



## EDUCATIONAL VISITS' POLICY





## EPT Document Control

This policy applies to all Education Partnership Trust Schools.

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## 1. Importance of Off-site Visits

We believe that educational visits 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 Heights* a supportive and effective learning environment.

Supporting Off-site visits and Adventurous Activities across the school is a key driver in engaging, inspiring and enthusing young people, enabling learning and development through real life experiences and helping all our young people to realise their potential. The school remains committed to promoting such experiences and recognises the impact and value they can have on children and young people's learning and development.

The benefits of children 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. Students are active participants and 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

## **2. Purpose, Status & Remit**

This document outlines the school policy and procedures for Off-site visits. It includes the use of standard operating procedures and generic risk assessments for local, routine visit in order to reduce bureaucracy and help support staff to manage visits in a simple and effective way. The level of planning should be proportionate to the complexity of the visit.

Any visit that leaves the school grounds, whether as part of the curriculum, during school time or outside the normal school day, is covered by this policy. This excludes local, routine sports fixtures and off-site swimming lessons where separate policies and procedures are in place (eg the BwDBC School Swimming Policy). Where no policies and procedures are in place for such activities then this policy should be followed.

All staff are required to plan and execute visits in line with this policy. Staff are particularly directed to be familiar with the roles and responsibilities of key staff.

This policy must be approved by Trustees and should be reviewed on an annual basis or when required in response to any incident or lessons learned.

## **3. BwDBC Requirements for Off-site Visits & Adventurous Activities and OEAP National Guidance**

*The Heights* adopts the majority of 'BwDBC Requirements for Off-site Visits and Adventurous Activities' which is available in the 'Guidance' section on the BwDBC EVOLVE website.

All staff are required to plan and execute visits in line with the 'BwDBC Requirements for Off-site Visits and Adventurous Activities'.

The 'BwDBC Requirements for Off-site Visits and Adventurous Activities' is underpinned by the National Guidance [www.oeapng.info](http://www.oeapng.info) .

## **4 Evolve**

EVOLVE ([www.blackburnvisits.org](http://www.blackburnvisits.org)) is the web based planning, notification, approval, monitoring and communication system, used by BwDBC.



All staff leading or accompanying visits should have an EVOLVE login giving access to the BwDBC EVOLVE website. Staff requiring a login should see the EVC (Educational Visits Coordinator) who is able to set up logins for staff.

Staff should see the section in this document named 'Types of Visits' for details of what needs to be recorded on EVOLVE.

All relevant BwDBC guidance is available on EVOLVE.

## **5 Roles and Responsibilities**

### **5.1 Visit Leaders**

Visit Leaders are responsible for the planning of visits but should involve both accompanying staff and pupils in this process.

Staff must not sign any contracts; enter into any agreements; pay any money or deposits; or advertise visits with pupils until outline permission has been obtained from the Principle.

Staff must make appropriate checks of any third party providers.

Visit Leaders should refer to:

- Section 5.1 of the 'BwDBC Requirements for Off-site Visits and Adventurous Activities'
- The Visit Leader Checklist from the National Guidance

### **5.2 EVC (Educational Visits Coordinator)**

The EVC is David Stafford.

Date of the last EVC training course attended **13/11/14**. (This should be within the last 3 years - the EVC should attend a full BwDBC EVC training day, and thereafter attend EVC update training at least once every 3 years).

The EVC will support and challenge colleagues over visits. 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 head/senior manager for approval.

The EVC should refer to:

- Section 4 of the 'BwDBC Requirements for Off-site Visits and Adventurous Activities'
- The EVC Checklist from the National Guidance

### **5.3 The Headteacher**

The Headteacher has responsibility for monitoring and final approval of all visits.

The Headteacher should refer to:

- Section 5.3 of the 'BwDBC Requirements for Off-site Visits and Adventurous Activities'
- The Head or Manager Checklist from the National Guidance

## **4. Trustees**

The Trustees will be informed of Level 1 and Level 2 visits on a termly basis along with Level 3 visits that have been given blanket approval. They will be informed of other Level 3 visits prior to them taking place. Visits are included on the agenda of Trustees meetings allowing board members to fulfil their role as 'critical friend' in the scrutiny of all visits and in particular Level 3 visits.

Trustees will review and approve this policy on an annual basis and will maintain an overview and monitoring role to ensure that all visits are carried out in accordance with this establishment policy and the 'BwDBC Requirements for Off-site Visits and Adventurous Activities'.

The Trustees should refer to:

- Section 5.4 of the 'BwDBC Requirements for Off-site Visits and Adventurous Activities'
- The Trustees and Governor Checklist from the National Guidance
- The Member of a Trustees or Governing Body - responsibilities

## 6. Staff Competence

We realise that staff competence is the single most important aspect of safe visit management and so we support staff in developing this competence in the following ways:

- An apprenticeship system, where staff new to visits assist and work alongside experienced visit leaders before taking on a leadership role
- Supervision by Senior staff of more complex visits where appropriate
- Regular CPD for all staff involved with visits, including: risk management, emergency procedures, visit leader training, group management and first aid

In deciding whether any member of staff is competent to be a visit leader the Headteacher will take into account the following factors:

- Level of relevant experience
- Any relevant training undertaken (including any relevant qualifications – eg hill walking)
- The emotional and leadership ability of any prospective visit leader to make on-going risk management judgements and take charge of any emergencies that may arise.
- Knowledge of the children, the venue and the activities to be undertaken

Accompanying staff should have clearly defined roles, be involved in the planning process and be competent to carry out the roles to which they are assigned.

## 7. Types of Visits

There are three types of visits:

- Level 1
- Level 2
- Level 3

See the table below for further details.

## 8. Visit Planning and Approval

Table 1	Definition of visit	Do these visits need to be recorded on EVOLVE?	Approval process
Level 1	<p><b>Local, routine, low risk</b></p> <p>Within 30 miles of the borough (Please see the Level 2 definition to help clarify. If in doubt then count it as a Level 2)</p>	<p><b>No</b></p> <ul style="list-style-type: none"> <li>• <a href="#">EV1 Form</a></li> <li>• One-off 'whole time at establishment consent'</li> <li>• generic risk assessment (Reducing paper work while maintaining a proportionate level of planning)</li> </ul>	<p><b>MUST BE SUBMITTED 7 DAYS BEFORE THE VISIT</b></p> <ul style="list-style-type: none"> <li>• Although all visits should be part of a planned programme it is recognised that some visits may need to take place at short notice, alternatively blanket approval may be appropriate for certain types of visits – please see the EVC for further details.</li> <li>• Provisional agreement should be obtained from the Headteacher before any commitment is made.</li> <li>• Checked and submitted by EVC</li> <li>• Approved by Principle (delegated approval from Trustees/LA)</li> <li>• Visit form completed on Evolve by visit leader</li> <li>• All planning documentation must be attached to the Visit Form on EVOLVE (Including: itinerary, any specific risk assessments, parental info letters, parental meeting presentations, any info from providers, any other relevant info)</li> </ul>

<p><b>Level 2</b></p>	<p><b>Out-of-borough – approximately over 30 miles non-routine</b>          (Any visit involving travel outside Blackburn with Darwen) that is over 30 miles</p> <p><b>Or</b></p> <p><b>In-borough trips that are of a more complex nature</b>          (eg large scale sponsored walk; night time theatre visit; involvement in a large scale public event/ gathering)</p>	<p><b>Yes</b></p>	<p><b>MUST BE SUBMITTED 7 DAYS BEFORE THE VISIT</b></p> <ul style="list-style-type: none"> <li>• <b>Provisional agreement should be obtained from the Headteacher before any commitment is made – using the <u>Visit Proposal Form (VPF)</u></b></li> <li>• <b>Visit Form completed on EVOLVE by Visit Leader</b></li> <li>• <b>All planning documentation must be attached to the Visit Form on EVOLVE</b> (Including: itinerary, any specific risk assessments, parental info letters, parental meeting presentations, any info from providers, any other relevant info)</li> <li>• <b>Checked and submitted by EVC</b></li> <li>• <b>Approved by Headteacher (delegated approval from Trustees/LA)</b></li> </ul>
<p><b>Level 3</b></p>	<p><b>Overseas Residential Adventurous</b></p>	<p><b>Yes</b></p>	<p><b>MUST BE SUBMITTED 6 WEEKS BEFORE THE VISIT</b></p> <ul style="list-style-type: none"> <li>• <b>Provisional agreement should be obtained from the Headteacher before any commitment is made – using the <u>Visit Proposal Form (VPF)</u></b></li> <li>• <b>Visit Form completed on EVOLVE by Visit Leader</b></li> <li>• <b>All planning documentation must be attached to the Visit Form on EVOLVE</b> (Including: itinerary, any specific risk assessments, parental info letters, parental meeting presentations, any info from providers, any other relevant info)</li> <li>• <b>Checked and submitted by EVC</b></li> <li>• <b>Authorised by the Headteacher</b></li> <li>• <b>Approved by Local Authority (overseen by Trustees)</b></li> </ul>

## 9. Planning a Visit – The Visit Leader’s Job List

Table 2	Planning a visit – the visit leader’s job list
All visits	<p><b>The visit leader will ensure the following steps are completed for all visits:</b></p> <ul style="list-style-type: none"> <li>• Obtain provisional agreement from the Headteacher before any commitment is made</li> <li>• Funding arrangements and charging policy agreed</li> <li>• Where practicable a pre-visit should be carried out to check suitability, gather information and to inform risk assessment and planning</li> <li>• Ensure the visit:             <ul style="list-style-type: none"> <li>○ Has clear learning outcomes</li> <li>○ Has activities appropriate to the group</li> <li>○ Is planned to maximise benefits to the children while managing significant risks</li> <li>○ Has effective supervision in place/ is appropriately staffed</li> <li>○ Has a designated deputy leader</li> <li>○ Complies with the safeguarding policy</li> </ul> </li> <li>• Record the visit plan on EVOVLE</li> <li>• The school's/service's Generic Risk Assessment for Off-site visits (see Appendix 1) must be implemented by staff for all visits. Where there are any additional significant risks they should be included in an Event Specific Risk Assessment, recorded on the EV5 Form and attached to the visit form (EV1 or on EVOLVE) - see Section 7.4 of this document.</li> <li>• Involve all staff in reviewing and writing the risk assessment and the planning</li> <li>• Involve children in the planning of the visit, and how it will be managed, wherever possible</li> <li>• Ensure parents are kept fully informed</li> <li>• Ensure appropriate consent is in place. ‘Blanket’ consent for Level 1 visits (‘life at the school’ consent). Specific consent for Level 2 &amp; Level 3 visits with the exception of the Outdoor Education programme that has blanket consent.</li> <li>• Plan and execute the visit in accordance with the ‘BwDBC Requirements for Off-site Visits and Adventurous Activities’.</li> <li>• Ensure all other staff, accompanying adults, children and any external provider are:             <ul style="list-style-type: none"> <li>○ Fully briefed about their roles and responsibilities during the visit</li> <li>○ Know what to do in the event of an emergency</li> <li>○ Are given information they need about individual pupil needs</li> </ul> </li> <li>• Fully brief the base contact back at school and ensure they have access to/ copies of all relevant information</li> <li>• Make suitable checks on any external providers. Where possible use providers with the <b>Learning Outside the Classroom Quality Badge</b> (see BwDBC Requirements for Off-site Visits &amp; Adventurous activities – Section 13.12)</li> <li>• Refer to <u>Visit Leader Checklist</u> from the National Guidance</li> </ul>

<p><b>Level 1, 2 &amp;3</b></p>	<ul style="list-style-type: none"> <li>▪ All Level 1, 2 &amp; Level 3 visits must be entered and approved on EVOLVE</li> <li>▪ Specific parental consent is required for Level 2 &amp; Level 3 visits except for the Outdoor Education programme.</li> <li>▪ All relevant information must be included. The following (where applicable) must be attached to the EVOLVE Visit Form:             <ul style="list-style-type: none"> <li>○ Itinerary</li> <li>○ Event-specific Risk Assessment/s (as required)</li> <li>○ Information provided to parents/pupils</li> <li>○ Parents meeting presentation (where applicable)</li> <li>○ Copy of EV4 (if required)</li> <li>○ Any other relevant information</li> </ul> </li> </ul> <p>This information must be available to view on EVOLVE before approval is granted.</p>
<p><b>Required for all visits</b></p>	<ul style="list-style-type: none"> <li>▪ Visit Leader holds the following:             <ul style="list-style-type: none"> <li>○ List of staff and young people on visit</li> <li>○ EV7 Emergency card (including 24hr Emergency Contact details where appropriate)</li> <li>○ First Aid kit</li> <li>○ Any other relevant documentation/items (eg medication/ contact details where appropriate)</li> </ul> </li> <li>▪ Emergency contact (at the base) holds the following:             <ul style="list-style-type: none"> <li>○ List of staff and young people on visit</li> <li>○ EV7, EV8a &amp; EV8b Emergency cards (Including Visit Leader contact details while on the visit)</li> <li>○ Any other relevant documentation (eg medical/ contact details)</li> <li>○ And should have 24/7 access to all Visit details and documentation</li> </ul> </li> </ul>

## 10. Guidance for Visit Leaders

**All Visit Leaders should be familiar with the 'Specific guidance for your role' (for Visit Leaders) which can be found by accessing the [OEAPNG website](#) and selecting the Visit Leader role on the right hand side of the page. This will bring up all relevant documents for the role of Visit Leader.**

The following OEAP documents may be of particular interest and can be found in the 'Specific guidance for your role' (for visit Leaders) section on the OEAPNG website.

- Visit or Activity Leader Responsibilities
- Visit Leader Checklist
- Group Management and Supervision
- Good Practice Basics
- Ratios and Effective Supervision

## 11. Parental Consent

Staff must ensure that appropriate consent is in place:

- 'Blanket' consent for Level 1 & Level 2 visits ( 'life at the school' consent).
- Specific consent for Level 2 & Level 3 visits and for visits that extend beyond the school day with the exception of the Outdoor Education programme.

## 12. Risk Management

**The school's Generic Risk Assessment for Off-site visits must be implemented by staff for all visits. Where there are any additional significant risks they should be included in an Event Specific Risk Assessment, recorded on the EV5 Form and attached to the visit form (EV1 or on EVOLVE).**

### Level 1 Visits

It is expected that routine, low risk visits (Level 1 visits) will be managed using the **generic risk assessment**.

For Level 1 visits, a routine check of the generic risk assessment to make sure the precautions remain suitable and sufficient is all that may be required. Where additional factors apply such as a group with unusually challenging behaviour; extreme weather; an inexperienced leader; then an event-specific risk assessment may be required to cover any additional issues.

### **Level 2 & Level 3 Visits**

For Level 2 and Level 3 (more complex) visits an event-specific risk assessment must be considered. Any additional significant issues must be recorded along with appropriate control measures. There is no need to repeat any issues already covered adequately on the generic risk assessment.

Please note any additional risk assessment must be attached to the EV1 or EVOLVE visit form for monitoring by the EVC and Principle before approval can be given.

### **On-going Risk Assessments**

This is what the staff do on a visit to keep the group safe – ‘*active risk management*’. It involves continuously assessing situations as they unfold and adjusting your response to effectively manage any issues/risks that may arise. This is not a written risk assessment.

All staff are responsible for carrying out effective on-going risk assessments based on competence, experience and common sense. Staff teams must be suitably competent and experienced so that they are able to effectively manage any situations they are likely to encounter on the visit.

### **What to consider when carrying out an Off-site visit risk assessment**

When considering whether there are any significant risks that need managing it is recommended that staff use the following model:

#### **STAGED:**

- S**taffing (Including competence, experience, ratios, effective supervision)
- T**imings (Timings, itinerary, downtime)
- A**ctivities (Programme, activities to be undertaken.  
Who will lead? Adventurous?)
- G**roup (Additional needs: learning, behaviour, disabilities, medical.  
Challenging group?)
- E**nvironment (Venue, accommodation, weather, water levels, crowds,  
other users, culture)
- D**istance from base (Including transport arrangements, support systems,  
residential visits, visits abroad)

## Procedures for Risk Management:

1. All staff must be familiar with and use the **Generic Risk Assessment** for all visits.
2. Any additional significant risks that are not covered by the generic risk assessment must be recorded on an **Event Specific Risk Assessment** (on an EV5 Form)
3. When completing the risk assessment/ planning the staff should ask the following question:

### ***What are the really important things we need to do keep the group safe?***

4. The **On-going Risk Assessment** is really important – this is what the staff do during the visit to keep the group safe (see the Ongoing risk assessment section above)
5. All staff have a responsibility to review risk assessments after every visit, including the generic risk assessment. If there are any issues with the generic risk assessment then staff should bring them to the attention of the EVC immediately.
6. All staff going on the visit should be involved in the planning process which should include the checking and writing of any risk assessments. The visit leader should take the lead with the planning but as a rule should not complete risk assessments on their own. Ideally risk assessments will be the product of discussions between the staff team.
7. Young people should be included in the risk assessment process where appropriate. This can help them learn how to managing risk for themselves.
8. All staff, volunteers and young people must be briefed appropriately regarding the risk assessments prior to departure.
9. Staff only need to record **significant risks**. Risk assessments should be proportionate, simple and easy to use.
10. Where an external provider is being used, the provider has responsibility for risk assessing and managing the activities they deliver. Visit Leaders should **not** ask for copies of providers' risk assessments. It is appropriate, however, to ask for

any information that they publish that is specifically aimed at helping Visit Leaders to manage their visit.

### **13 Monitoring**

The role of monitoring is shared between the EVC, the Headteacher, the staff and the Trustees. The checking and approval process is a very important part of the monitoring process and is shared between the EVC, Head and Trustees.

Field monitoring is also recognised as important and staff are encouraged to peer monitor and give feedback to colleagues. In addition the EVC, Headteacher or other experienced senior staff should carry out monitoring visits from time to time in order to support staff and encourage good practice.

Staff are encouraged to evaluate visits using the form on Evolve. This will be monitored by the EVC, used for future planning and training and reported to the Principle on a termly basis.

### **14 Induction, Training, Apprenticeship, Succession Planning**

New staff are trained by the EVC so that they are familiar with the procedures for Off-site Visits as part of their induction. This is included and recorded as part of their induction programme.

The EVC should attend a full BwDBC EVC training day, and thereafter attend EVC update training at least once every 3 years.

All staff should complete the BwDBC Visit Leader (Part 1) training. This is delivered by the School Consultant for Learning Outside the Classroom and includes training in risk management.

An apprenticeship model should be used so that inexperienced staff can shadow experienced and competent visit leaders until they are ready to lead visits themselves. This model also allows for effective succession planning.

Training records are kept by the EVC.

Records of any relevant staff qualifications (eg Mountain Leader Award or First Aid qualification) including a scanned copy of the certificate should be saved on the



member of staff's profile on EVOLVE. (See Section 16 of the BwDBC Requirements for Off-site Visits & Adventurous Activities).

## 15. Assessing Venues and External Providers

**To confirm that all aspects of the operation of the provider are satisfactory, the establishment must ensure that either:**

A) The Provider holds an LOtC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**OR**

B) An **EV4 Provider Form** has been satisfactorily completed by the provider

Note: If a Provider holds an **ALA licence** (and/or any other accreditation) but not an LOtC Quality Badge, then an EV4 Provider Form is still required.

Visit Leaders should not ask for:

Where an external provider is being used, the provider has responsibility for risk assessing and managing the activities they deliver. Visit Leaders should **not** ask for copies of providers' risk assessments. It is appropriate, however, to ask for any information that they publish that is specifically aimed at helping Visit Leaders to manage their visit.

## 16. Volunteers

Volunteers will require a Criminal Record Check if they are involved in a regulated activity. Staff should discuss this with the EVC and the 'Designated Person' (DP) to establish if a check is required. Criminal Record Checks are now carried out by the DBS (Disclosure and Barring service).

Volunteers should be inducted/ briefed and assessed as competent to carry out their assigned role. They will also require supervision by staff.

## 17. Emergency Procedures

The BwDBC Emergency procedures for visits can be found on the home page of the [BwDBC EVOLVE website](#) (select the Emergencies link on the red band).



In the event of an incident staff must use the EV7, EV8a and EV8b – by doing so staff will be led through the correct procedure.

Both the visit leader and the base contact should have 24/7 access to all the details of the visit, including medical and next of kin information for both the staff and the young people.

The visits emergency procedures should key into the school's emergency planning.

## **18. Behaviour**

Young people will be expected to follow a code of conduct while on Off-site Visits. Where possible the young people will be involved in setting them up so that they can retain some ownership. On occasions parents may be asked to sign the code of conduct as well. Expectations are covered by the home/school agreement that is completed at the induction stage.

Careful thought will be required to determine how mobile phones and other electronic devices will be managed.

## **19. Inclusion**

The school ethos supports inclusions in all areas of school including visits. We encourage integration through participation with peers.

All visits must comply with the Equality Act 2012.

Staff must plan early to overcome any inclusion issues. Reasonable adjustments must be made to accommodate any young person with disabilities as long as the adjustments don't unduly impinge on the rest of the group.

Expectations of staff accompanying visits must be realistic, so that what is required of them is within their competence and is reasonable.

Staff should discuss any issues with the EVC, the SENCO and where appropriate the BwDBC Inclusion Support Team. The views of the young person and the parent/ carers should be included in the discussion.

## **20. Insurance**

Insurance is provided through the EFA Risk Protection arrangement.

## **21. Finance**

There are clear procedures for staff to follow including:

- Initial approval of financial plans/costings using the educational visits proposal form.
- All accounting, banking and reporting should be arranged through the business manager.
- Appropriate contingency to be built into the proposed cost.
- The management of 'voluntary contributions'
- Arrangements for young people unable to afford a visit to be discussed and agreed with SLT.

## **22. Transport**

We follow the guidance in the Transport section of the BwDBC Requirements for Off-site Visits & Adventurous Activities – Section 13.15.

## **23. First Aid Arrangements**

All visits to have a qualified first aider and where visits take place in remote areas, a two day outdoor first aid qualification must be held.