAP National Guidance		
Any training required by the policy has been undertaken		
There are standard operating procedures for straightforward and routine visits/activities		
Staff induction and training needs are identified and addressed		

<b>Procedures are followed correctly and visits are formally notified and approved as required by the policy</b>		
<b>Procedure and responsibility for engaging leaders and determining their competence is clear</b>		
<b>All adults including volunteers are vetted and those engaging in regulated activity have enhanced DBS checks with barred list check</b>		
<b>Inexperienced visit leaders receive training/mentoring alongside experienced colleagues</b>		
<b>Information about the range of visits/outdoor learning and their contribution to school effectiveness is regularly considered by senior leadership/management and by Trustees</b>		
<b>External providers are appropriately selected and used</b>		
<b>Systems are in place for informing parents and for obtaining their consent when required</b>		
<b>Systems are in place for obtaining and securely handling up-to-date participant data including contact details, medical information, dietary requirements and information about special needs</b>		
<b>Medical, dietary, first aid, inclusion and accessibility issues are all addressed</b>		
<b>The planning and management of visits takes into account current government guidance about epidemics</b>		
<b>Safeguarding issues are addressed</b>		
<b>Any travel, transport and residential arrangements are appropriate</b>		
<b>Plans for visits/outdoor learning include alternative options (Plan B) for potential changes of circumstances</b>		
<b>There is an establishment emergency plan which is periodically tested</b>		
<b>There are arrangements for emergency contact</b>		

including for activity beyond normal school hours and 24/7 for residential with access to all relevant information and documentation		
Accidents and incidents are reported and investigated, learning is shared and RIDDOR requirements are met		
Visits Leaders have access to sufficient funds and an effective means of communication in case of emergency		
The school has suitable insurance in place to cover the normal range of visits and activities and specific additional insurance is arranged when necessary		
Any charges to participants/parents comply with the establishment's charging policy		
Contracts with providers and participants/parents are satisfactory		
The requirements of the Package Travel Regulations are met for any visits organised by the school that are in their scope		
Monitoring is in place to ensure that all requirements of the employer and school are met and that the quality of visits/outdoor learning meets expectation		
Visits/outdoor learning are reviewed and evaluated and good practice is shared		

**If the evaluation has identified the need for specific actions, note them here**

Action required	Person responsible	Target date

**If the evaluation has identified any training needs, note them here**

Training need identified	People in need of training	Target date

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## Appendix B - Checklist - Educational Visit Coordinator (EVC)

In this checklist, the term ‘visits’ includes outdoor learning, offsite visits and adventure activities. Information about good practice can be found in the National Guidance ( <https://oeapng.info/> )

Name of school :

Name of EVC completing the checklist :

Date :

	I have undertaken EVC training and remain currently competent and I have access to competent advice such as from an outdoor education advisor (EVOLVE)
	I have an understanding of how visits can support a wide range of outcomes for participants
	My school has a policy for visits, which I understand, and it adopts OEAP National Guidance
	My school has standard operating procedures for straightforward and routine visits
	Visits are an integral part of the work of the school and have clear learning/development intent
	I support/oversee planning so that visits are well managed, engaging, relevant enjoyable and memorable
	Procedure and responsibility for engaging leaders and determining their competence is clear and I support those involved in approval decisions
	Leader induction and training needs are identified and I support leader development, sampling activity to identify any further training needs
	Leaders are encouraged and supported to make preliminary visits as necessary
	Visit leaders are responsible for and have ownership of visit plans including risk-benefit management
	Where appropriate all leaders and participants are involved in the planning process
	Visits have sufficient leaders to ensure effective supervision and to deal with incidents and emergencies
	Everyone is aware of their roles and responsibilities
	NOTification and approval procedures are in place and are followed correctly and within agreed timescales

	Visits are regularly considered at senior leadership/management level and by Trustees and I provide information about the range of activity and its contribution to the quality of education
	External providers are appropriately selected and used
	Systems are in place for informing parents and for obtaining their consent when required
	Systems are in place for obtaining and securely handling up-to-date participant data including contact details, medical information, dietary requirements and information about special needs
	Medical, dietary, first aid, inclusion and accessibility issues are all addressed
	Than planning and management of visits takes into account current government guidance about epidemics
	Safeguarding issues are addressed and any necessary DBS checks are completed
	Any travel, transport and residential arrangements are appropriate
	There are systems to ensure that any equipment used during activities is suitable and safe, eg for recording inspections and use and reporting defects
	Visits have alternative options (a Plan B) if indeed
	There is an emergency plan which is periodically tested
	Accidents and incidents are reported and investigated, learning is shared and RIDDOR requirements are met
	Where necessary, there is a designated 24/7 emergency contact with access to all information and documentation relating to the visit
	Systems are in place to monitor visits while they are away and to raise an alert if they do not report or return when expected
	Visits leaders have access to sufficient funds and an effective means of communication in case of emergency
	The school has suitable insurance in place to cover the normal range of visits and specific additional insurance is arranged when necessary
	Any charges for visits comply with the school's charging policy
	Contracts with providers and participants/parents are satisfactory
	I have checked whether any adventure activities that the school itself provides require it to obtain an Adventure Activities Licence
	I have checked whether any visits are in scope of the Package Travel Regulations

	Monitoring is in place to ensure that all requirements of the employer and school are met and that the quality of visits meets expectations
	Visits are reviewed and evaluated and good practice is shared

### Appendix C - Checklist - Visit Leader

This list is a prompt for visit planning and a final check. The relevance of each point and the complexity of responses, depends on the nature of the visit. Information about good practice can be found in the National Guidance

Name of school :

Brief description of visit :

Date of visit :

Name of Visit Leader completing the checklist :

Date :

GENERAL	
	The intent of the visit is clear, integral to the school's curriculum/programme and focuses on the learning and development of the participants
	The risks of all aspects of the visit have been considered and it is clear what leaders need to do to manage the risks
	There is access to first aid appropriate to the planned activities, the group, the environment and the remoteness of visit/activity locations
	Suitable insurance is in place
	There are alternative options (a Plan B) as necessary
	There are emergency procedures for which leaders and emergency contacts have been prepared and which are appropriate to the planned activities, the group, the environment and the remoteness of visit/activity locations
	I have access to sufficient funds
	External providers and facilities meet expected standards
	Any contract with a provider is satisfactory and has been agreed by an authorised person in school
	The visit meets the requirements of my employer and school
	Evaluation and review arrangements have been agreed

<b>STAFFING</b>	
	I am clearly identified and approved as the Visit Leader and am aware of my responsibilities
	All leaders and helpers are clear about their roles, can fulfil them competently and have been approved
	There are sufficient leaders and helpers to ensure effective supervision and deal with incidents and emergencies
	If the visit involves an external provider, there is clarity about the respective roles of provider staff and school staff
	Leaders and helpers have received all relevant information about the visit and the group and are clear about any risks and their role in managing them
	If accompanying leaders are taking a member on the visit, there are arrangements to ensure that this will not compromise group management
	I have kept my Educational Visits Coordinator (EVC) informed during the planning process
<b>TIMING</b>	
	The timing of the visit is appropriate
<b>ACTIVITIES</b>	
	The programme of activities is designed to achieve the visit's intent and is appropriate to the nature of the participants
	The risks involved in specific activities have been considered
	The Visit Leadership Team includes leaders competent in the planned activities, or a suitable provider has been contracted to lead the activities
	There is sufficient equipment available, which has been checked for suitability and safety
<b>GROUP</b>	
	Parents have been fully informed about the visit and have given their consent if this is required
	There are clear agreements with participants/parents about any requirements such as charges. If necessary these are aligned with the terms and conditions of any contracts with providers
	Up to date contact details, medical and allergy information, dietary requirements and



	information about special needs are available and shared appropriately with the Visit Leadership Team and any provider
	If food is provided it meets the requirements of “Natasha’s Law”
	Where appropriate participants have been involved in planning, including identifying and deciding how to manage risks
	Plans for the visit comply with current guidance about epidemics
	Participants are physically fit for the planned activities and have received any necessary training
	Participants have appropriate clothing and footwear (or this is provided as necessary)
	The group will be managed and supervised appropriately
	Safeguarding issues are addressed
	Inclusion issues are addressed
	Medication issues are addressed
	Dietary issues are addressed
<b>ENVIRONMENT</b>	
	Environmental factors (eg weather, water levels, natural and man-made hazards) have been considered
	Accessibility issues are addressed
	I have undertaken a preliminary visit, or am already familiar with the venue and any provider, or have sufficient information from other sources
	Where remote supervision will be used the environment is suitable
	Any accommodation is safe and suitable
	Security is addressed, especially for residential and overseas visits
	The risk of terrorism has been considered
<b>REMOTENESS</b>	
	Travel/transport arrangements are appropriate
	Routine and emergency communication arrangements are appropriate to the location of the visit and all planned activities (eg if remote from a mobile signal)
	If the visit involves travel overseas, I have consulted the checklist and guidance for overseas visits

<b>FINALLY</b>	
	<b>My decision is that this visit is well prepared and should take place</b>
	<b>The visit plan has been approved by my school/employer if required</b>

**For reference : National Guidelines <https://oeapng.info/>**