



The Federation of Boldmere Schools

Educational Visits Policy

Policy and Guidance for Educational Visits and Learning Outside the Classroom

1. Provision of Employer Guidance

Birmingham City Council (“the Council”) has formally adopted “***Outdoor Education Advisers Panel National Guidance for the Management of Outdoor Learning, Off-site Visits and Learning Outside the Classroom***”. This guidance can be found on the following web site:

www.oeapng.info

This does not preclude schools implementing alternative arrangements based on local circumstances and outcome of risk benefit analysis.

Anybody involved in educational visits and learning outside the classroom is strongly advised to read this policy before seeking information from the oeapng website.

It is a legal expectation that employees **must** work within the requirements of their employer’s policy and guidance. Birmingham City Council employees must follow the requirements of ‘Outdoor Education Advisers Panel National Guidance’, as well as the requirements of this document.

Another employer such as the governing body of a voluntary aided school or academy Trust may wish to opt into the Council policy and guidance including systems and processes for supporting and monitoring educational visits and learning outside the classroom activities. **They should produce a policy statement that makes this clear.**

Where a Council employee commissions an educational visit or learning outside the classroom activity, they must ensure that the provider has either:

1. adopted the Council Policy and Guidance and the OEAP National Guidance

Or

2. have systems and procedures in place where the standards are as robust as those required by the OEAP National Guidance.

2. Scope and Remit

The OEAP National Guidance document: 1c “**Status and Remit and Rationale**” clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of children and young people undertaking experiences beyond the boundary of their normal classroom or environment;
- direct supervision of children and young people undertaking experiences that fall within the remit of learning outside the classroom;
- facilitating experiences for children and young people undertaking experiences beyond the boundary of their normal classroom or environment;
- deploying staff who will supervise or facilitate experiences for children and young people undertaking experiences beyond the boundary of their normal environment;
- this guidance may be applicable for all those supervising vulnerable adults as there is a transfer of good practice for the wider use of educational visits;

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAP National Guidance document: 3.2a “**Underpinning Legal Framework and Duty of Care**”

3. Ensuring Understanding of Basic Requirements

As an employer, the Council is required to ensure that its employees are provided with [This also applies to other employers who opt into this policy and guidance]:

- access to appropriate guidance relating to educational visits and learning outside the classroom activity;
- access to appropriate training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed accredited advisers who have proven expertise and professional understanding of the guidance.

The relevant training courses are:

1. Educational Visit Coordinator (EVC) Training - all Birmingham schools; academies; other educational establishments; and other private, voluntary or independent establishments; i.e. those working in partnership with BCC are required to have a current trained EVC in post. If an establishment does not delegate the responsibility for educational visits and learning outside the classroom to a nominated trained EVC, then that role will rest with the Executive Head Teacher or Head of school of the establishment by default. The Executive Head Teacher or Head of school should therefore undertake EVC training.

2. Educational Visit Coordinator (EVC) Revalidation - all Birmingham schools; academies; other educational establishments; and other private, voluntary or independent establishments; i.e. those working in partnership with BCC are required to ensure that their EVC undertakes a revalidation every three years.

3. Visit Leader Training – this course is **strongly recommended** for all those who lead learning outside the classroom activities in Birmingham from October 2014. To meet OEAP National Guidance requirements regarding leader competence, leaders must be current in their knowledge of expectations of good practice, so update refresher training is also strongly recommended. Schools and other educational establishments may find training for visit leaders can more successfully be delivered to whole staff on training days. This training may be accommodated on request.

Information on how to access the relevant courses e.g. EVC and Visit Leader Training courses are available on the Safety Services web site or call number below

Telephone 0121 464 8564 Email; schoolsafety@birmingham.gov.uk

For the purposes of day-to-day updating of information, Birmingham EVCs and Visit / Activity Leaders are directed to the posting of "*EVC Briefing Updates*" also available on the above web site.

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their establishment's Educational Visits Coordinator (EVC), or the nominated Educational Visits/Outdoor Education Adviser.

4. Approval and Notification of Activities and Visits

The EVC/ Executive Head Teacher is responsible for approving each visit. Where school's / establishment's policies delegate these responsibilities and functions to others, this must be clear. This is important for the formal notification and approval processes.

Approval in principle should be sought from the EVC/ Executive Head Teacher as soon as possible before any financial commitment is made. Schools / Establishment policies will differ; organisers should check procedures and give adequate notice.

Birmingham uses a system of notification for all visits involving adventurous activities; all visits to 'wild country' and Duke of Edinburgh Award expeditions (refer to section 16). These visits **must** be notified to the Council using the form OE2005. Visits abroad must be notified to the Council (Overseas Visits Form OSV 2005). These are overseas and adventurous activities delivered by an external provider or by staff within the establishment. Non adventurous activities do not require notification e.g. visits to any museum, local parks, the theatre, theme parks such as Alton Towers. – Please contact the Education Visits Adviser if you are not sure.

Visits requiring notification to the Council should be submitted at least 4 weeks prior to the day of the visit wherever possible. However, in the case of complex visits such as expeditions abroad support should be sought.

Note: The Youth Service has a separate notification approval process.

Forms for Adventurous Activities and Overseas Visits should be submitted to

Email; schoolsafety@birmingham.gov.uk

Safety Services (WS)

P.O. Box 15630

Birmingham

B2 2QF

Tel. 0121 464 8564 11

5. Risk Management

The employer has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level. This requires that suitable and sufficient risk management systems are in place, requiring the employer to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. The Council strongly recommends a "Risk-Benefit Assessment" approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. HSE 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 requirement for the risk assessment process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to individuals. EVC Training ensures that establishments are supplied with electronic generic risk-benefit assessments for educational visits and learning outside the classroom. Further exemplar event-specific assessments, risk management materials and advice are available by contacting the Educational Visits Adviser.

It is strongly recommended that establishments adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of learning outside the classroom learning opportunities.

Refer to OEAP National Guidance document: 4.3c ***“Risk Management”***

6. Emergency Planning and Critical Incident Support

A critical incident is an incident where any member of a group undertaking an educational visit or learning outside the classroom activity has either:

- suffered a life threatening injury or fatality;
- is at serious risk;
- or has gone missing for a significant and unacceptable period.

Schools must have emergency planning procedures in place in the event of a critical incident. Every visit leader and assistant leader must be familiar with emergency planning procedures and reporting mechanism. This forms part of the training delivered to EVCs and visit leaders.

Relevant emergency contact telephone numbers should be carried by leaders at all times during an offsite educational visit but should only be used in the case of a genuine emergency. Under no circumstances should these telephone numbers be given to young people or to their parents or carers.

To activate support from the Council, please refer to section 19, page 17. 12

Refer to OEAP National Guidance documents: 4.1a ***“Off Site Visit Emergencies: The Employer’s Role”*** 4.1b ***“Off Site Visit Emergencies: The Establishment’s Role”***; 4.1i ***“Emergencies and Critical Incidents – An overview”***

7. Monitoring and Quality Assurance

Schools and other education settings should ensure that there is sample monitoring of educational visits and learning outside the classroom activities undertaken. Such monitoring should be in keeping with the recommendations of OEAP National Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the EVC.

Refer to OEAP National Guidance document: 3.2b ***“Monitoring”***

8. Assessment of Leader Competence and Good Practice Requirements

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the Council Policy and Guidance that all leaders and their assistants have been formally assessed as competent to undertake the responsibilities of leading the educational visit or learning outside the classroom activity.

Refer to OEAP National Guidance document: 3.2d/4.4a ***“Assessment of Competence”***

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

All staff and helpers must be competent to carry out their defined roles and responsibilities.

OEAP National Guidance sets a clear standard to which leaders **must** work.

Staff participating in educational visits and learning outside the classroom activities must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff.

Where a Volunteer helper is a parent (or otherwise in a close relationship to a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment.

Refer to OEAP National Guidance document: 4.3a ***“Good Practice Basics”***

9. Charges for Educational Visits and Off-site Activities

Refer to OEAP National Guidance document: 3.2c ***“Charges for Off-site Activities and Visits in an Educational Establishment”*** 13

10. Vetting, DBS Checks and CRB Changes

The Disclosure and Barring Service (DBS) was established under the Protection of Freedoms Act 2012. The primary role of the DBS is to help employers make safer recruitment decisions and prevent unsuitable people from working with vulnerable groups including children and young people.

However, it must be clearly understood that a DBS check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of children, young people or vulnerable adults.

Careful consideration should be given to whether a voluntary helper may require a DBS Enhanced Disclosure. In general terms, those helpers with *frequent* or *intensive* contact e.g. working with a group or groups regularly or involved in accompanying a residential should be checked.

It is **essential** that the full contents of the document below are taken into account.

Refer to OEAP National Guidance document: 3.2g ***“Vetting Disclosure and Barring Service (DBS) Checks”***

11. Requirement to Ensure Effective Supervision

In general terms, the law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is effective when on educational visits and learning outside the classroom activities.

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

Refer to OEAP National Guidance document: 4.3b ***“Ratios and Effective Supervision”***

Refer to OEAP National Guidance document: 4.2d ***“Group management and Supervision”***

12. Preliminary Visits and Provider Assurances

All educational visits and learning outside the classroom activities should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group needs and expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

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.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

- The Learning Outside the Classroom Quality Badge
- AALS licensing
- Adventuremark
- Association of Heads of Outdoor Education Centres Gold Badge
- National Governing Body centre approval schemes (applicable where the provision is a single, specialist activity).

Where a provider holds one of the above accreditations, there should be no need to seek further assurances regarding risk assessments of the provider. Schools and Children’s Services establishments should ensure that leaders complete a risk benefit assessment and record any significant findings for any aspects of a visit that they are leading or responsible. This will usually include transport to and from the venue plus any stops or visits on route.

Refer to: OEAP National Guidance document 4.4h ***“Using External Providers and Facilities”***

13. Adventure Activities Licensing Regulations

Executive Head Teacher/ EVCs and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA). The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

Leaders should be aware that the AALS licence is an assurance of safety. It does not accredit educational or activity quality.

Refer to OEAP National Guidance document: 3.2f “**Adventure Activity Licensing Regulations**”

14. Insurance for Educational Visits and Off-Site Activities.

Non-delegable duty of care

In October 2013 the UK Supreme Court ruled that, in particular circumstances, schools and other public bodies have a non-delegable duty of care. This is an exception to the normal fault based principles of law. It means that, in these particular circumstances, schools and other organisations are liable to be sued for the negligence of a third party.

For example, a school contracts with a third party provider to deliver swimming lessons within school time. If, through the negligence of this third party, a child is injured, the child can sue the school and local authority for compensation. The fact that the school was not responsible for the actions of the third-party is irrelevant as; in this case, the school’s duty of care is non-delegable.

It is therefore important to ensure that any contracts entered into with third parties include terms to carry insurance including indemnity in the event of negligence as local authorities and schools will need to pursue independent third parties for an indemnity or contribution should any such claims succeed.

Employer’s Liability Insurance

Employer’s Liability Insurance is a statutory requirement. The Council holds a policy that indemnifies it against its legal liability in respect of all claims for compensation resulting in bodily injury suffered by any Council employee and employees in schools maintained by the Council. As this type of policy is a statutory requirement any other employer should hold a similar policy in respect of its employees. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors.

Schools which achieve Academy status will be obliged to make their own insurance arrangements outside of the Council’s portfolio of covers. 15

Public Liability Insurance

The Council also holds Public Liability Insurance, indemnifying it against its legal liability in respect of claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property. Employees (as agents of the employer) are indemnified under the policy, as are voluntary helpers acting under the direction of the employer’s staff. The indemnity covers activities such as educational visits and off-site activities including school sports, together with approved extracurricular activities organised by all establishments and settings for which the employer is responsible.

Employees

The Council operates an Employees Personal Accident Scheme. Cover under this section is provided for all Council employees and employees in schools maintained by the Council, in the course of their employment, providing predetermined benefits in the event of an accident. The scheme's benefits are designed to provide compensation for injury where the employer is not deemed negligent. The Personal Accident Scheme provides cover for all full and part-time employees. Details of the scheme may be obtained from the appropriate staffing section within Human Resources.

Insurance for Pupils

The Council only covers accidents to pupils when due to its negligence and these claims are covered within its Public Liability Insurance detailed above. Personal Accident Insurance for pupils is not arranged by the Council but may be arranged by the school direct; however there is no statutory requirement for governors to arrange this cover. The cost of Personal Accident Insurance arranged by the school may be recharged to parents. Parents should be reminded that the Council does not insure children's belongings.

For journeys/visits overseas, Governing Bodies **must** insist that Foreign Travel Insurance is arranged that covers **all persons on the visit**. This is especially important, due to the high costs of medical care abroad and possible repatriation expenses in the event of an accident or illness.

For all journeys within the United Kingdom Governing Bodies should decide whether or not they require insurance to be arranged, having regard to the nature of the journey and the capabilities of the pupils involved. In all cases, reference should be made to the Council's guidelines governing educational visits, before final decisions are made.

Schools should notify insurers if the activity involves any form of winter-dangerous sports as the insurers may need to charge an additional premium.

If additional insurance is not taken out, it is recommended that parents are advised of this and a suggested wording for parental consent forms is detailed below:

"The school is insured against its legal liability to pay compensation should it be held responsible for causing an injury to your child whilst in our care.

The school has not taken out any additional insurance in respect of this visit e.g. personal accident, and, should you be concerned about this area of risk, you are advised to make your own personal arrangements".

It must be remembered that the Council's public liability arrangements apply for all school organised activities, including visits within the UK and abroad (unless schools choose to purchase insurance from an alternative provider).

Visit and activity leaders should contact the Council's Insurance Section to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer.

They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Schools should notify insurers if the activity involves any form of winter-dangerous sports as the insurers may need to charge an additional premium

The number for the Insurance section is 0121 303 4829 or 0121 303 3288

Reference can also be made to the Schools Financial Procedures Manual

Refer to OEAP National Guidance document: 4.4c ***“Insurance”***

15. Inclusion

Every effort should be made to ensure that educational visits and learning outside the classroom activities are available and accessible to all, irrespective of special educational or medical needs, disability, ethnic origin, gender, sexuality or religion. If a visit needs to cater for children and young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Establishments should take all *reasonably practicable* measures to include all children and young people, unless risk assessment determines otherwise. In accordance with the Equality Act 2010 the principles of inclusion should be promoted and addressed for all visits and reflected in the establishment's policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Refer to OEAP National Guidance document: 3.2c ***“Inclusion”***

16. Duke of Edinburgh Award

The Duke of Edinburgh Award (DofE) is available through schools, local youth clubs and voluntary organisations around the City.

All schools wishing to deliver the DofE must be a Directly Licenced Centre with the DofE and responsibility lies with them for in accordance with their licence with the DofE.

Where DofE expedition activities are involved all appropriate external and internal notifications and approvals should be gained. A DofE Expedition is notifiable as an adventurous activity.

Advice can be sought from the Outdoor Education and Educational Visits Adviser.

The Regional D of E office can offer help and advice.

There are separate Council guidelines for D of E which can be found on the Birmingham Education Partnership website.

You can also refer to the OEAP National Guidance Document: 7b ***“Duke of Edinburgh's Award Expeditions”***

17. Transport

Careful thought must be given to planning transport to support educational visits and learning outside the classroom (off-site) activities. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it. All national and local regulatory requirements **must** be followed.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

Refer to OEAP National Guidance document: 4.5a ***“Transport: General Considerations”***

Refer to OEAP National Guidance document: 4.5b ***“Transport in Minibuses”***

Refer to OEAP National Guidance document: 4.5c ***“Transport in Private Cars”***

18. Planning and Consent

Planning should reflect your establishments’ procedures, employers’ requirements, legal requirements and good practice requirements. It is critical part of the Risk Benefit assessment and management process that this document is referred to:

Refer to OEAP National Guidance document: 5.2b ***“Planning Basics for Outdoor learning, Offsite Visits and Learning Outside the Classroom”***

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as **‘SAGED’** and include:

- **Staffing** requirements – trained? experienced? competent? Ratios?
- **Activity** characteristics – specialist? insurance issues? Licensable?
- **Group** characteristics – age? prior experience? ability? behaviour? special and medical needs?
- **Environmental** conditions – like last time? impact of weather? water levels?
- **Distance** from support mechanisms in place at the home base – transport? residential?

To reduce bureaucracy and encourage activity, establishments need to take account of the legalities regarding a requirement for formal consent. When an activity is part of the establishment’s curriculum or normal working practices and no parental contributions are requested, there may not be a need for specific parental consent. However, in the interests of good relations between the establishment and the home, it is good practice to ensure that those in a position of parental authority are fully informed. Consent forms are often used to update parent’s/carer’s current phone numbers, contact details plus any medical conditions which have developed since the last check.

It is good practice to obtain blanket parental consent for a range of regularly occurring activities or a specific programme.

It is also good practice to develop *activity-specific* policies at establishment level for regular or routine activities. Such policies should be robust and equate to *“operational guidance”* that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The subject of obtaining consent is a matter for individual school / establishment discretion provided they comply with law.

Refer to OEAP National Guidance document: 4.3d **“Consent”**

19. IN THE EVENT OF A CRITICAL INCIDENT (during school hours)

First point of contact: Executive Head Teacher/ Head of School will contact.

Dave Yardley, School Support manger (North)

Tel: 0121 464 3174 Mobile: 07881 617187

Kathy McDonough, Acting School Support

Tel: 0121 303 2193 Mobile: 07775 407332

David Bridgman, School Support Manager, South

Tel: 0121 303 8394 Mobile: 07771 339061

If not available, contact:

Amanda Daniels, Head of Educational Psychology

Tel: 0121 464 1364 Mobile: 07766 925152

For all critical incidents outside of normal school hours please phone the Press Office out of hours number:0121 303 3287. The Press Officer on duty at the time will contact relevant People Directorate personnel.

This applies to all schools and establishments within the Directorate for People. Other educational establishments (including academies) must have their own critical incident plan.

Further information from the Council can be found in ‘BCC Guidance - Critical Incidents Management; Guidance for Schools Jan 2016’

20. Other Important Contact Numbers

schoolsafety@birmingham.gov.uk

Safety Services (WS)

P.O. Box 15630

Birmingham

B2 2QF

Tel. 0121 464 8564

Educational Visits Adviser: Tom Lilley 07980266367 1

Boldmere Schools are committed to safeguarding and promoting the wellbeing of all children and expects its staff and volunteers to do the same.

Other Supporting Documents1

APPROVAL CHECKLIST 3 OVERSEAS VISITS		
(FOR ESTABLISHMENT USE ONLY)		
Where visits abroad are planned and following the satisfactory completion of Checklist 1 (and Checklist 2 where appropriate), organisers should satisfy themselves of the following issues before any financial commitment is made.		
1.	Has Checklist 1 (and Checklist 2, where appropriate) been satisfactorily completed?	Yes/No
2.	Do staffing levels and experience conform to the guidelines in Section 2	Yes/No
3.	Have adequate checks been made on accommodation security and safety? (Section 10; paragraphs 20 - 23)	Yes/No
4.	On exchange visits: i. has the child protection guidance been followed? (Section 10; paragraphs 26 - 30) ii. are satisfactory child protection measures in place?	Yes/No
5.	Is all documentation in place (personal, medical, passports, insurance)? (Section 10; paragraphs 11 - 14)	Yes/No
6.	Have arrangements been made for dealing with emergencies? (Section 10; paragraphs 38 - 39)	Yes/No
7.	Where a travel operator is used, does it offer appropriate financial security? (Section 10; paragraphs 7 - 9)	Yes/No
8.	Have parents been fully informed of, and given their consent to, all the visit arrangements?	Yes/No
Signed _____ (Visit Leader)		Date _____
<i>If answers to all relevant questions above are affirmative, then establishment approval of the visits could reasonably be assumed.</i>		
Signed _____ (Head/EVC)		Date _____