



## **Educational Visits Policy**

**Enquire Learning Trust**  
**Ever Curious, Always Learning**

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## Version History

Date	Author	Version	Comment
August 2018	DH/LT	1	
August 2019	DH	2	Review and amend to reflect changes to Scheme of Delegation.

## 1. Introduction

We believe that educational visits are an integral part of the entitlement of every pupil 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 Enquire Learning Trust a supportive and effective learning environment. The benefits to pupils of taking part in visits and learning outside the classroom include, but are not limited to:

- Improvements in their ability to cope with change.
- 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 participants 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 in a range of contexts. ie. encouraging pupils to become more risk aware as opposed to risk averse.
- 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. Application

Any visit that leaves the school grounds is covered by this policy, whether as part of the curriculum, during school time, or outside the normal school day.

In addition to this Educational Visits Policy, The Enquire Learning Trust

1. Adopts National Guidance [www.oeapng.info](http://www.oeapng.info)
2. Uses EVOLVE, the web-based planning, notification, approval, monitoring and communication system for off-site activities. [www.stjohnsvisits.org.uk](http://www.stjohnsvisits.org.uk)

All employees are required to plan and execute visits in line with this school policy and National Guidelines. Employees are particularly directed to be familiar with the roles and responsibilities outlined within the guidance.

### 3. Types of Visit & Approval

There are three 'types' of visit:

**1. Visits/activities within the 'School Learning Area' that are part of the normal curriculum and take place during the normal school day.**

These follow the 'School Learning Area' Operating Procedure (Appendix 1).

**2. Other non-residential visits within the UK that do not involve an adventurous activity. Eg. visits to museums, farms, theme parks, theatres, etc.**

These are entered on EVOLVE by the visit leader and submitted to the EVC for checking. The EVC then submits to the Principal for approval.

**3. Visits that are overseas, residential, or involve an adventurous activity.**

These follow 2. above, but the Advisor may provide comment prior to passing on to the Principal for first approval. The trust will have the final approval on these trips.

#### 4. Roles and responsibilities

Refer to: 'Planning Basics' and 'Checklists' in National Guidance  
<http://www.oeapng.info>

##### The role of the Principal is to:

- Be satisfied that there is a declared and valid reason for the event. This is delegated to the team who approve visits on Evolve:
- The EVC and Vice Principal
- Adventurous activities and foreign trips need permission from the Principal following comment, if required by the Outdoor Adviser.
- Approve or reject the initial application for any high risk and foreign residential visit.
- Be satisfied that visits comply with the regulations and guidelines as promulgated in this policy, the ISI handbook for the Inspection of Schools, OEAP National Guidance, DfE Guidance 2011 Health and Safety Advice on Legal Duties and Powers for Local Authorities, Principal Teachers, Staff and School Improvement Committee and other supplementary guidance.
- Ensure that the Educational Visits Co-ordinator is competent to oversee the coordination of all off-site educational visits.

Refer to: 'Principal / Manager' in National Guidance <http://www.oeapng.info>

##### The role of the Vice Principal is to:

- Maintain an overview of the timing of all educational visits and how they integrate with other whole school events.
- Check that the proposed dates for the visit or activity are suitable by reference to the School's calendar of events.
- When approving the trip on Evolve, ensure that there are sufficient employees left in School to provide cover for emergencies and illness.

Refer to: 'Principal / Manager' in National Guidance <http://www.oeapng.info>

##### The role of the Educational Visits Co-ordinator (EVC) is to:

- Give advice for, and approve, each step of the planning stages for any trip for which the initial approval has been given.
- Ensure that all educational visits are planned meticulously using standardised forms which are uploaded onto Evolve
- Ensure that all employees involved in the planning and execution of a visit are aware of the guidelines available.
- Ensure that the Group Leader is competent and possesses the appropriate experience and training to undertake the activity
- Ensure that appropriate vetting of all employees and any volunteers accompanying the party has been checked for foreign and activity trips
- Ensure that visits have appropriate employee supervision and cover for health and safety, first aid, medication and behaviour management.
- Work with the Group Leader to provide full and timely details of the visit to parents and obtain their consent or refusal.
- Organise the emergency arrangements and ensure there is an emergency contact for each visit.
- Keep records of individual visits including reports of accidents or 'near misses'.
- Ensure that visit evaluation is used to inform future visits and employee training needs.
- Flag up any concerns with the Senior Team.

Refer to: 'Educational Visits Coordinator' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### The role of the Group Leader is to:

- Have full responsibility for the planning and safe conduct of the activity, in accordance with this policy and its supplementary guidance, and for ensuring all participants are aware of their roles. Leaders accompanying pupils are in 'loco parentis' and are responsible for their safety and well-being at all times.
- The Group Leader's duty is to exercise the higher level of care than that of a parent. Other supervising adults will also have a duty of care, but the Group Leader retains overall responsibility. It is the duty of care of the Group Leader to ensure, wherever possible, that the competence of each employee is appropriate to her/his role.
- Submit detailed plans to the Educational Visits Co-ordinator (EVC) via Evolve Identify the clear purpose and objectives of the visit.
- Carry out, and provide a written record of, a comprehensive risk assessment.
- Arrange briefing meetings with parents, as appropriate, for high risk, residential and foreign visits.
- Whilst it is not essential for each group to be accompanied by a qualified First Aider, it is an aspect that should be considered at the planning stage of each event.
- Obtain Medical Needs and for any residential trips also meet with the Medical Centre to discuss the pupils on the trip in order to ensure that any specific medical and health issues of pupils or accompanying employees are considered within the planning stages and their needs are catered for.
- Complete the visit documentation and obtain the appropriate approvals from the Principal / Vice Principal and EVC for any visit off-site, whatever the duration.
- Plan the itinerary in sufficient detail to identify every period of the visit including meal, rest and recreational times.
- Have or obtain prior knowledge of the venue.
- Assess, wherever practicable, the suitability and safety of any accommodation to be used. In addition, the window and room locking policy should be established and communicated to parents.
- Inform parents of the detail of the visit, including its nature, purpose and related activities, and obtain their permission/consent for their son / daughter to take part.
- Ensure that parents are fully informed of the schedule for the collection of payments before any bookings are made.
- Allocate supervisory responsibility, to each adult accompanying the visit, for named pupils and ensure that the adults understand that they are responsible directly to the Group Leader.
- Ensure that all the pupils in the party and the accompanying adults are fully aware of the risk assessments, emergency plans and the expected standards of behaviour.
- Ensure that employees have secured cover for their involvement in an off site visit.
- When on the visit, continuously monitor the appropriateness of the activity, the physical and mental condition and abilities of the group members, and the suitability of the prevailing conditions.
- Ensure that on return from a visit, all pupils are delivered, where appropriate, into the care of a person with parental responsibility or their representative.
- Conduct a review of the trip on return, evaluating its success and recording any 'near-misses' or proposed changes for repeat trips in the future. This report should be lodged with the EVC.
- Check when planning an activity requiring it, the provider holds the LOtC Quality Badge, AALS etc.

Refer to: 'Visit Leader' in National Guidance [www.oeapng.info](http://www.oeapng.info)

Refer to: 'Assistant Leader' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### **Role of Parents and Guardians**

Parents and Guardians are requested to:

- Carefully read all information regarding the proposed visit before giving written consent.
- Provide up to date medical and emergency contact details, informing the school in writing before the visit commences.
- Support the school in upholding the Code of Conduct for educational visits.
- Make all payments by the deadlines given, taking note where payments are non-refundable.
- Inform the School immediately if their son or daughter has to withdraw from the visit for any reason, honouring any outstanding commitments to further payments.
- Arrange, where appropriate, for the prompt collection of their daughter on her return from the trip.

Refer to: 'Parents' in National Guidance [www.oeapng.info](http://www.oeapng.info)



## 5. Staff Competence

We recognise that staff competence is the single most important factor in the safe management of visits, and so we support employees in developing their 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 on some educational visits.
- Support for employee to attend training courses relevant to their role, where necessary.

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

- Relevant experience.
- Previous relevant training.
- The prospective leader's ability to make dynamic risk management judgements, and take charge in the event of an emergency.
- Knowledge of the pupils, the venue, and the activities to be undertaken.

Refer to: 'Assessment of Competence' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## Staffing and Supervision

On all visits there must be an 'effective level of supervision' that has been approved by the EVC and Principal.

The visit leader, EVC and Principal must make a professional judgement regarding the number and suitability of staffing on an individual visit basis, after consideration of the following factors:

- The type, level, and duration of activity;
- The nature and requirements of individuals within the group, including those with additional needs;
- The experience and competence of employees and other adults;
- The venue, time of year and prevailing/predicted conditions, if applicable;
- The contingency, or 'Plan B' options.

A visit must not go ahead where either the visit leader, EVC, or Principal is not satisfied that an appropriate level of supervision exists.

Visit leaders, EVCs and Heads often find it helpful to have 'a starting point for consideration'. Where departure from the starting point results in fewer staff, the justification should be recorded as a note on EVOLVE.

See 'Underpinning Framework' on National Guidance [www.oeapng.info](http://www.oeapng.info)

Employees who are assigned to support the special needs of an individual cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

## 6. Vetting and Disclosure and Barring (DBS) Checks

Employees and volunteers who work *frequently* or *intensively* with, or have regular access to young people or vulnerable adults, must undergo an enhanced DBS check with barred list check as part of their recruitment process. For the purpose of this guidance:

- '*frequently*' is defined as 'once a week or more'.
- '*intensively*' is defined as 'four or more days in a month, or overnight'.

Refer to: 'Vetting and DBS Checks' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 7. Direct, Indirect and Remote Supervision

Pupils must be supervised throughout all visits, even though they may be unaccompanied at times.

**Direct supervision** is where an employee is with a pupil / group.

**Indirect supervision** is where pupils are unaccompanied by an employee, but where there is an employee in the vicinity, for example as might occur in a museum or shopping centre, or 'down-time' at an activity centre.

**Remote supervision** is where pupils are unaccompanied by an employee, and the supervising employee is not necessarily in the immediate vicinity, for example as might occur during D of E expeditions, or a 6th Form unaccompanied visit to university open day.

Indirect and Remotely supervised activities can bring valuable educational benefits, and the progression from dependence to independence is to be encouraged. Such activities develop essential lifelong skills, including managing risk, self-sufficiency, interaction with the public and social skills, decision making, etc.

The decision to allow indirect or remote supervision should be based on professional judgement taking into account such factors as:

- Prior knowledge of the individuals (including their maturity and levels of responsibility);
- Venue and conditions;
- The activity taking place;
- Preparatory training;
- The competence of the supervising staff;
- The emergency systems in place.

When recording a **remotely** supervised visit on EVOLVE, there must still be a named visit leader. This will be the employee that has made a professional judgement regarding the level of responsibility and maturity of the participants, and decided that in their opinion it is reasonable for them to be undertaking the specific activity unaccompanied by an adult. A 'Note' should be added to EVOLVE specifying that remote supervision applies.

Refer to the following documents in National Guidance [www.oeapng.info](http://www.oeapng.info)

'Ratios and Effective Supervision'

'Group Management and Supervision'

'Vetting and DBS Checks'

## 8. First Aid

For all visits there should be a responsible adult with a good working knowledge of first aid appropriate to the environment (eg. urban, remote, water, etc).

General 'life experience', or a 3 hour non-assessed 'Basic Skills' course is suitable for routine urban visits. However the nature of the visit may indicate that a higher level qualification is appropriate, especially in circumstances where it is likely that access by the emergency services may be delayed.

Based on the nature of the particular visit, the EVC (or visit leader) should make a professional judgement regarding the level of first aid required.

A first aid kit appropriate to the visit should be carried.

Refer to: 'First Aid' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 9. Overseas Visits

For all visits it is essential that consideration is given to the following:

- Culture: food and drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption, political stability, local financial information, alcohol & drugs.
- Accommodation: checked for suitability, security, safety precautions and emergency evacuation.
- Transport systems have been assessed as safe for use.

The visit leader should consider the relevant country information from the Foreign and Commonwealth Office website: [www.fco.gov.uk](http://www.fco.gov.uk) (from the home page select 'Travel Advice'). All relevant FCO information should be circulated amongst the staff team.

For travel within the European Union (plus Iceland, Liechtenstein, Norway, and Switzerland), all participants must hold a valid EHIC (European Health Insurance Card). See [www.dh.gov.uk](http://www.dh.gov.uk)

For exchange visits:

- The Enquire Learning Trust has adopted the Outdoor Education Advisers' Panel guidance document: *Young People's Exchange Visits*.
- Refer to the British Council (Learning) [www.britishcouncil.org](http://www.britishcouncil.org) For Overseas Expeditions see relevant sections

Refer to: 'Overseas Visits' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## 10. Weather, Clothing & Survival

Where appropriate, the leader must obtain and act upon recent weather forecasts and local advice.

Participants should be adequately clothed appropriate to:

- The time of year, prevailing weather conditions, altitude and exposure to elements;
- Likely changes in weather;
- The experience and strength of the party;
- The nature of the visit and environment.

When venturing away from immediate help, leaders should consider the need for:

- Comfort, insulation and shelter for a casualty;
- Comfort, insulation and shelter for the whole group;
- Provision of emergency food and drink;
- Torch;
- Possible need of signaling equipment and/or mobile phone (NB. Mobile phones may not work in remote areas); It is primarily the responsibility of the visit leader, in consultation with other staff where appropriate, to modify or curtail the visit or activity (eg Plan B) to suit changed or changing circumstances - for example: over-busy lunch area, rain, rising water levels, etc.

## 11. Definition of an ‘adventurous activity’

The following activities are regarded as ‘adventurous’ and require Trust comment:

- All activities in ‘open country’ (see below)
- Swimming (all forms, excluding publicly lifeguarded pools)
- Camping
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing / Wakeboarding
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration
- Shooting / archery / paintballing
- Snowsports (skiing, snowboarding, and related activities), including dry slope
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- Off road cycling
- ‘Extreme’ sports
- Other activities (eg. initiative exercises) involving skills inherent in any of the above

‘Open country’ is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate. Please contact the local authority if you think this might apply.

For the purposes of Advisor Comment, the following activities are not regarded as adventurous and therefore do not require comment. However, these activities must be supervised by an employee who has previous relevant experience and who in the opinion of the EVC and Principal is competent to supervise the activity:

- Walking in parks or on non-remote country paths
- Field studies - unless in the environments stated in ‘open country’
- Swimming in publicly lifeguarded pools
- Theme parks
- Tourist attractions
- Pedal go-karts
- Ice skating (rink)
- Farm visits
- Local traffic survey



- Museum, library, etc.
- Physical Education and sports fixtures (other than the above)
- Water-margin activities

Please contact the Outdoor Advisor via EVOLVE if there is uncertainty over whether a particular activity requires Advisor comment.

### **Adventurous Activities**

This section is applicable to all adventurous activities except the following, for which separate guidance applies:

- Water-based activities
- Open country activities
- Snowsports
- Overseas expeditions

The responsibility for the safety of participants in an adventurous activity will rest with either:

a) **An external provider** - The provider must hold an LOtC Quality Badge or complete a Provider Form Note: If a Provider holds an *AAALA licence* (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

**or**

b) **A member of your establishment's staff** - This person must be specifically approved by the Principal / Outdoor Advisor to lead the activity, via EVOLVE.

### **Open-country activities**

Employees should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

For the purposes of this policy, 'open-country' is normally defined as land above 300m, or more than 1km from vehicular access. However, this is an arbitrary boundary and there may be occasions where this definition is inappropriate.

Open-country activities are regarded as 'adventurous' and therefore these visits require Advisor comment and Principal approval.

The responsibility for the safety of participants in an adventurous activity will rest with either:

a) **An external provider** - The provider must hold an *LOtC Quality Badge* or complete a *Provider Form* Note: If a Provider holds an *ALA licence* (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required. Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying staff continue to retain a 'pastoral' duty of care.

**or**

b) **A member of your establishment's staff** - see below

The following minimum levels of technical competence apply where a member of the establishment's own employees intends to lead an open-country activity:

- For leaders of walking groups outside the UK or Ireland, please contact the Advisor for further guidance.
- For leaders of walking groups in mountainous terrain within the UK and Ireland - Mountain Leader Award (Summer or Winter as appropriate) [www.mltuk.org](http://www.mltuk.org) **or** - A written statement of competence by an appropriate technical adviser
- For leaders of walking groups in summer conditions in non-mountainous hilly terrain (Known variously as upland, moor, bog, hill, fell or down), with well defined obvious boundaries, such as roads and coastlines, and where any hazards within it are identifiable and avoidable, and where wild camping or movement on steep ground is not involved. - Walking Group Leader Award [www.mltuk.org](http://www.mltuk.org) **or** - A written statement of competence by an appropriate technical adviser
- For leaders of walking groups in terrain 'easier' than that defined in c) The leader must demonstrate an appropriate level of competence. This may include one or more of the following:
  - Countryside Leader Award. See [www.countrysideleaderaward.org](http://www.countrysideleaderaward.org)
  - Sports Leaders UK Level 3 Award in Basic Expedition Leadership (BEL). See [www.bst.org.uk](http://www.bst.org.uk)
  - Completion of a suitable 'Leader Training' Course.
  - A written statement of competence by an appropriate technical adviser
  - Evidence of recent, relevant experience, appropriately corroborated.
  - An assessment of competence (written or implied) by the Principal of Establishment.

## Snowsports

Employees should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

Snowsports (eg skiing and snowboarding) are regarded as adventurous activities, and the visit therefore requires Advisor comment.

There are advantages to snowsports taking place during term time as opposed to during the establishment holiday period. These include: greater choice generally, less queuing for lifts, less crowded slopes therefore less chance of collisions occurring, less crowded resort, higher possibility of 'sole use' of accommodation, lessons more likely to be conducted by permanent snowsport establishment instructors (as opposed to 'casual' instructors), greater likelihood of English speaking instructors, considerable cost savings through avoiding high season (possibly allowing more young people to participate), etc.

Employees intending to organise a snowsport visit (but not instruct, lead or supervise on snow) must hold the Snowsport Course Organiser Award (SCO), administered by Snowsport England [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) and must have previously accompanied at least one educational. Pupils may only participate in snowsports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports school. Establishments should therefore consider the merits of fully instructed lessons of 4/5 hours duration per day.

Employees intending to lead skiing or snowboarding (ie. not using a ski school instructor) must be qualified as below and have been approved by the Outdoor Advisor via EVOLVE

**Skiing:** The minimum qualification to lead skiing on snow is:

- The Alpine Ski Course Leader Award (ASCL) [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) **or**
- The Alpine Ski Leader Award (ASL) [www.snowsportscotland.org](http://www.snowsportscotland.org) **or**
- A statement of competence by an appropriate 'technical adviser'

The minimum qualification to lead snowboarding on snow is:

- The Snowboard Leader Award (SBL) administered [www.snowsportscotland.org](http://www.snowsportscotland.org) **or**
- A statement of competence by an appropriate 'technical adviser' –

See EVOLVE Resources for the current good practice guidance on helmets for snowsport activities. Pupils may only take part in off-piste activities if:

- Under the direction of a suitably qualified local instructor, AND
- They will remain within the designated controlled areas, AND
- Off-piste activities are specifically included within the visit insurance policy, AND
- A NOTE is added to EVOLVE in advance of the visit, confirming that the above criteria are/will be complied with.

Refer to '[Snowsport visits](#)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## Overseas Expeditions

Overseas Expeditions (for the purposes of this document) are defined as those which typically involve journeying in remote areas of the world and/or in developing countries.

There are stringent requirements on Overseas Expedition providers, and visit leaders may therefore need to allow up to 18 months for advisor comment to be granted. A 'Note' (for the attention of the Outdoor Advisor) should be added to the EVOLVE Visit Form as soon as possible during the planning stages.

Overseas Expeditions will only be approved if the provider either:

a) Holds an LOfC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

**or**

b) Provides a statement of compliance with *Guidance for Overseas Expeditions, Edition 4*

For providers that do not hold an LOfC Quality Badge, 'Guidance for Overseas Expeditions, Edition 4' should be referred to when the proposal is initiated. This document contains information for both visit leaders and providers, and includes a checklist of vital aspects that **must** be considered prior to the establishment making a commitment with an external provider. Overseas expedition providers are required to comply with the minimum standards specified in this document.

When planning an expedition and selecting a provider, visit leaders should particularly consider the educational aims of the venture, that appropriate progression takes place, and that the requirements relating to 'Best Value' are met.

Visit leaders may find it beneficial to attend the one day course entitled 'Overseas Expeditions and Fieldwork: a Course for Teachers and Youth Leaders' organised by the Royal Geographical Society [www.rgs.org/eac](http://www.rgs.org/eac)

Refer to: 'Overseas Expeditions' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## **Approval of Staff to Lead an Adventurous Activity Procedure For Obtaining Approval**

Employees who wish to **lead** (ie. supervise or instruct) an adventurous activity, must first upload details and scanned copies of all relevant qualifications (eg instructor certificates, first aid, etc) to the 'My Details' section of their EVOLVE account.

The visit leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (eg dates, venues, numbers, etc). The ALF will then be embedded within the Visit Form for that particular visit.

On receipt of a Visit Form (and embedded ALF), the Advisor will view the proposed activity in the context of the leader's competencies and qualifications.

Where approval is not granted to lead the activity, the Visit Form will be returned to the EVC via EVOLVE, with an attached note. Where this is the case the activity must not take place.

### Criteria for approval

Approval will normally be given where the leader of the activity has recent relevant experience, and:

- Is appropriately qualified through the relevant National Governing Body, **or**
- Has a 'Statement of Competence' from an appropriate 'technical adviser' – see below.

For most activities the competence required of a technical adviser is stipulated by the activity's National Governing Body. For further clarification regarding a technical adviser 'Statement of Competence' please contact the Advisor.

In some cases approval may be granted where no qualification is held, but the person concerned is deemed by the Advisor to have a sufficient level of competence in addition to recent relevant experience.

In cases where no National Governing Body exists, the Advisor will make a decision based on factors which may include: technical advice, the leader's stated competence, observed competence, past experience, and attendance at training courses.

Approval will always be subject to a requirement that the leader must act at all times within the remit of his/her qualifications, and in accordance with National Governing Body Guidelines where these exist. Approval may also be subject to other conditions which will be specified by the Advisor on the Visit Form.

Where there is insufficient information for the Advisor to make a decision regarding approval, then the applicant may be asked to provide further information (eg evidence of awards, experience, and log book details, etc). In some cases a meeting with the applicant may be requested by the Advisor.

Approval to lead an adventurous activity is specific to the technical aspects of the adventurous activity detailed. It is not an indication in respect of other aspects of the visit such as general management and supervision skills, the assessment of which may be the responsibility of Principal and/or EVC.

## Emergency procedures

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

The school has an emergency plan in place to deal with a critical incident during a visit (see Appendix 2). All employees on visits are familiar with this plan and it is tested at least bi-annually and following any major staffing changes.

Refer to: 'Critical incident management' in National Guidance [www.oeapng.info](http://www.oeapng.info)

Refer to: 'Emergency planning establishment' in National Guidance [www.oeapng.info](http://www.oeapng.info)

Refer to: 'Emergency procedures for visit leaders' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## Educational Visits Checklist

The Enquire Learning Trust Educational Visits Checklist forms part of the risk management process for visits and off-site activities, and may be downloaded from EVOLVE Resources. A visit should only go ahead if the answer to all relevant questions is 'YES'. This can be completed and attached to EVOLVE or used as an aide-mémoire

## Parental / Carer Consent

Consent is not required for activities within the School Learning Area that are part of the normal curriculum during normal school time.

The school obtains blanket consent at the start of each year for certain other routine activities, eg. after school fixtures, etc. Parents must complete a paper consent form.

Specific, (ie. one-off), parental consent must be obtained for all other visits. For these visits, sufficient information must be made available to parents (via EVOLVE, letters, meetings, etc), so that consent is given on a 'fully informed' basis.

Refer to: 'Parental Consent' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## Inclusion

Under the Equality Act 2010, it is unlawful to discriminate against disabled participants because of their disability, without material or substantial justification. The school is required to make reasonable adjustments to avoid participants being placed at a substantial disadvantage. However, the Equality Act does not require responsible bodies to place employees or participants at inappropriate risk if a health and safety issue arises. It is also the case that the adjustments made to include a disabled pupil should not impinge unduly on the planned purpose of the activity.

Refer to: '[Inclusion](http://www.oeapng.info)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### **Charging / funding for visits**

The cost of all visits must be budgeted for within the School's annual budget process or covered by a supplemental charge to parents.

### **Transport**

It is expected that all transport is of an equal standard to that expected in the United Kingdom when pupils undertake a trip/visit using either public transport and/or private hire. Where this is not the case, parents must be informed before they consent to the trip/visit. It must not be assumed that the legal requirements in another country are the same as those in the United Kingdom.

Where it is deemed appropriate that pupils use their own cars and/or lift share parental permission must be sought both for the driver and any passengers. The trip leader is expected to consult the EVC. Where a third party is used to provide transport the same factors should be considered. Similarly, where standards of transport such as safety (e.g. seat belts) do not meet those demanded in the UK, parents must be informed in advance.

Refer to: '[Transport general considerations](http://www.oeapng.info)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### **Private Cars**

Teachers and others who drive pupils in their own car must ensure their passengers' safety, that the vehicle is roadworthy, and that they have appropriate license and insurance cover for carrying the pupils. Volunteers should be carefully vetted by the School before they are permitted to drive pupils in their car. The driver is responsible for making sure that pupils have a seat belt and use it at all times. Vehicles without seat belts should not be used. Visit Leader who wish to use parents, volunteers or other pupils to help transport pupils in their own cars, must ensure that they are aware of their legal responsibility for the safety of the pupils in their cars. Parents' agreement should be sought for their pupils to be carried in other parents' cars. It is advisable that parents driving pupils are not put in a position where they are alone with a pupil. The group leader should arrange a central dropping point for all pupils rather than individual home drops.

Refer to: '[Transport in private cars](http://www.oeapng.info)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

Refer to: '[FAQ6 Use of private cars](http://www.oeapng.info)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### **Insurance**

Refer to: '[Insurance](http://www.oeapng.info)' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## General

Insurance cover must be arranged using the School's annual insurance via the RPA agreement. The School insurance policy covers most educational visits. Advice on what is covered should be sought from the Business Manager. Additional arrangements may be necessary to obtain insurance cover for activities abroad and activities of a potentially hazardous nature. The group leader should also ascertain the details of the insurance held by any tour operator being used. Additional cover may also be necessary for participants with medical conditions. The group leader should check this with the insurance company via the Business Manager before departure. The group leader should write to the parents to tell them which responsibilities the School accepts and the scope of any insurance cover the School is to arrange. It is advisable to make copies of the insurance schedule available to parents as early as possible in the booking process.

## Cancellations

Some parents may cancel their pupil's place in the visit. The group leader should forward any cancellations to the insurer/operator as soon as possible, in writing, if a replacement is not available. Delay in notification may incur cancellation charges.

## Transport

When hiring coaches etc the Visit Leader should check that the company used has appropriate insurance. When using School/private vehicles, the Visit Leader should check that the insurance policy is appropriate to the journey. Taking the School minibus abroad will require permission of the Headmaster and may require extra insurance. It may also require specific training or qualifications. It is the organiser's responsibility to check this. The Visit Leader should also check that the teacher driving the School minibus abroad is appropriately insured and that their driving license is valid for the countries to be visited or passed through en route. Teachers, other adults or pupils using their own cars to carry pupils on visits should ensure that their vehicle is properly licensed and that the insurance covers its use on School business.

## Swimming

All swimming activities and venues must be included within the visit plan, and lifeguarding arrangements checked in advance. This is particularly important in respect of visits abroad, where for example, a hotel pool may be available.

Pupils must be supervised by a competent adult at all times whilst undertaking swimming activities. The following criteria apply:



## Swimming pools (lifeguarded)

- UK Swimming Pool safety is guided by various Health and Safety at Work Acts and Regulations. Pool operators have a duty to take all reasonable and practicable measures to ensure that teaching and coaching activities are conducted safely.
- For publicly lifeguarded pools abroad, the establishment's employees must seek assurances that appropriate lifeguard cover is in place prior to participants entering the water.
- Unless suitably qualified, the establishment's employees should not have responsibility for lifeguarding. However, they do retain a pastoral role for participants at all times either through direct or 'remote' supervision.
- For swimming lessons, the visit leader should ensure the swimming teacher in charge or other pool employees/responsible adults supervising the participants are qualified according to current guidelines.

Refer to: 'Swimming in a Swimming Pool' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## Hotel (and other) swimming pools

The visit leader should check the lifeguarding position in advance.

If lifeguarding arrangements are not provided at the pool then the visit leader will bear the full responsibility for ensuring swimming safety, and approval to lead the activity will be required via EVOLVE.

The following awards/qualifications apply:

### For free swimming activity

- A valid RLSS UK National Pool Lifeguard Qualification (NPLQ), or equivalent in the country visited - see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

### For structured or programmed activity

- A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see [www.lifesavers.org.uk](http://www.lifesavers.org.uk) or
- A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement.

- see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

The role of the lifeguard is:

- To directly supervise the pool and the pool users, exercising appropriate levels of control. (Note: the lifeguard should remain on the poolside at all times except in the case of an emergency)
- If necessary, brief pool users in advance regarding rules (eg. no diving, running, etc.).
- To communicate effectively with pool users.
- To anticipate problems and prevent accidents.
- To intervene to prevent behaviour which is unsafe.
- To carry out a rescue from the water.
- To give immediate first aid to any casualty.

The above must be accomplished in the context of the normal operating procedures and the emergency plan for the pool, which should be considered before swimming takes place. Full familiarisation of the systems described should be walked through at the pool. Employees must be aware of the procedures in the event of an emergency, and who at the venue will provide back up. Employees should also know if they have exclusive use of the pool, as other pool users may increase the supervision role of your lifeguard. If a pupil holds an appropriate qualification then their role should be emergency lifeguard action, and supervision should remain the responsibility of the establishment's employees.

Refer to: 'Swimming in a Swimming Pool' in National Guidance [www.oeapng.info](http://www.oeapng.info)

Open water swimming (ie not in a swimming pool and not a 'water-margin' activity) Trust Approval is required via EVOLVE. Particular consideration should be given to the following factors:

- Unknown locations and hazards, especially overseas.
- Changing environmental conditions.
- Supervisor complacency.
- Adherence to local advice.
- Preparation and knowledge of young people, ie. is it a planned activity? The designated lifeguard must be dedicated exclusively to the group, and the location used must fall within the RNLI/RLSS definition of a 'safer bathing area'. Local advice must always be sought. For free swimming activity
  - A valid National Beach Lifeguard Qualification (NBLQ) or equivalent in the country visited, see [www.lifesavers.org.uk](http://www.lifesavers.org.uk) Note: this is for beach/sea only, not inland water. *or* For structured or programmed activity
  - A valid RLSS UK National Rescue Award for Swimming Teachers and Coaches (NRASTAC) or equivalent - see [www.lifesavers.org.uk](http://www.lifesavers.org.uk) *or*
  - A valid RLSS UK Water Safety Management Award (WSMA), with appropriate endorsement. (available from 2013) see [www.lifesavers.org.uk](http://www.lifesavers.org.uk)

Refer to 'Natural Water Bathing' in National Guidance [www.oeapng.info](http://www.oeapng.info)

## Water-Margin Activities

### This section applies to:

Activities that take place near or in water – such as a walk along a riverbank or seashore, collecting samples from ponds and streams, or paddling or walking in gentle, shallow water\*. It does not apply to swimming and other activities that require water safety or rescue qualifications and equipment, or water-going craft.

\* 'gentle' means hardly moving at all. 'shallow' typically means up to the knees of the participants.

Employees should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

At the outset the leader must decide whether the activity:

a) Falls **within** the definition in bold above - in which case the below guidance applies,

or

b) **Exceeds** the definition in bold above - in which case this is a water-based adventurous activity and the below section 'Water-based Activities' applies.

All employees involved in water-margin activities should be conversant with the guidance contained within Group Safety at Water Margins. This document must be made available to all supervising adults in advance of the visit and can be found in Evolve resources.

As with all visits, where appropriate there should be an approved alternative 'Plan B' that could be used where conditions dictate, and for which parental consent has been obtained if necessary.

The leader must have previous relevant experience, and must have been assessed as competent to lead the activity by the EVC and/or Principal.

Refer to 'Natural Water Bathing' in National Guidance [www.oeapng.info](http://www.oeapng.info)

### **Water-Based Activities**

For clarification between water-margin and water-based activities see above section

The Enquire Learning Trust acknowledges the immense educational benefits that water-based activities can potentially bring to young people, and fully supports and encourages water-based activities that are correctly planned, managed, and conducted.

Employees should ensure that the intended outcomes of the activity are balanced with all reasonably practicable safety precautions.

The following are not regarded as adventurous activities for the purposes of approval:

- Swimming in publicly lifeguarded pools
- Water-margin activities

Commercial craft, tourist boat trips, and similar activities for which young people would not normally wear personal buoyancy. With the exception of the above, all other forms of water-based activities are regarded as adventurous activities, and as such require the appropriate approval. The responsibility for the safety of participants in an adventurous activity will rest with either:

a) **An external provider** - The provider must hold an *LOtC Quality Badge* or complete a *Provider Form*

Note: If a Provider holds an *AAALA licence* (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required. Note: Whilst the responsibility for the safety of participants rests with the provider, the accompanying employees continue to retain a 'pastoral' duty of care.

**or**

b) **A member of your establishment's staff** - This person must be specifically approved by the EVC to lead the activity, via EVOLVE.

In order to participate in water-based activities, participants should normally be water confident. Participants who lack water confidence may still be able to take part subject to consideration of all factors, including the activity itself and supervision arrangements. The level of water confidence of all participants must be known by the activity leader prior to the commencement of water-based activities.

Leaders should have knowledge of the water conditions/hazards (and potential changes) that might be encountered, and prepare accordingly. Local advice must be sought where appropriate, eg coastguard, harbour master, other site users, etc.

Personal buoyancy conforming to the appropriate National Governing Body must be worn at all times by all participants in water based activities, except, at the discretion of the activity leader, where the activity:

- Takes place in a swimming pool, **or**
- Is 'swimming', **or**
- Is an activity for which personal buoyancy would not normally be worn by pupils.

### Using an External Provider

An 'External Provider' is defined as where there is an element of instruction, staffing, or guiding, for example:

- Activity Centre - Ski Company - Educational Tour Operator - Overseas Expedition Provider - Climbing Wall where instruction is provided by climbing wall staff - Freelance instructor of adventurous activities - Youth Hostel (where instruction is provided) - Voluntary organisation (e.g. Scout Association), where instruction is provided

For the purposes of this policy, an External Provider is NOT a: - Youth Hostel (where accommodation only is used) - Hotel, B&B, etc - Campsite - Museums, galleries, etc - Tourist attractions - Theme Parks - Farms

- Coach, Train, or Airline company - Swimming Pool - Climbing Wall where instruction is provided by a member of St John's School staff with an approved Activity Leader Form (ALF) - 'Volunteer' instructor of adventurous activities (see below)

The decision about the use of an external provider is the responsibility of the visit leader, EVC, and Principal. The Advisor does not 'approve' external providers or tour operators.

Visit Leaders should consider the requirements under 'best value' when selecting an external provider.

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

- a) The Provider holds an LOtC Quality Badge [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) or [www.kaddi.com](http://www.kaddi.com)
- or**
- b) A 'Provider Form' has been satisfactorily completed by the provider Note: If a Provider holds an AALA licence (and/or any other accreditation) but not an LOtC Quality Badge, then a Provider Form is still required.

Note: EVOLVE will automatically identify providers that hold an LOtC Quality Badge, via the search tool Kaddi [www.kaddi.com](http://www.kaddi.com)

**For Providers that hold an LOtC Quality Badge** [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk) or [www.kaddi.com](http://www.kaddi.com) No further action is necessary, other than to check the suitability of the provider/venue in relation to the intended aims or learning outcomes for the particular group.

**For Providers that do not hold an LOtC Quality Badge or** [www.kaddi.com](http://www.kaddi.com)

### Procedure

[www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk)

- Download a Provider Form from EVOLVE.
- Complete the top section.  
Send Provider Form to the provider (email, fax, post). - On its return check that it has been satisfactorily completed.

Keep Provider Form on file together with all other relevant documentation.

**Important:** If the Provider has made any alterations to the wording of the Provider Form or is unable to comply, then you must discuss this with the Provider, and if necessary seek advice from the EVC / Advisor prior to making a commitment with the Provider.

The Provider Form should be sent to the provider at the time of making a provisional booking and no deposits should be committed prior to its satisfactory completion and return.

The satisfactory completion of a Provider Form does not necessarily signify that the service on

offer will be appropriate for the young people from your establishment. A pre-visit and recommendation from previous users will help you decide on its suitability.

In some instances, for example where a visit leader intends to use an 'external', **voluntary** individual for services, then this person may be regarded as a temporary employee and the procedure outlined in 'Approval of employees to lead and adventurous activity' may be appropriate.

The above procedure is **not** sufficient for Overseas Expeditions (ie. those which typically take place in remote areas of the world and/or in developing countries), for which separate arrangements are applicable and **must** be complied with, see 'Overseas Expeditions.'

## 12. Appendix 1 – School Learning Area

### General

Visits/activities within the ‘School Learning Area’ that are part of the normal curriculum and take place during the normal school day follow the Operating Procedure below.

These visits/activities:

- do not require parental consent
- do not normally need additional risk assessments / notes (other than following the Operating Procedure below).
- should be recorded on EVOLVE if regular, eg swimming lessons
- do not need to be recorded on EVOLVE if these are ad-hoc activities but is good practice to.

### 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:

- EVC must give verbal approval before a group leaves.
- Only employees judged competent to supervise groups in this environment are approved. A current list of approved employees 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.
- There will normally be a minimum of two adults.
- Employees are familiar with the area, including any ‘no go areas’, and have practiced appropriate group management techniques.
- Pupils have been trained and have practiced standard techniques for road crossings in a group.
- 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.
- Employees are aware of any relevant pupil medical information and ensure that any required medication is available.
- Employees will deposit in the office a list of all pupils and employees, a proposed route, and an estimated time of return.
- A school mobile is taken with each group and the office have a note of the number.
- Appropriate personal protective equipment is taken when needed (eg gloves, goggles)

### 13 . Appendix 2 – Emergency Procedure

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

- There is always a nominated emergency base contact for any visit (during school hours this is the office).
  - This nominated base contact will either be an experienced member of the senior management team, or will be able to contact an experienced senior manager at all times.
  - For activities that take place during normal school hours, the visit leadership team will be aware of any relevant medical information for all participants, including employees.
  - For activities that take place outside normal school hours, the visit leadership team and the emergency contact/s will be aware of any relevant medical information and emergency contact information for all participants, including employees.
  - The visit leader/s and the base contact/s know to request support from the Principal 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.
  - For visits that take place outside the School Learning Area, the visit leader will carry either:
    - An Emergency 'Card' (see EVOLVE Resources), or
    - An OEAP National Guidance Emergency action card
- This Emergency Procedure is tested through both desk top exercises and periodic scenario calls from visit leaders.