



**St. Joseph's
Catholic Academy**



Outdoor Learning & Educational Visits Policy

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**Bishop Chadwick
Catholic Education Trust**

Policy details

Approved by:	Local Governing Committee
Last reviewed on:	September 2026
Next review due by:	September 2027

1. Purpose and scope

This policy sets out the Academy's expectations for the planning, approval, delivery, monitoring and evaluation of outdoor learning and educational visits. It applies to all employees, volunteers and others working under the Academy's direction.

It covers outdoor learning at the Academy's normal base, local visits, curriculum visits, sporting fixtures, residential visits, overseas visits, adventurous activities, Duke of Edinburgh's Award activity and any other activity for which the Academy accepts a duty of care.

- Educational value, safeguarding, inclusion and the wellbeing of participants are central to every decision.
- The Academy will make reasonable adjustments and seek to enable participation alongside peers wherever this can be achieved safely and without undermining the purpose of the activity.
- The Academy will use proportionate systems. Greater complexity, unfamiliarity or vulnerability will require more detailed planning, scrutiny and support.

2. Policy framework and precedence

The Academy formally adopts OEAP National Guidance as its core source of guidance for outdoor learning and educational visits. Staff must follow the current National Guidance and this Academy policy.

Order of precedence: Where there appears to be a conflict, the Academy's policy and instructions must be followed. Staff must pause and seek clarification from the EVC or Headteacher before proceeding.

The Academy will link staff to OEAP information pages and current Academy procedures rather than reproduce detailed technical rules which can change. This policy should be read with the Trust's health and safety, safeguarding, behaviour, medicines, allergy safety, charging and remissions, data protection, insurance, staff conduct and transport arrangements.

EVOLVE is the Academy's system for recording plans, approvals, competence information, relevant assurance, emergency details and evaluation. It must be used in accordance with the current Academy procedure.

3. Roles and delegated responsibilities

The Academy will make its delegated approval and advisory arrangements clear to all staff. Delegation does not remove the Academy's legal responsibilities or the Headteacher's responsibility for ensuring that suitable systems are in place.

Role	Core responsibility
Trust and governing body	Maintain appropriate Academy arrangements, receive assurance about implementation and support strategic monitoring.
Headteacher	Ensure suitable systems, resources and delegated approval arrangements; make or oversee approval decisions and lead the Academy response to serious incidents.
Educational Visits Coordinator	Support and challenge staff, check planning and competence, maintain records and procedures, monitor practice, provide or arrange training and advise the Headteacher.
Visit Leader	Plan, lead and review the visit; understand the group, manage significant risks, brief staff and participants, respond to changing conditions and record learning for the future.
Assistant Visit Leaders & volunteers	Work within an agreed role, follow briefings and report concerns promptly. They do not lead or supervise beyond the level for which they are assessed as competent.
Emergency SLT home contact	Remain contactable for the agreed period, access the visit information and follow the Academy emergency plan.

4. Educational purpose, inclusion and participant welfare

Every visit must have clear intended learning or developmental outcomes. Leaders should involve participants in appropriate preparation, risk awareness and evaluation so that they understand how to contribute to a safe and successful experience.

- Planning must take account of participants' additional needs, medical information, allergies, dietary requirements, access needs, behaviour, confidence, experience and wellbeing.
- The presumption is that children and young people are entitled to participate. Any limitation must be based on an individual, proportionate assessment and agreed with relevant parents, carers and professionals.
- Information must be shared only with those who need it to plan or deliver the visit safely, in accordance with the Academy privacy information and data protection procedures.

5. Planning, approval and review

All visits must be planned and submitted in good time using EVOLVE. The level of planning and approval must be proportionate to the visit and the group. The Academy will not accept late planning as normal practice.

Stage	Required action
Standard visits	Plan and submit through EVOLVE using the current Academy timetable. The leader must use established operating procedures and record any significant additional issues.
Enhanced planning visits	Residential, overseas, adventurous, water based, unaccompanied expedition and other complex visits require enhanced planning, appropriate leader approval and any required adviser consultation.
Before commitment	Obtain outline permission before signing a contract, paying a deposit or making a commitment that could expose the Academy or families to a financial liability.
During the visit	Use ongoing dynamic assessment. Modify, curtail or use an agreed alternative plan where circumstances change.
After the visit	Evaluate outcomes, record significant learning or incidents and update future planning arrangements where needed.

Documentation outlining the approval process and timescales can be found in the Educational Visits folder on the All Staff OneDrive.

The EVC and Headteacher may require any visit to be revised, deferred or not approved where the educational purpose, staffing, competence, supervision, provider assurance, communication, financial arrangements or emergency planning are not satisfactory.

6. Staff competence, staffing and volunteers

Approval of a leader is based on professional judgement about that person leading that particular group, activity and environment. It is not based solely on technical qualifications. The EVC and Headteacher will consider experience, training, judgement, group management, knowledge of participants, practical competence, fitness, relevant qualifications and the likely ability to respond calmly in an emergency.

- All staff wishing to lead a visit must complete South Tyneside Council's Educational Visit Leader training and refresh this training at least every three years.
- The Academy operates an apprenticeship style system for visit leadership. Before leading a visit, staff must build relevant experience as an assistant visit leader under the supervision of an approved leader. Staff must demonstrate successful

experience of leading day visits before they are considered for approval to lead a residential or adventurous visit. Staff must demonstrate successful experience of leading residential visits before they are considered for approval to lead an overseas visit.

- Staffing levels will be determined through risk benefit assessment. There is no single ratio suitable for all visits. Staffing must be sufficient for effective supervision, safeguarding, participant needs and a credible response if a member of the group requires support.
- Volunteers must be recruited, vetted, inducted, briefed, assessed as suitable for their role and appropriately supervised. They may not act as a visit leader unless the Headteacher has specifically approved this arrangement.
- Staff must disclose any medical or other issue that may affect their safety, judgement or capability on a visit, in confidence and in sufficient time for appropriate planning.

7. Risk management and safeguarding

Risk management is an ongoing process which balances the expected benefits of the visit against significant risks. Leaders must identify the matters that need active management, decide how risks will be reduced to an acceptable level and record significant findings in a clear and useful form.

- Risk assessment records must be proportionate, dated and identify who completed them. They should show the practical decisions made, not create unnecessary bureaucracy.
- Leaders must use dynamic assessment throughout the visit and change, curtail or stop an activity when conditions, participants or other circumstances make this necessary.
- Planning must include credible alternative arrangements where conditions, venue capacity, transport, weather or other foreseeable factors may require a change.
- The EVC will maintain generic risk information and standard operating procedures for regular activities and known local hazards. Leaders must check that these remain suitable for the specific group and circumstances.
- All adults must be briefed on their safeguarding responsibilities, supervision arrangements, communication methods and the action to take if there is a concern.

8. Parents, carers, consent and participant information

Parents and carers will receive timely, accessible and sufficient information about their child's proposed participation, including its purpose, arrangements, costs, expectations and any significant risks. Information must enable a parent or carer to make an informed decision and to update relevant participant information.

- Where the Academy uses annual or one off consent, it must still inform parents and carers about each visit (and give them an opportunity to withdraw consent before participation where it is not a part of the school curriculum).
- Specific consent is required where Academy policy, the nature of the visit, financial commitments, overseas travel, adventurous activity or a participant's circumstances make this necessary.
- Consent to take part in an activity, agreement to financial terms and consent to process personal data are separate matters and must be managed using the appropriate Academy process.
- Leaders must ensure that essential emergency, medical, allergy, dietary and contact information is current, available to those who need it and handled securely during and after the visit.

9. Venues, facilities and external providers

Leaders must select venues, facilities and external providers that are suitable for the intended outcomes, group needs and relevant safety standards. A provider is an external person or organisation contracted to organise or lead part of a visit. A facility is a venue or resource used by the Academy without the venue leading the activity. The distinction will inform the checks required.

- The Academy will use current OEAP guidance and Academy processes to assess providers and facilities, drawing on independently assessed quality assurance where appropriate and seeking further evidence where the activity, group or circumstances require it.
- Providers remain responsible for managing the technical risks within the provision they are contracted to deliver. Academy staff retain responsibility for pastoral care, safeguarding, supervision of the group and decisions within their own role.
- Leaders do not need to request a provider's technical risk assessment. However, they must obtain and act on information that affects the Academy group, including safety instructions, participant requirements and contingency arrangements.
- A preliminary visit is required where it is the proportionate way to establish the suitability of an unfamiliar venue, accommodation, provider, route, activity or participant arrangement. The EVC may require one.

10. Transport, residential, overseas and adventurous visits

Transport, residential, overseas and adventurous visits require particular care because of their additional complexity. Leaders must follow the relevant current OEAP guidance and Academy policy and procedures. Detailed technical standards,

qualifications and activity requirements are maintained outside this policy so that staff use current information.

- Private vehicle use must be authorised in accordance with current Trust and Academy procedures, including driver suitability, insurance, vehicle checks and child restraint requirements.
- Residential arrangements must address accommodation, supervision overnight, staff conduct, safeguarding, first aid, medication, security, insurance and emergency response.
- Overseas planning must include appropriate travel advice, health requirements, documents, insurance, provider and accommodation checks, local emergency arrangements and a realistic alternative or cancellation plan.
- Adventurous, water based, open country and unaccompanied expedition activity must be led or delivered only by people approved as competent for the specific activity and environment, with any adviser consultation required by the Academy.

11. Emergency procedures and incident reporting

The Academy maintains an emergency plan for visits. Every leader must understand the plan, carry or be able to access the information needed for their visit and know how to contact the emergency home contact. The emergency contact must have access to the visit plan and participant information for the agreed period.

- Each visit must have clear arrangements for checking out before departure, checking in at agreed points where needed and confirming safe completion on return.
- In an emergency, leaders must take immediate action to safeguard people, seek emergency assistance where required, maintain appropriate supervision and make contact through the Academy emergency arrangements as soon as reasonably practicable.
- Serious incidents, near misses and safeguarding concerns must be reported through Academy procedures. The EVC will ensure that learning is captured and shared appropriately.

12. Conduct, finance, insurance and property

The Academy's behaviour, staff conduct, safeguarding, charging and remissions, insurance and finance procedures apply to all visits. Leaders must set clear expectations for participants and adults before departure, including expectations about behaviour, use of personal devices, alcohol, smoking or vaping, medication, money, valuables and respect for others.

- No participant should be excluded solely because of financial hardship. Leaders must follow the Academy charging and remissions arrangements and manage payments, deposits, refunds and cancellation terms transparently.
- Appropriate insurance must be confirmed for every visit. The leader must understand any limitations, exclusions and participant responsibilities relevant to the planned activity.
- Participants and staff remain responsible for their own property unless the Academy has expressly agreed otherwise. Leaders must make proportionate arrangements to secure valuables, particularly on residential visits or when property must be left behind for an activity.

13. Monitoring, evaluation, training and continuous improvement

The EVC and Headteacher will monitor the implementation of this policy through proportionate review of EVOLVE records, approval decisions, participant feedback, incident information, evaluation and, where appropriate, observation of visits in the field. Governors will receive assurance about the effectiveness of the Academy's arrangements.

- Monitoring will focus particularly on new or less experienced leaders, complex activity, patterns of late planning, repeated providers, incidents and areas where improvement is required.
- Every visit must be evaluated against its intended outcomes and any significant operational learning. The EVC will use this information to improve procedures, training, provider selection and future planning.
- The Academy will maintain appropriate EVC and visit leader training, records of experience and a succession plan so that high quality visits remain sustainable.

14. Policy review and communication

The EVC will review this policy annually and sooner where there is a change in Academy arrangements, OEAP National Guidance, legal requirements, local operating procedures or learning from incidents. The current policy and related procedures will be available electronically to all staff and communicated through induction, training and updates.

Appendix A. Core National Guidance reference points

The Academy uses the current versions of OEAP National Guidance, accessed through the OEAP National Guidance website. Staff should use the information pages and current linked documents rather than saved copies.

- Foundations and the legal framework for Academy systems and establishment roles.
- Approval of leaders, monitoring, charging and inclusion.
- Risk management, ratios and effective supervision, parental communication and consent, safeguarding, emergency planning, insurance, medication and data protection.
- Selecting and using external providers and facilities, transport, residentials, overseas visits and the relevant Section 7 guidance for activities and hazards.
- Writing an evaluation and supporting checklists and model procedures.

Current source: OEAP National Guidance is available at <https://oeapng.info/guidance-documents/>. The EVC will maintain live links to the guidance most relevant to Academy practice.



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