



# Surfleet Primary School Educational Visits Policy

## RESPONSIBLE PERSONS

Mr A. Raistrick      Executive Headteacher  
Mr R. Chipperfield      Head of School/EVC

**Date of Approval: June 2019**

**Review date: September 2019**

# Educational Visit Policy

## 1. Context/Policy Statement

At Surfleet Primary School we believe that outdoor learning, off-site visits and learning outside the classroom are an integral part of the entitlement of every child to an effective and balanced curriculum. Appropriately planned visits are known to enhance learning and improve attainment and so form a key part of what makes the school a supportive and effective learning environment. The benefits of pupils taking part in visits and learning outside the classroom include (but are not limited to):

- Improvements in their ability to cope with change and novelty.
- Increased critical curiosity and resilience.
- Opportunities for meaning making, creativity, developing learning relationships and practicing strategic awareness.
- Increased levels of trust and opportunities to examine the concept of trust (us in them, them in us, them in themselves, them in each other).
- Improved achievement and attainment across a range of curricular subjects. Pupils are active participant's not passive consumers and a wide range of learning styles can flourish.
- Enhanced opportunities for 'real world' 'learning in context' and the development of the social and emotional aspects of intelligence.
- Increased risk management skills through opportunities for involvement in practical risk-benefit decisions giving them the tools and experience necessary to assess their own risks in a range of contexts.
- Greater sense of personal responsibility.
- Possibilities for genuine team working including enhanced communication skills
- Improved environmental appreciation, knowledge, awareness and understanding of a variety of environments.
- Improved awareness and knowledge of the importance and practices of sustainability.
- Physical skill acquisition and the development of a fit and healthy lifestyle.

The staff and governors at Surfleet Primary School fully recognise that learning outside the classroom helps to bring the curriculum to life as it provides deeper subject learning and increases self-confidence. It also helps pupils develop their risk awareness and prepares them for their future working lives the school adopts the Outdoor Education Adviser's Panel (OEAP) National Guidance for all educational visits available at [www.oeapng.info](http://www.oeapng.info)

Chair of Governors .....

Head Teacher .....

Date .....

Date .....

# Educational Visit Policy

## 2. Employer responsibilities

The Governing Body, Executive Head and Head of School meet their obligations to provide staff with guidance, training and support in the following ways:

**a. Appropriate guidance.**

- The appropriate guidance for the management of outdoor learning and off-site visits is the Outdoor Education Advisors Panel (OEAP) National Guidance, this is available to all staff, governors and parents on the web site – [www.oeapng.info](http://www.oeapng.info)

**b. Training to support the guidance to ensure that it is understood.**

- For those involved in managing and leading visits the relevant training courses are:

- 1. Educational Visit Coordinator (EVC) Training** – the school requires the EVC to be appropriately trained having attended an OEAP Educational Visit Coordinator Training.
- 2. Visit Leader Training** – the school takes a sensible and proportionate approach to the training required by visit leaders depending on knowledge, experience and the trip being undertaken.

Visit leader training is a pre requisite for:

Foreign travel.

Adventurous activities whereby the activities are directly led by school staff.

Visit leader training may be required for certain other visits whereby a significant proportion of the visit is being led by school staff. This decision will be made by the Executive Headteacher after reviewing the individual circumstances.

Local trips within the School Learning Area (see appendix 1) and some day trips of a low risk nature may be undertaken by competent staff who have not attended Visit Leader training on authorisation of the Head Teacher.

**c. Suitable systems and processes to ensure that those trained are kept updated.**

- For the purposes of day-to-day updating of information, EVCs and Visit/Activity Leaders are directed to the periodic news items and updates of OEAP National Guidance.

**d. Access to advice, support and further training.**

- Where an employee experiences problems with finding the material they are looking for, or require clarification or further help, guidance or bespoke training, they should contact EVOLVE (Lincolnshire Area)

- **3. Application**

This policy covers any visit that leaves the school grounds, whether as part of the curriculum, during “normal” school time or outside the “normal” school day.

Surfleet Primary School adopts the Outdoor Education Adviser’s Panel (OEAP) National Guidance available at [www.oeapng.info](http://www.oeapng.info)

# Educational Visit Policy

All staff are required to plan and execute visits in line with this policy and National Guidance. Staff are particularly directed to be familiar with the roles and responsibilities outlined within National Guidance.

## 4. Roles and responsibilities

**Visit Leaders** are responsible for the planning of visits but should involve both accompanying colleagues and the pupils in this process. Staff must make appropriate checks on venues and third party providers. Staff are advised to obtain outline permission for a visit, from the Head of School or Executive Head as appropriate, before beginning to plan/making any commitments. See Outdoor Education Adviser's Panel National Guidance for the role of the Visit Leader - <http://oeapng.info/visit-leader/>

**The Education Visit Coordinator (EVC)** is *Mr Rick Chipperfield (Head of School)* who will support and challenge colleagues over visits and learning outside the classroom. They are the first point of call for advice on visit related matters. The EVC will check final visit plans before submitting them to the Executive Head. See Outdoor Education Adviser's Panel National Guidance for the role of the EVC <http://oeapng.info/evc/>

**The Head of School** has responsibility for the monitoring and final approval of all local visits. **The Executive Head** supported by the **Head of School** has the responsibility for the monitoring and approval of all other visits, See Outdoor Education Adviser's Panel National Guidance for the role of the Head Teacher <http://oeapng.info/head-manager/>

### **The Governors**

It is recommended that the governing body is made aware of off-site educational and outdoor adventurous activities. Governors have a role in the monitoring and review of educational visits to ensure clear learning outcomes are achieved, visits are well planned and executed as well as value for money .

See Outdoor Education Adviser's Panel National Guidance for the role of the governing body <http://oeapng.info/governors/>

### **Educational Visits Advisor**

It is advisable that the visits and activities, listed below, are checked by the schools Educational Visits Advisor, Accredited Member of the Outdoor Education Adviser's Panel through Lincolnshire County Council before the activity takes place – see also page 6 and 7 of this policy detailing the process to be followed.

- overnight stays
- foreign travel
- adventurous activities

## 5. Preliminary Visits and Provider Assurances

### **Preliminary Visits**

Surfleet Primary School requires that all visits are thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people, it is a vital dimension of risk management.

## Educational Visit Policy

It is good management practice to carry out a preliminary visit. The following identifies the circumstances where preliminary visit is a requirement.

- Pre visit required for visits where there is a high complexity factor and the visit has not happened previously.
- Additionally required when visit is solely led by the School.
- Residential visits, visits abroad, exchange visits, adventure led by the School, staff all have aspects of complexity.

If the visit is led and managed by the provider, then a variety of approaches can reduce the need to pre visit.

Visit Leaders can take full advantage of the nationally accredited provider assurance schemes that are now available and assists to reduce bureaucracy – examples include: -

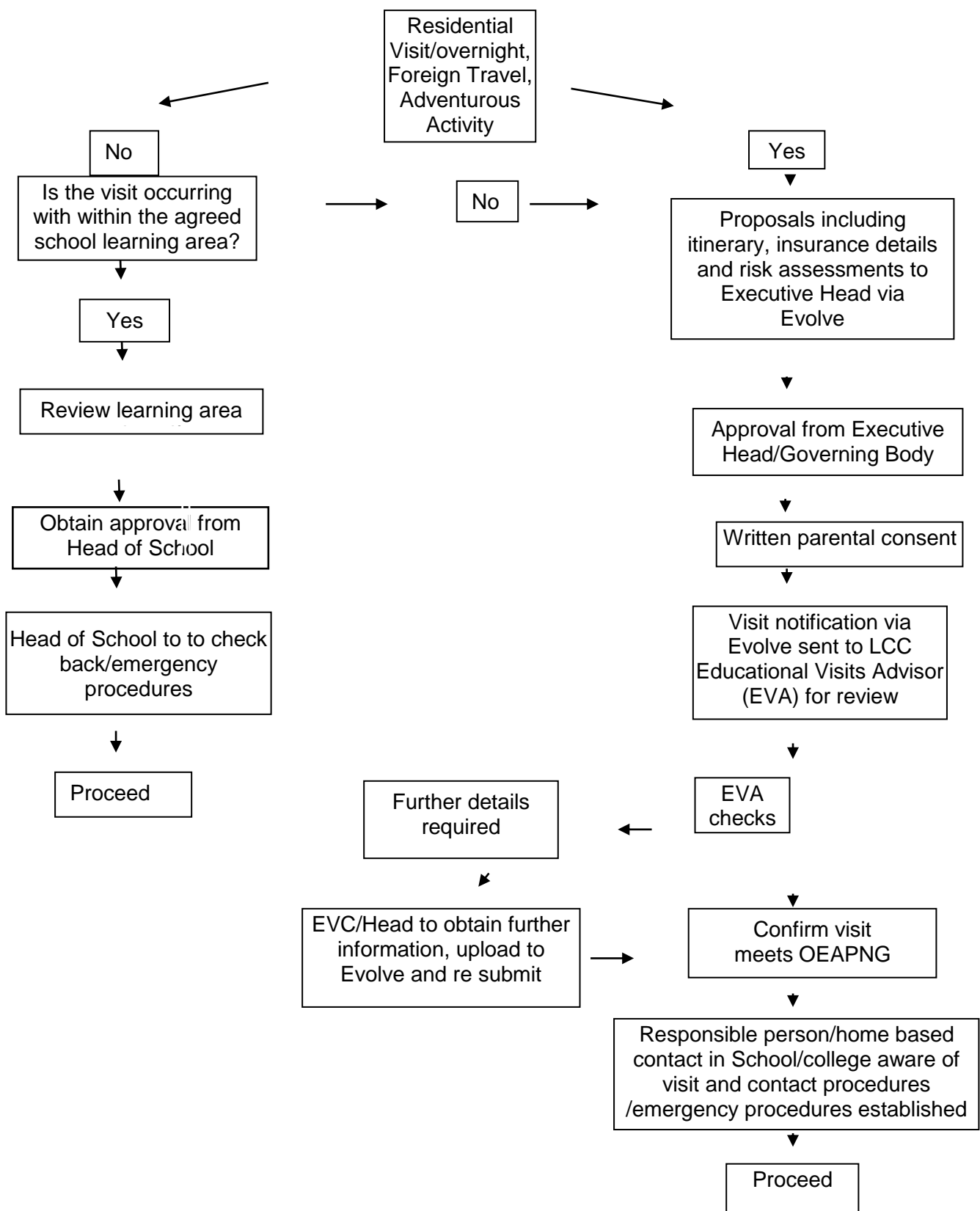
- The LotC Quality Badge
- AALS licensing
- Adventuremark

The OEAP takes the view that where providers holds one of the above accreditations, there should be no need to seek further assurances.

The OEAP National Guidance 4.4f – Assessing an adventure activity provider check list, 4.4h – using external providers and facilities and 8.8p – Provider Questionnaire - <http://oeapng.info/downloads/all-documents/> should be followed when undertaking pre visits and assessing providers.

# Educational Visit Policy

## Visits Notification Route



# Educational Visit Policy

## 6. Types of visit and approval

There are three types of visit, for each of which the approval process is slightly different:

1. Visit / activities within the School Learning Area (see appendix 1) and which involve no more than an everyday level of risk. Visits that are part of the curriculum and take place during the School day do not require consent. Those that are not part of the curriculum or extend beyond the School day are covered by blanket consent but information will be provided to parents in advance and they will have the opportunity to withdraw their child. These follow the learning area operating procedure (appendix 1). **Approval by Head of School.**
2. Day visits not within the School learning area, generally requiring additional consent and often requiring parent/carer financial contribution. Notification and planning details are input and uploaded onto the Evolve system at least 1 month in advance, checked by the EVC ready for review and approval. **Approval by the Executive Head.**
3. Residential visits and any visits involving adventurous activities. These visits require notification and planning details to be completed by the visit leader and submitted to the EVC for checking at least 3 months in advance. The EVC then submits to the Executive Head Teacher who forwards to the Educational Visits Advisor at Lincolnshire County Council at least 2 months in advance.  
**For adventurous activities**  
Visit Leaders must check if an activity provider holds either an AALA licence ([http://www.aals.org.uk/aals/provider\\_search.php](http://www.aals.org.uk/aals/provider_search.php)) or a LOTC quality badge (<http://www.lotcqualitybadge.org.uk/search>). If not the Visit Leader must send the OEAP National Guidance document 8p provider questionnaire (<http://oeapng.info/downloads/model-forms-mind-maps-and-checklists/>). Returned questionnaires must be scrutinised by visit leaders. **Final approval once reviewed by the Educational Visits Advisor by the Executive Head.**

## 7. Staff Competence

Surfleet Primary School recognises that staff competence is the single most important aspect of safe visit management and supports staff in developing this competence in the following ways:

- A mentoring system, where staff new to visits assist and work alongside experienced trip leaders before taking on a leadership role.
- Supervision by Senior staff of some educational visits
- Support for staff to attend training courses relevant to the role of visit leader

In deciding whether any member of staff is competent to be a Visit Leader the Head Teacher will take into account the following factors:

- Level of relevant experience
- Any relevant training undertaken.
- The emotional and leadership ability of any prospective visit leader to make dynamic risk management judgements and take charge of any emergencies that may arise.
- Knowledge of the pupils, the venue and the activities to be undertaken.

## 8. Requirement to Ensure Effective Supervision

Health and Safety laws do not prescribe activity specific staffing ratios, but it does require that the level of supervision and group management is 'effective'.

Surfleet Primary School will assess/determine effective supervision by proper consideration of:

- Staff competence.
- Activity – nature and location of the activity (including the type of activity, duration, skill levels involved).
- Group – age (including the development age) of the group, ability of the group (including special learning needs, behaviour, medical and vulnerability characteristics etc.).
- Environment – nature and location of the activity including the type of the activity, duration, skill levels involved, as well as the time of year and prevailing conditions.
- Distance away from base.

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

The Visit Leader should follow OEAP National Guidance 4.3b Ratio and effective supervision

<http://oeapng.info/downloads/download-info/4-3b-ratios-and-effective-supervision/>

and 4.3c Risk Management <http://oeapng.info/downloads/download-info/4-3c-risk-management/>

## 9. Emergency procedures

**A critical incident is any incident where events go beyond the normal coping mechanisms and experience of the visit leadership team.**

Surfleet Primary School has an emergency plan in place to deal with a critical incident during a visit (see Appendix 2). All staff on visits are familiar with this plan and it is tested at least bi-annually and following any major staffing changes. See also <http://oeapng.info/downloads/good-practice/>

When an incident overwhelms the establishment's emergency response capability; where it involves serious injury or fatality or where it is likely to attract media attention then assistance will be sought from Lincolnshire county Council.

Surfleet Primary School will practice their response to emergency situations on educational visits at regular intervals i.e. School inset training.

## 10. Visit Planning

The Visit Leader checklist – National Guidance document 3.3e <http://oeapng.info/visit-leader/> is an important check on the planning of a visit. When a Visit Leader cannot answer yes to a question on this checklist there should be a discussion with the EVC and or Head of School/Teacher. In addition the following steps must be completed for any visit:

- Gain outline approval from the Head Teacher to begin planning the visit and agree funding mechanism / charging policy.
- Ensure the visit:
  - has clear learning outcomes
  - has activities appropriate to the group
  - is planned to maximise benefits to the pupils while managing significant risks
  - is appropriately staffed



# Educational Visit Policy

- complies with the School's safeguarding policy
- Involve pupils in the planning of the visit, and how it will be managed, wherever possible.
- Ensure emergency procedures include what would happen in the event of illness or injury affecting the visit leader.
- Ensure the base contact back at School is fully briefed and has copies of all relevant information.
- Ensure that the visit is correctly approved and recorded.

## 11. Risk Management

The risk management of an activity/visit should be informed by the benefits to be gained from participating. YMD Boon Ltd recommends a "Risk-Benefit Assessment" approach, whereby the starting point for planning should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained, through participation, provides some objectivity to a decision that any residual risk (i.e. the risks remaining after control measures have been put in place) is "acceptable". The Health and Safety Executive endorse this approach through their "***Principles of Sensible Risk Management***" and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is a legal requirement for the risk assessment process to be recorded and for suitable and sufficient control measures to be identified for any significant risks. There is no legal requirement to produce this risk assessment record in a particular format but academies and visit leaders should use the format that has been identified in the School risk assessment procedure and follows the Health and Safety Executives guidance on risk assessment <http://www.hse.gov.uk/pubns/indg163.htm>

See National Guidance on good practice for risk management <http://oeapng.info/downloads/good-practice/>

## 12. Parental Consent

Some visits do not require consent, all the rest can be covered by a combination of blanket consent (with subsequent information to parents) and visit specific consent - See the National Guidance document 4.3d on consent <http://oeapng.info/downloads/all-documents/>. It is advisable that all parents/guardians are advised of educational trips and permission obtained for visits which take place off the School site.

## 13. Monitoring

The Visit Leader should undertake an evaluation of each educational visit and submit this to the EVC, Head of School/Executive Head.

## 14. Inclusion

All academies must follow the National Guidance on inclusion see 3.2e <http://oeapng.info/downloads/all-documents/>

## 15. Charging / funding for trips

All academies must follow the National Guidance on charging for School trips 3.2c <http://oeapng.info/downloads/all-documents/>

## 16. Transport

All academies must follow the National Guidance on Transport for School trips see 4.5a transport, 4.5b minibuses, 4.5c Transport in private cars and 4.5d seat belts <http://oeapng.info/downloads/all-documents/>

## 17. Insurance

Insurance cover for approved educational visits is usually provided by the School insurance provider (public liability) insurance policy. However, as academies may have moved to different insurance providers when they moved away from local authority control confirmation/checks should be made with the insurance provider before the visit takes place. See National Guidance 4.4c Insurance <http://oeapng.info/downloads/all-documents/>

# Educational Visit Policy

## Appendix 1

### School Learning Area

#### General

This operating procedure applies to visits within the School Learning Area. It covers:

- a. Visits / activities that are part of the normal curriculum and take place during the normal School day. These do not require parental consent.
- b. All other visits / activities within the Learning Area (those that take place beyond the School day or are not part of the curriculum) are covered by blanket consent but parents will be informed in advance and given the opportunity to withdraw their child.

These visits/activities:

- Do not normally need additional risk assessments / controls beyond following the operating procedure below. However, where a specific risk is identified because, for example, a particular pupil's needs then a review of the individual pupils risk assessment should be made and a record kept.

#### Boundaries

The boundaries of the School Learning Area includes, but is not limited to, the following frequently used venues: e.g.

- Glen Park
- St Laurence's Church
- The War Memorial

#### Operating Procedure for School Learning Area

**The following are potentially significant issues/hazards within our School Learning Area:**

- Road traffic.
- Other people / members of the public / animals.
- Losing a pupil.
- Uneven surfaces and slips, trips, and falls.
- Weather conditions.
- Activity specific issues when doing environmental fieldwork (nettles, brambles, rubbish, etc).

**These are managed by a combination of the following:**

- The Head of School must give verbal approval before a group leaves.
- Only staff judged competent to supervise groups in this environment are approved. A current list of approved staff is maintained by the EVC and office.
- The concept and Operating Procedure of the 'School Learning Area' is explained to all new parents when their child joins the school, and a synopsis is in the School Prospectus.

## Educational Visit Policy

- There will normally be a minimum of two adults. Staff are familiar with the area, including any 'no go areas', and have practised appropriate group management techniques.
- Pupils have been trained and have practised standard techniques for road crossings in a group, which is one child behind the other, crossing 'on mass' after a count to 3.
- Where appropriate, pupils are fully briefed on what to do if they become separated from the group.
- All remotely supervised work in the School Learning Area is done in 'buddy' pairs as a minimum.
- Pupils' clothing and footwear is checked for appropriateness prior to leaving school.
- Staff are aware of any relevant pupil medical information and ensure that any required medication is available.
- Staff will deposit in the office a list of all pupils and staff, a proposed route, and an estimated time of return
- A staff mobile is taken with each group and the office have a note of the number.
- Appropriate personal protective equipment is taken when needed (e.g. gloves, goggles)

# Educational Visit Policy

## Appendix 2

### Emergency procedure

The school's emergency response to an incident is based on the following key factors:

1. There is always a nominated emergency base contact number for any visit (during School hours this is the main school number).
2. This nominated base contact person will either be an experienced member of the senior management team or will be able to contact an experienced senior manager at all times.
3. The visit leader(s) and the emergency base contact will both have relevant medical and emergency contact information on all the visit participants, including staff.
4. The visit leader(s) and the base contact know to request support from Lincolnshire County Council in the event that an incident overwhelms the establishment's emergency response capability; involves serious injury or fatality or where it is likely to attract media attention.
5. The School has personalised National Guidance emergency action cards and the appropriate cards are held by:
  - a. The visit leader(s) <http://oeapng.info/downloads/download-info/4-1d-8-1d-visit-leader-emergency-action-card>  
The visit leader should also have a copy of the visit leader emergency checklist <http://oeapng.info/downloads/download-info/4-1k-visit-leader-emergency-checklist/>
  - b. The first point of contact (*e.g. the office or Head Teacher*) <http://oeapng.info/downloads/download-info/4-1e-8-1e-first-contact-emergency-action-card/>
  - c. The designated emergency contact senior manager <http://oeapng.info/downloads/download-info/4-1f-8-1f-establishment-management-emergency-action-card/>
6. This emergency procedure is tested through both desk top exercises and periodic scenario calls from Visit Leaders.