ACHIEVING TOGETHER

FOUR STONES GATEWAY TRUST

EDUCATIONAL VISITS POLICY

For Shropshire Schools

DATE POLICY WAS APPROVED	01.07.2026
DATE POLICY WILL BE REVIEWED	Summer 2028
MEMBER OF STAFF WITH RESPONSIBILITY FOR REVIEW	Head of Estates

Key Definitions

All policies incorporate the following schools or organisations within Four Stones Gateway Trust ('the Trust') that are physically based within Shropshire Local Authority:

- Clee Hill Community Academy
- Cleobury Mortimer Primary School
- Lacon Childe School
- SHaW (Shropshire, Herefordshire and Wolverhampton) Maths Hub
- Stottesdon CofE Primary School
- Any other schools or organisations that may join the Trust from time to time and not listed above.

The terms Academy, School, Organisation and Trust are considered interchangeable in the context of all Trust policies.

Where appropriate, in this policy the term:

"CEO" includes the Chief Executive Officer

"CFOO" includes the Chief Financial Officer

"Trust Senior Leadership Team" includes Executive Headteachers, Headteachers, strategic operational leads and Teaching School/SCITT Directors.

"Headteacher" includes the appropriate School Headteacher.

"Trustees or Trust Board" are appointed Trustees who oversee the business of Four Stones Gateway Trust, agreeing the overarching strategic direction and ensuring robust governance.

"Local Academy Boards (LAB)" are appointed Governors at a local level. LAB Governors act as advocates for their school's Safeguarding, SEND, Standards and Stakeholder engagement.

"Chair" responsible for leading the board and ensuring its effectiveness

"Stakeholders" are any individuals or companies who are invested in the welfare and success of the Trust and/or School and its students, including staff members, students, parents, community members, LAB, LGB or Trust members, trade unions, local business leaders etc.

TELFORD & WREKIN COUNCIL
POLICY AND GUIDANCE
FOR
EDUCATIONAL VISITS AND JOURNEYS

Adopted by the Shropshire Schools of
Four Stones Gateway Trust

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Foreword

The learning experience for young people in schools and settings should be so much more than simply lessons in classrooms. We aim to support all of the children to develop into adults who are not only vital members of their community but also appreciate a wider understanding of the society and environment they live in.

Learning outside of the classroom offers unique opportunities to enrich learning, enhance personal and social development, gain greater awareness of different environments and adopt healthy lifestyles.

Learning outside of the classroom can contribute not only to the development of the young people, but also to the expectations of the school from Ofsted. The Ofsted Education Inspection framework (May 2019) describes, in the Quality of Education judgement for Curriculum Intent that inspectors will evaluate the extent to which:

- *leaders take on or construct a curriculum that is ambitious and designed to give all learners, particularly the most disadvantaged and those with special educational needs and/or disabilities (SEND) or high needs, the knowledge and cultural capital they need to succeed in life*

Also for Personal Development. Inspectors will evaluate the extent to which:

- *the curriculum extends beyond the academic, technical or vocational. It provides for learners' broader development, enabling them to develop and discover their interests and talents*
- *the curriculum and the provider's wider work support learners to develop their character – including their resilience, confidence and independence – and help them know how to keep physically and mentally healthy*

We therefore welcome this policy and guidance which should support staff to organise valuable learning experiences beyond school whilst at the same time ensuring that the young people, and those caring for them, are safe and that their wellbeing is protected.

DOCUMENT STATUS:	Telford and Wrekin Council Policy. Telford and Wrekin Council Guidance
EFFECTIVE FROM:	First published September 2019 – updated June 2026
NEXT REVIEW:	As per front page
RELATED DOCUMENTS:	The Department for Education (DfE) Guidance Health & Safety on Educational Visits https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits
	Outdoor Education Advisers Panel - National Guidance for the Management of Outdoor Learning, Off-site Visits and Learning Outside the Classroom (Reviewed and updated on regular basis) https://oeapng.info/
	OEAP - **5.3b How to write an establishment visit policy**
	TWC Guidance – School Emergency Plan
SUPERSEDED DOCUMENTS:	
AUDIENCE:	Head Teachers, Principals and Managers of Schools; all other educational settings; other private, voluntary or independent establishments and those that are commissioned by TWC
	Educational Visit Co-ordinators (EVCs)
	Visit Leaders / Assistant Leaders
	Governing bodies
	Local Authority Officers –Telford and Wrekin Council: • Directorate for Education and Skills • TWC Internal Health and Safety Service • Legal and Insurance Services • Public Health and Civil Resilience Services

TWC Policy for Educational Visits and Journeys

This policy is essential for all those who have responsibility for the approval, planning and/or execution of any educational visit or Outdoor Learning including on site adventurous activities.

All visits must be planned and organised in accordance with this document. The status of this document is mandatory for all Telford & Wrekin maintained schools and for establishments working under the TWC Educational Visits Service Level Agreement. Schools / Establishments, school staff and course providers have a duty of care to their children and young people, any accompanying adults, each other and themselves to ensure that they are kept safe and well and, that, in the event of any incident, they are able to respond appropriately in order to minimise the risk of harm.

Any Telford and Wrekin foundation or voluntary aided schools choosing not to follow the Telford & Wrekin Policy and Guidance must (as employers) have other guidelines in place for educational visits and journeys, which the Local Authority (LA) will expect to be at least as comprehensive as its own guidelines.

Telford and Wrekin Council is responsible for:
An Outdoor Education Adviser accredited by the Outdoor Education Advisers' Panel

Telford and Wrekin Council will make available for all academies or maintained schools under a Service Level Agreement:

1. Telford and Wrekin Local Authority Policy and Guidance for Educational Visits and Journeys which is compliant with Department of Education's guidance 'Health and Safety on Educational Visits' and adopts the Outdoor Education Advisor Panel's National Guidance.
2. The Evisits software system (induction and training provided).
3. Forms 16A to 16H and the E-Visits software system with associated training and support. The Form 16A matches the EVisits software.
4. Initial and revalidation training for Educational Visits Coordinators (compulsory role for all schools).
5. Termly network meetings for Educational Visits Coordinators (Minimum attendance of 1 meeting per school year will count as revalidation instead of repeating the EVC training if preferred).
6. Email and telephone support with response time within 5 working days (term time).
7. Monitoring of visits.
8. Approval of Category 2b Educational Visits; outdoor adventurous activities both on/off site, residential visits, visits overseas and their associated journeys via EVisits.
9. Document Library on EVisits for guidance, events and resources.
10. Outdoor Learning and First Aid and Leadership courses (fees will vary).

Schools/ Establishments are responsible for following this policy and guidance and:

1. Ensuring the School has policy and practice for Educational Visits and Journeys, which can be supported via SLA and this document.

2. Appointing an Educational Visits Coordinator (EVC) and makes sure they have the training they need. The Head Teacher has this duty if there is no coordinator. The EVC works with the TWC Outdoor Education Adviser to help their colleagues in schools to assess and manage risks.

3. The EVC should:
   - be an experienced visits leader (or alternative and relevant experience)
   - have the status to be able to guide the working practices of other staff
   - be confident in assessing the ability of other staff to lead visits

- be confident in assessing outside activity providers
- be able to advise Head Teachers/Governors when they are approving visits
- have access to training, advice and guidance.

4. Schools/establishments must have an emergency response plan that covers what to do if there is an incident during an Educational Visit or outdoor learning including on site or adventurous activities. This must be part of the School/Establishment Emergency Plan. This plan must include communications plan that covers how routine communications should be handled, including regular check-ins and calls to reassure people. Visit Leaders must be familiar and confident with these plans.

5. Schools/establishments using an external organisation or provider are responsible for checking they have the appropriate safety standards and liability insurance. There should be an agreement that makes it clear what everyone is responsible for, which is especially important if the organisation or provider is taking over supervision of the young people. The school/establishment is responsible for making sure required dietary, allergen, medical and behavioural information for both staff and young people are communicated as appropriate.

6. School/establishments are responsible for evaluating all visits once they have concluded from the planning through to the visit itself. Schools/establishments are required to keep a record of any incidents, accidents and near misses. This will help with evaluation of the value of the visit and to learn from any incidents which took place and inform the management of future visits.

TWC Guidance for Educational Visits and Journeys

1. Introduction

1.1 This guidance is essential for all those who have responsibility for the approval, planning and/or execution of any educational visit or Outdoor Learning including adventurous activities on site. All visits and Outdoor learning must be planned and organised in accordance with this document. The status of this document is mandatory for all Telford & Wrekin maintained schools. Any foundation or voluntary aided schools choosing not to follow the Telford & Wrekin Guidance must (as employers) have other guidelines in place for educational visits and journeys, which the LA will expect to be at least as comprehensive as its own guidelines.

1.2 Schools/establishments, school staff and course providers have a duty of care to their children and young people, any accompanying adults, each other and themselves to ensure that they are kept safe and well and, that, in the event of any incident, they are able to respond appropriately in order to minimise the risk of harm.

1.3 This guidance sets out Telford and Wrekin Council's (TWC) expectations of how Educational Visits, Outdoor Learning (including on site adventurous activities) and any associated journeys will be managed by its Employees and those that have adopted this Employer Guidance. T&WC has adopted the Outdoor Education Adviser's Panel (OEAP) National Guidance to make sure Educational Visits and Outdoor Learning are properly planned, managed and run by competent staff and to maximise their many benefits.

2 TWC adoption of Outdoor Education Advisors Panel National Guidance

National Guidance

2.1 Telford and Wrekin Council has adopted the OEAP National Guidance. This will ensure that this Guidance for Educational Visits and Journeys reflects nationally recognised standards. To ensure that the most up to date National Guidance is accessed, please go to the OEAP website: http://oeapng.info/

2.2 This Policy/Guidance document can be accessed through the Telford and Wrekin Council Educational Visits Service Level Agreement which can be accessed by emailing: EdVisits@telford.gov.uk All associated guidance, training information, events and resources are found within the documents section of your establishment's EVisits site.

2.3 OEAP National Guidance is written and kept up to date by leading and informed professionals and replaces the previous TWC / Shropshire Guidelines. This TWC Guidance contains specific additional detail and clarification that has developed through input from the TWC Health and Safety Team, Head Teachers, Educational Visit Coordinators (EVCs) and the Outdoor Education Service.

2.4 In the event of any apparent conflict between TWC Guidance, your school/establishment's policy or National Guidance, then TWC Guidance must be followed and clarification sought from the Educational Visits Co-ordinator, Outdoor Education Adviser or line manager.

2.5 Throughout this document, reference is made to individual OEAP guidance documents; these are the key documents which are regularly updated, but further information may exist. TWC recommend the use the OEAP website and its search function, and that the most current version of a document is always used.

3. Clarification of Roles

3.1 All Educational Visits and Outdoor Learning activities will follow the hierarchy below and this is used in both the paper based and E Visits systems:

- **Visit Leader (VL)** - Initiates, plans and runs the visit and/or Outdoor Learning activity and on return completes an evaluation.
- **Educational Visits Co-ordinator (EVC)** – checks the plans and associated documents, gives outline approval, monitors progress, assesses the success (or otherwise) and provides feedback to improve future visits or Outdoor Learning activities. Under T&WC Employer Guidance every school/organisation **must** have an EVC and they **must** be registered with the Outdoor Education Advisor and be current.
- **Outdoor Education Adviser** – For the higher risk/more complex visits the Outdoor Education Adviser checks the plans and associated documents, gives LA approval (or otherwise) and provides training, advice and guidance to improve future visits or Outdoor Learning activities.
- **Head Teacher/ Senior Manager** – checks that essential elements for the visit or outdoor Learning activities are in place and **must** give their approval by using Evisits or Form 16A.
- **Governors / Management Board** – will determine which Educational Visits and Outdoor Learning they would like to be notified of in advance to give their prior approval. It is their responsibility to ensure an Establishments Visits Policy is in place for their school/establishment as part of their health and safety statutory requirements. This Establishment Educational Visits Policy should clarify any establishment-specific requirements of these and other roles within their school/organisation. Any delegation of key areas of responsibility, such as assessment of competence or approval must be clear. The policy should also set out the criteria for selecting the EVC, if these are different from those recommended in National Guidance.

Refer to OEAP National Guidance **3.1b Establishment roles and their inter-dependence** for further details.

4. Procedural Requirements

4.1 This guidance applies to all situations where adults acting in the course of their employment have responsibility for children and young people taking part in Educational Visits or Outdoor Learning including on site adventurous activities.

4.2 All schools/establishments following TWC Educational Visits and Journeys Guidance **must** have a trained EVC who has either been trained by TWC or has, within 3 years, revalidated their training with an accredited OEAP Provider. Every EVC **must** attend at least one TWC EVC training course and then may maintain subsequent revalidation by attending at least 1 out of 3 Network Meetings each year. Attendance at Network Meetings is recorded and used for revalidation of the EVC role every 3 years. EVCs are also welcome to attend repeat EVC training if this is deemed appropriate. The numbers of EVCs required by the school / establishment is a decision for the Head Teacher / Senior Manager.

4.3 Educational Visits and journeys are placed in 3 categories:-

- **Category 1. Routine activities covered by generic risk management.** These are off-site activities and outdoor learning on-site activities that take place during school hours and which are a normal part of a child's education. These involve no more than an everyday level of risk, such as slips and trips, and are covered by a school's current policies and procedures. They only need a little extra planning beyond the educational aspect of the trip. They can be considered as lessons in

a different classroom. These would include the use of the school grounds for enhancing the delivery of the curriculum including data collection and local studies. Also included typically would be regular visits to a library or place of worship. Routine PE fixtures although not covered by Educational Visits and Journeys Guidance would be another example.

- **Category 2a. Visits and/or journeys that require enhanced planning and event/journey specific risk management but are NOT residential, overseas or adventurous.** These visits require one-off consent, parents **must** be given specific information about the visit and their child's proposed participation, and **must** also be given the opportunity to withdraw their consent should they not wish them to participate. Examples will include visits that extend beyond the school day (out-of-hours), longer journeys that involve breaks e.g. for toilets and food stops, and larger public venues such as national museums and regional cultural events.

- **Category 2b. Visits that are residential, or require travel overseas, or are adventurous in nature.** These require detailed planning to reflect the challenging environments, distant locations, and higher risk activities. The activities in this category require enhanced Leader competence. These visits are those that are any of the following:
    - Residential visits
    - Visits that involve travelling outside England, Scotland and Wales
    - On-site adventurous activities
    - Off-site adventurous activities
    - The associated journey and travel arrangements

4.4 Adventurous activities both day/residential and both on/off site include:

Multi activities (from list)	Abseiling	Airborne: all types
Archery	Assault course	Bell boating
Bushcraft	Camping in wild country	Camping on campsites
Caving	Clay pigeon shooting	Climbing: indoor & outdoor
Coasteering	Cycling on tracks & roads	Dog sledging
Dragon boating	Field studies: natural envt.	Forest School
Free running	Go karting	Gorge walking
Ghyll scrambling	Hang gliding	Horse/pony riding
Hovercraft	Improvised rafting	Jet skiing
Kayaking	Kite surfing	Mine exploration
Motorised sports (all)	Mountain biking	Mountain boarding
Open canoeing	Orienteering	Paintballing
Pot-holing	Powered boats inc. safety	Ropes Courses
Rowing	Sailing	Scuba diving: indoor pools
Scuba diving: lake & sea	Segway	Shooting
Skateboarding	Skiing & snowboarding	Snorkelling
Surfing/body boarding	Swimming: not lifeguarded	Trampolining out of PE
Walking: Hill & Moorland	Walking: Lowland	Walking: Mountain
Water skiing	White-water rafting	Wind surfing/sailboarding

4.5 EVC's will audit Category 1 and 2a Visits and/or journeys themselves, and refer Category 2b visits to the Outdoor Education Adviser. All visits are given final approval by the Head Teacher or their equivalent in other establishments. Where this responsibility is delegated, this must be clearly stated in the school/establishment policy.

4.6 This process is supported by a software system called 'EVisits' which has replaced the Form 16A. EVisits is provided as part of the SLA and accessed on request through: EdVisits@telford.gov.uk EVisits is the required system as it includes Visit Leader profiles, secures data and has clear reporting lines. All Category 2b Notifications to T&WC and the Outdoor Education Adviser are required through EVisits.

Notification and approval of visits and/or journeys

- **Category 1 visits and/or journeys.** These will be organised through general school planning. Generic risk assessments must be in place and available for the EVC for process checking. Submitted to the Head/Manager for approval as part of annual curriculum for approval. EVisits can be used if desired and this will add any visits to the school/establishment calendar.
- **Category 2a Visits and/or journeys**. Visit Leaders complete EVisits and Form 16C (and 16D if relevant) to the EVC for process checking. On receipt from the Visit Leader, the EVC must check that all required information is included and then submits to the Head Teacher/Manager for approval. Again this process is done through the EVisits software package and added to the EVisits calendar.
- **Category 2b Visits and/or journeys**. Visit Leaders complete Evisits and Form 16C (and 16D if relevant) which go to the EVC for process checking. On receipt, the EVC checks that all required information is completed fully and submits to the Head Teacher/Manager for approval. Once the Head Teacher has approved the Visit, EVisits and Forms 16C (and 16D if relevant) the visit is submitted to the Outdoor Education Adviser for process checking and approval and notification to TWC. **This process is done through the EVisits software.**

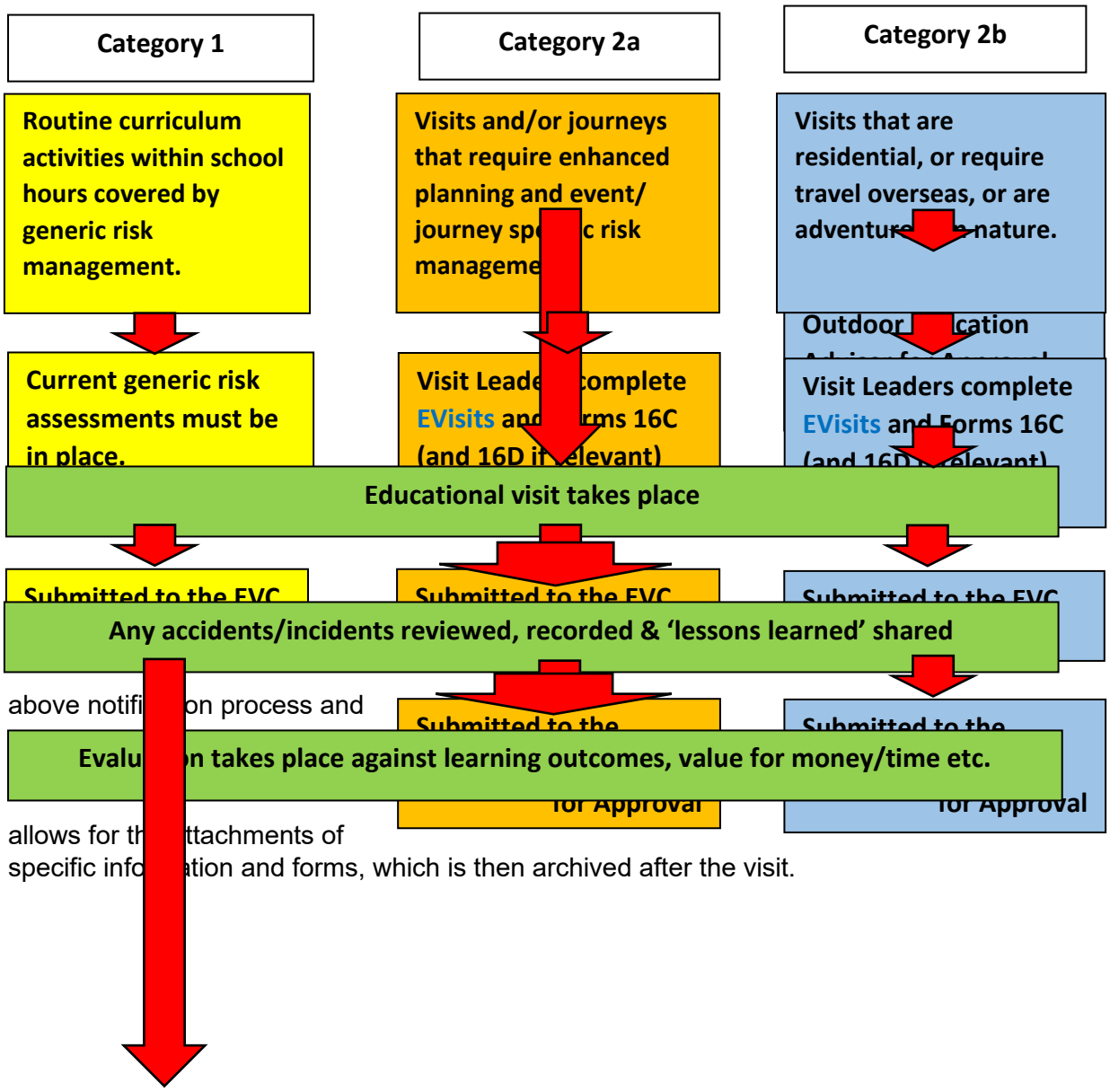
4.8 TWC strongly recommend that all those who lead Visits and Outdoor Learning undertake Visit Leader Training to meet OEAP National Guidance requirements for leader competence. Leaders must be current in their knowledge of expectations of good practice, so update refresher training is also strongly recommended. Schools/establishments may find training for Visit Leaders is most successful when delivered to staff teams, giving consistency of understanding and practice. Course options are a 3 hour theory module (via Teams) or 6 hour face-to face (theory and practice) – both nationally accredited with the OEAP and certificated.

4.9 TWC requires any commissioned provider, purchased or otherwise, providing Educational Visits and Outdoor Learning to work within the OEAP National Guidance and to be able to demonstrate their compliance through a quality standard, accreditation or scheme e.g. Learning Outside the Classroom Badge. The Form 16D: External Provider Declaration is a generic way to audit a provider's compliance if required. Please note it is NOT a requirement to ask for copies of Risk Assessments from a Provider although a Safety Management Summary should be available for inspection and a reputable provider will provide the necessary information to inform and support a Visit Leader in their planning and risk management.

4.10 Category 2b educational visit submission to the Outdoor Education Adviser is required **four working weeks** before the departure date. This is to allow any recommendations to be considered and implemented. Notifications will be considered after this 4 week period but a response cannot be guaranteed. Advice may also be sought well in advance if a visit and/or journey is particularly complex for any reason. **Notification is via Evisits.**

4.11 Duke of Edinburgh Award Expedition. This guidance applies to DofE training, assessed expeditions and practice walks. EVisits, Form16C (Forms 16D and 16G, as relevant) and route information clearly marked on a map are required to be submitted to the Outdoor Education Adviser **four working weeks** before the departure date. This is to allow any recommendations to be considered and implemented**.** Forms will be considered after this 4 week period but a response cannot be guaranteed. **Notification is via Evisits.**

4.12 Notification of Educational Visits and/or Journeys Summary



above notifi on process and

allows for th ttachments of specific info ation and forms, which is then archived after the visit.

EVisits follows the is a version of the Form 16A and visit

5. Monitoring

5.1 Schools and other education settings should ensure that there is sample monitoring of Educational Visits and Outdoor Learning including on site adventurous activities. 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 to the School/Establishment, principally carried out through systems put in place by the EVC.

5.2 TWC will monitor through the notification process.

Refer to OEAP National Guidance document: **3.2b Monitoring** for further details.

6. Induction, training, apprenticeship and succession planning

TWC offers training to assist educational establishments in discharging their duties with regards to educational visits and journeys, as follows:

6.1 **Educational Visits Co-ordinator**: ALL EVCs must hold a current OEAP EVC training certificate (valid for 3 years). TWC provide 6-hour OEAP accredited initial and revalidation training for Educational Visits Coordinators as part of the core SLA package. Also provided are termly Network Meetings for Educational Visits Coordinators, again, as part of the core package. Attendance at these meetings may be used for revalidation rather than repeat attendance at EVC training (minimum attendance of 1 meeting per school year will be required). An OEAP EVC certificate is issued by T&WC and a record of EVC course attendance is kept.

6.2 **Visit Leader Training:** OEAP accredited Visit Leader Training (Theory and Practical) is offered by TWC as a recommended option for EVCs, and strongly recommended for staff leading and/or taking a key role on an Educational Visit.

6.3 **Management of Visit Emergencies:** TWC also offers the OEAP accredited Management of Visit Emergencies (MOVE), a 2–3-hour scenario-based course for EVCs and Managers. This is an expanded section of the EVC Training course.

6.4 **Endorsement of Visit Leaders:** OEAP National Guidance provides clear advice regarding the assessment of Visit Leader competence. It is an expectation as part of this guidance that all leaders and their assistants have been formally assessed as competent to undertake the responsibilities of leading the educational visit or Outdoor Learning including on site adventurous activities. 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. The OEAP Education Visit Leader course attendance is an indicator of competence. OEAP National Guidance sets a clear standard to which leaders **must** work. EVisits includes Staff Profiles to evidence and ratify competence – Required for Category 2b Visits.

6.5 **Accompanying Staff:** Staff participating in educational visits and Outdoor Learning including on site adventurous activities must be aware of the extent of their duty of care and should only be given such responsibilities 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.

6.6 **Volunteers:** Adults volunteering are required to follow the instructions of the Visit Leader and the accompanying school staff to help with ensuring the health, welfare and safety of the children. They may be allocated a group to supervise and help, but not be left in sole charge of the children. 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 aware of their roles and responsibilities with regards their own, and other children. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment. The Form 16G is provided to assist with roles and responsibilities.

6.7 **Additional Outdoor Education Courses:** Additional and specific training courses are also provided to support Visit Leaders; examples include First Aid appropriate to Educational Visits, woodland activities and forest skills, use of school grounds and local areas, and outdoor learning linked to curriculum delivery, and first-hand data collection through field studies. School/establishment bespoke courses are also available on request and content can be adjusted to needs and time available. Assistance is provided with outdoor leadership awards such as the Lowland Leader (walking) and the John Muir Award.

6.8 **Apprenticeship model:** Competence is a combination of skills, knowledge, awareness, judgement, training and experience. It is not necessarily related to age or position within the establishment. It is situational – a leader who is competent in one activity or environment may not be so in another - and it involves breadth as well as depth. Relevant experience is not necessarily gained by repeating the same thing several times, but by experiencing a range of different activities and environments. Shadowing an experienced and competent Visit Leader, can develop accompanying staff in preparation to becoming the future Visit Leader themselves. By taking responsibility for less complex and lower risk visits first, skill sets can be developed and confidence built.

6.9 **Succession:** To avoid a visit becoming dependent on one individual, succession planning is required. Planning for a visit should also include consideration of the possibility of the Visit Leader or an Activity Leader becoming incapacitated. An Assistant Leader can contribute to supervision, support the Visit Leader with agreed aspects of the visit and act as deputy for a Visit Leader. At the same time the Assistant Visit Leader will be developing their experience and competence for the future.

Refer to OEAP National Guidance document: **3.2d Approval of Leaders** and **4.3a Good Practice Basics** for more details.

7. Risk management, risk-benefit assessment, ratios and effective supervision

7.1 TWC, as an 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, and the associated support, training and resources necessary to implement this policy are provided to employees. The risk management of an activity should be informed by the benefits to be gained from participating. TWC strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the desired benefits and learning outcomes. HSE endorse this approach through their ***“Principles of Sensible Risk Management”*** and advocates that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

7.2 There is a legal requirement for the risk assessment process to be formally recorded and for suitable and sufficient control measures to be identified for all significant risks i.e. those that may cause serious harm to individuals. Form 16C is provided for this purpose and has styles of risk assessment which a Visit Leader may choose to apply. ‘Form 16C with notes’ gives assistance with this process. When completing a risk assessment it is essential to focus on what is important, to keep this group of children, safe on this day, with these staff, doing this activity - be specific. The risk assessment includes the safety of staff, volunteers

and members of the public. The risk assessment shows the Visit Leader's thinking and then informs the 'how' the visit is going to be managed safely, which can then be shared.

7.3 **Risk Benefit Assessment Process** Risk management, in the context of outdoor learning and off-site visits, an integral part of the planning process, and is a two-stage process:

1. Identify the potential benefits to be gained from an activity, and any significant risks to the health and safety of those involved.
2. Plan and implement measures to reduce these risks as low as reasonably practicable without losing the benefits.

The visit risk assessment needs to include the journey, the self-led aspects of any visit, any down times, anything required because of a specific child, venue or aspect of an activity. The process should link with the School/Establishment incident plan and 'Plan B', should include things go wrong.

7.4 Risk-Benefit Assessment is included in both the EVC, Visit Leader and MOVE training and regularly included in EVC Network Meetings. TWC Health and Safety Team also provide training.

7.5 School/establishment risk assessments are required with the completion of EVisits. Risk assessments from a Provider are not required; evidence of their management of risk can be shown through their safety statements and relevant accreditation e.g. the Learning Outside the Classroom Badge (LOtC), and/or the Adventure Activities Licence. If not LOtC accreditation is available, please request the completion of a Form 16D – 'External Providers Declaration'.

7.6 Staffing ratios are a risk management issue and should be determined through the process of risk assessment. It is not possible to set down definitive staff/participant ratios for a particular age group or activity.

7.7 **Ratios and effective supervision** TWC require the staffing ratio to young people sufficient to ensure effective supervision and considering:

- Staff competence and their relevant and recent experience
- The nature of the activity (including its duration).
- The age and gender (including developmental age) of the young people to be supervised. The ability of the young people (including their behavioural, medical, emotional and educational needs).
- The location and environment in which the activity is to take place.
- Distance from the home base and/or assistance and emergency help.
- The consequence of a member of staff being indisposed, particularly where they will be the sole leader with a group for any significant time.

7.8 TWC provide the following ratios of staff to young people for **guidance**. Staff ratios may be decreased if the risk assessment supports it, or may also need to be increased as an outcome of the risk assessment process. (The term 'staff' here includes all competent adults provided by the school / establishment).

- Nursery: **1:2**
- Reception: **1:4**
- School years 1 - 3, **1:6** (overnight minimum **1:6**)
- School years 4 - 6, **1:15** (overnight minimum **1:10**)
- School years 7 onwards, **1:15** (overnight minimum **1:10**)

7.9 When planning a repeat visit or a series of activities, it is important to review the previous plan (no matter how well it worked in the past) so as to ensure that it meets current group needs and any other changes (e.g. time of year and experience level of the staff).

Refer to OEAP National Guidance documents: **4.3c Risk Management – an overview, 4.3f *Risk Management – some practical advice,* 4.3g Risk Management - What to Record and How, 4.3b Ratios and Effective Supervision** and **4.2a Group management and Supervision**

8. Assessing venues and providers

8.1 Where possible, an exploratory visit will give the Visit Leader greater confidence in their ability to supervise the pupils. It will help the Visit Leader to concentrate on the needs of the group as well as the unexpected demands of the environment. The aim of the exploratory visit is to:

- ensure that the venue is suitable to meet the aims and objectives of the visit
- undertake a full appraisal of learning opportunities and experiences
- identify what facilities are available and what the leader will need to provide
- establish the level of care and supervision which will be required
- identify any special problems or hazards and the organisation and expertise required to cope with them
- establish what information the provider will need and by when
- Consider what alternative activities are available if those planned could be adversely affected by weather or other changes.

8.2 If a visit is impractical the same information needs to be gathered by other means – from the venue or provider, previous visit leaders, other users and local information sources.

8.3 Use the Form 16D as a guide to selecting a provider and/or accommodation but take advantage of established national approval schemes such as:-

- Learning Outside the Classroom Badge
- Adventure Activities Licence
- Schools Travel Forum
  (See TWC resource 'Know your Badges)

8.4 For providers who do not hold external accreditation, please see Form 16D External Providers Declaration which is a pre-visit questionnaire to assist with gaining information to make an approval decision.

8.5 You should **not** ask for copies of providers' risk assessments but should seek any information specifically aimed at helping Visit Leaders to manage their visit and complete the school/establishment risk assessment, such as a Safety Management Statement, Health & Safety Policy, or information for specifically written for visit Leaders.

Refer to OEAP National Guidance document: **4.4h Using external providers** and **4.4f Checklist - Assessing a Provider.**

9. Volunteers

9.1 If your establishment uses volunteers, then your policy should address the following;

- The vetting procedures for volunteers, including when an enhanced DBS check is required.
- The minimum induction and training procedures for volunteers.
- Under what circumstances (if any) volunteers may act as Visit Leaders or their assistants. If volunteers are allowed to act as Visit Leaders, they must be accountable. This implies that they have been engaged through a thorough recruitment process that includes vetting and induction into the establishment's policies and procedures.
- How volunteers are assessed as competent to carry out their assigned role.
- Requirements for supervision of volunteers.

9.2 The Form 16G is provided for use with volunteers, and you will need to ensure you collect any relevant medical needs and/or dietary requirements.

Refer to OEAP National Guidance document: **3.4o Volunteers**

10. Emergency procedures and incident reporting

10.1 Schools and Establishments need to have an emergency response plan that covers what to do if there is an incident away from school. Or if there is an incident at base that the Visit Leader may find affects the visit currently taking place off site or on their return.

10.2 For the purposes of these procedures, examples of an emergency might be:

- an accident leading to a fatality or other serious injury;
- circumstances in which a party member is/might be seriously at risk;
- serious illness;
- any situation in which the press or other media are, or might be involved;
- significant delays that need to be communicated to parents/others.

Please note, that it is not possible to give a definitive list of what might constitute an emergency. Visit Leaders should consider any unexpected event and decide whether or not the circumstances amount to an emergency and whether the emergency procedures should be followed.

10.3 The establishment policy should explain the visit emergency procedures, including any procedures or support provided by the employer. This should include nominating suitable people to provide 24/7 cover at base during a visit; these contacts need to be competent to fulfil this role. The Emergency Contact(s) should have 24/7 access to all details of the visit, including medical and next-of-kin information for staff and young people e.g. access to E Visits.

10.4 The School/establishment policy should also refer to the establishment's or employer's procedures for incident reporting. EVCs are encouraged to share their experiences as 'Lessons Learned' in Network Meetings to inform the policies and practice of other schools and establishments in the T&WC community.

10.5 TWC has a Resilience Team do not advise on school incident planning but will support if needed with a serious incident. The resilience team are to be notified if it is a Serious Incident, including: Fatality, serious injury, staff misconduct, public disorder, arson or any other incident which may have H&S, PR or Councillor reporting implications. *(Contact details at end)*

10.6 Depending on the nature and seriousness of the emergency, a response to media enquiries may be required, and the press may approach schools directly. Consideration needs to be given to who amongst the staff, and/or the Governing Body is to act as spokesperson in dealing with the media; this is likely to include the Headteacher, but may need to include others.

Telford & Wrekin Council provides a paid-for crisis communications support service for schools who purchase the annual contract, so is available to support these schools in responding to such enquires, and communicating to parents and wider audiences. To trigger this support, please contact corporatecommunications@telford.gov.uk

Refer to OEAP National Guidance documents **4.1h Avoiding Accidents and Emergencies, 4.1i Emergencies and Critical Incidents – An Overview, 4.1g Model Emergency Procedures for Visit Leaders**, **4.1h Model Emergency Plan for Establishments**

11. Behaviour

11.1 The school/establishment policy should encourage the use of codes of behavioural conduct as a means of establishing appropriate expectations of young persons' behaviour. Such codes should be

explained to young people and parents before a visit, so reducing the opportunity for misunderstanding of both expectations and the sanctions that may be invoked where the code is breached.

11.2 The policy should address the following:

- Do young people sign up to a "behavioural contract" for all residential visits?
- Do parents also sign and accept responsibility for removing young people in prescribed circumstances?
- What are the expectations for discipline and sanctions on visits?
- Any specific establishment rules relevant to visits (e.g. whether children are allowed to bring mobile phones or other electronic devices).

11.3 Careful consideration should be given to pupils whose behaviour is likely to pose a serious risk to themselves or others on a visit. An individual risk assessment may be required and a balanced and reasoned decision reached as to whether control measures are suitable and sufficient to enable the young person to take part in the educational visit.

Refer to OEAP National Guidance documents **8.1i Model Code of Conduct** for more details.

12. Inclusion

12.1 Every effort should be made to ensure that Educational Visits and Outdoor learning including on site adventurous activities, are available and accessible to all who wish to participate irrespective of disability, special educational or medical needs, ethnic origin, sex, religion etc.

12.2 All young people should be encouraged to participate in as wide a range of activities as possible. If a visit is to cater for pupils with particular needs, a suitable venue should be selected and in some cases additional supervision, resources or support may be needed or activities adapted. An individual risk assessment may be appropriate. Visit Leaders are responsible for ensuring a Provider is fully informed of all relevant information including medical, emotional, dietary including allergens, and behavioural to enable them to fulfil their duty of care.

12.3 Early discussion with all parties concerned including parents about what is needed will enable plans to be drawn up to meet these needs in most situations. These should enable the child/young person to take part safely and benefit from the visit.

12.4 Your Establishment Visits Policy should endorse these principles:

- A presumption of entitlement to participate.
- Accessibility through direct or realistic adaptation or modification.
- Integration through participation with peers.

12.5 It is unlawful to:

- Treat a disabled young person less favourably.
- Fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage **without justification.**

12.6 Expectations of staff must be reasonable, so that what is required of them (to include a given young person) is within their competence and is reasonable.

Refer to OEAP National Guidance documents **3.2e Inclusion**

13. Insurance

13.1 The Visit Leader must ensure, well before the group departs, that adequate insurance arrangements are in place. Trust schools are all part of the government's Risk Protection Arrangement for schools https://www.gov.uk/guidance/join-the-risk-protection-arrangement-rpa-for-schools#about-the-rpa

13.2 The Visit Leader should inform the parents of 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.

13.3 Additional arrangements may be necessary to obtain insurance cover for activities abroad and activities of a potentially hazardous nature. The party leader should scrutinise carefully the list of exclusions in the policy. If there is any doubt about the cover the provider of the insurance should be asked for clarification.

13.4 The Visit Leader must ascertain the details of the insurance held by the tour operator together with confirmation of their membership of ABTA/ATOL or the appropriate trade organisation.

13.5 Additional cover may be necessary for participants with certain known medical conditions. The party leader should check this with the insurance company before departure.

13.6 Cancellation/curtailment of the trip is usually covered by travel insurance. The reason for cancellation will determine whether a refund is available under the insurance policy. Limits will apply within a policy. It is important to understand terms and conditions in advance.

13.7 When hiring coaches etc. the party leader should check that the company used has appropriate insurance both in terms of motor vehicle insurance and public liability insurance.

13.8 The Visit Leader should check that the insurance policy for the school minibus is appropriate to the journey. Taking the school minibus abroad may require extra insurance.

13.9 The School/establishment must check that the drivers of the school minibus abroad are appropriately licensed for the countries to be visited or passed through en-route.

13.10 Where the transport arrangements for a particular visit or journey are to involve the use of privately owned motor vehicles the party leader must obtain confirmation from the vehicle owner that it is fully and appropriately insured, particularly in respect of passenger liability and for use on the school business which the vehicle is to be put on that occasion. (Note: Where a vehicle is insured in the name of a spouse or relation "business use" cover may not extend to the driver concerned – only the policy holder). If there is any doubt the owner concerned must check with his/her insurance company so that the required confirmation can be obtained. It is good practice for the school to request and retain a copy of the valid insurance certificate.

Refer to OEAP National Guidance **4.4c Insurance** for more details.

14. Finance

14.1 Local authorities, maintained schools and academies (including free schools, studio schools and University Technical Colleges) must take account of the law relating to charging for school activities, as set out in sections 449 to 462 of the Education Act 1996.

14.2 No charges may be made unless the governing body of the school or local authority has drawn up a charging policy giving details of the optional extras or board and lodging that they intend to charge for, and a remissions policy.

14.3 Schools and local authorities **must not** charge for:

- Education provided during school hours.
- Education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.
- Transport provided in connection with any educational visit of this type.
- Supply teachers to cover for teachers who are away from school on a visit.
- It should be noted that 'part of the National Curriculum' is not restricted to outdoor learning experiences that are specifically subject based but includes, for example, activities designed to fulfil requirements under the National Curriculum 'inclusion statement'.

14.4 Schools and local authorities **may** charge for optional extras, which include:

- Education provided outside of school time that is not:
    - Part of the National Curriculum.
    - Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
    - Part of religious education.
- Board and lodging for a pupil on a residential visit, except to parents in receipt of certain benefits (broadly equivalent to those that qualify children for Free School Meals).
- Extended day services offered to pupils (e.g. activity clubs).

14.5 The Visit Leader should ensure that parents have early written information about the costs of the visit, how much will come from school funds and how much each parent will be charged or asked to contribute. Parents should be given enough time to prepare financially for the visit. It will be useful to break the costs down into subheads such as travel, hostel/accommodation, meals etc. This is essential for residential visits in term time to show clearly the elements for which a charge may be made against those for which a voluntary contribution only may be sought.

14.6 The Headteacher/Manager should ensure that banking arrangements are in place to separate the visit's receipts from other school funds and from private accounts.

14.7 The Headteacher/Manager or party leader should reach a pre-agreement with parents on whether any funds left surplus after the visit will be returned to the parents concerned or retained by the school to be used for another visit(s).

14.8 The Headteacher should obtain the parents' agreement to meet the costs of an optional extra visit before the visit is planned in detail. Charging parents for an optional extra visit must not include an element of subsidy in respect of other pupils whose families do not meet the full charge.

14.9 Government guidance on charging for school activities is available at the following website. This includes details of the benefits which exempt parents from being charged for board and lodging https://www.gov.uk/government/publications/charging-for-school-activities

Please refer to OEAP National Guidance **3.2c Charging for School Activities**

Contacts

Alan Braybrooke Outdoor Education Adviser (OEAP Accredited)

alan.braybrooke@telford.gov.uk

Tel; 01952 387378/ 07772583729

Angela Meakin E Visits System Administrator

Email: **angela.meakin@telford.gov.uk or EdVisits@telford.gov.uk**

Tel: 01952 387378

Telford and Wrekin Council

Arthog Outreach, Short Wood Centre, Limekiln Lane, Wellington, Telford, TF1 2JA

Emergency contacts

Telford and Wrekin Schools:

Resilience Team / Emergency Planning Duty Manager: Office Hours: 01952 381800

Out of Hours: 07580 531257

For Shropshire schools:

Shropshire Fire Control 01743 260290.

Ask Shropshire CC Emergency Planning Duty Manager.

Give them a number to call you back on.

16. Educational Visit Forms

- **Form 16A:** Ed visit planning form matches the EVisits software.
- **Form 16B:** Checklist to plan their visit
- **Form 16C:** Risk Benefit Assessment to cover educational value, foreseeable risks and suitable and sufficient control to manage the risks identified. There may be a need to include personalised RBA for anyone for whom the visit may pose a specific and unique risk. Form C with notes gives an explanation on how to complete a Risk Benefit Assessment.
- **Form 16D:** External Provider Declaration
- **Form 16E:** Parental consent form for a specific school visit.
- **Form 16F:** Emergency contact information
- **Form 16G***:* Formal agreement for the provision of pastoral support by Volunteer Supervisory Adults during Educational Visits
- **Form 16H:** Evaluation of Visit

E-Visits Educational Visits Software – replaces Form 16A and required for visit notifications.

The E-Visits system has been created by the Outdoor Education Advisers Panel. Telford & Wrekin Council have purchased the system to enable maintained schools, academies and other organisations to manage

their education visits with an electronic system. **E-Visits is the required system as it includes Visit Leader profiles, secures data and has clear reporting lines**. E-Visits is provided as part of the SLA and accessed on request through: EdVisits@telford.gov.uk

E-Visit is an online system that works independently of any school or T&WC system. Telford & Wrekin Council, along with the Outdoor Education Adviser and Administrator are responsible for the day to day management of the system, backed up by technical support from the developers QES. It is GDPR compliant and certified.

All T&WC schools and other schools/organisation within the T&WC Educational Visits Service Level agreement have been added to the system. Once the Educational Visit Coordinator (EVC) and Establishment Administrator have been identified, and training has taken place the school/organisation will have the option to be made live on the system.

All visits are stored on the system and can be viewed by the EVC and Head Teacher at draft and completed stage. This is an audit tool to view all visits taking place in the establishment, which can be used by the school and the employer, including in the event of an emergency.

E-Visits reduces the amount of paperwork associated with visits. Some documents will still be required depending on School's own policies and to provide further detail. The forms are included with this guidance in the Appendix and all queries to EdVisits@telford.gov.uk