

School Visits Local Policy and Protocol

December 2016



This document is to be used alongside the Local Authority Educational Visits Policy, it does not replace this document.

St John's Primary buy into the Council's Educational Visits Advisory Service and follow the detailed roles, responsibilities and standards for Educational visits and adventurous activities specified by the Outdoor Education Advisers Panel National Guidance website - www.oeapng.info.

Planning a visit

- Any visit out of school (or visitor in) should have an educational value and should enhance the curriculum. The only exceptions might be an end of year visit or a reward for good attendance/tuition session etc.
- All trips must be planned and added to Evolve at least three weeks in advance (four weeks for category 3 visits) and will not be permitted otherwise (apart from exceptional circumstances e.g. where school has had a last-minute invitation to take part in an event). Parent letters and generic risk assessment to be added to Evolve.
- For category 3 visits, a copy of your letter to parents and risk assessments (if appropriate) should be added to Evolve at least 4 weeks prior to the trip. This leaves time for the Local Authority to authorise through Evolve. For complex visits, a detailed itinerary should also be added to Evolve and given to parents.
- All visits are authorised by the Head Teacher via Evolve.
- Check out the cost of the visit and make sure the venue can accommodate your group – make sure you have sufficient funds in your 'enrichment' budget to cover the cost (less maximum £2 per child parental contribution for non-residential visits). Ask yourself whether the visit represents good value for money!
- Book with the venue and arrange with the SBM for any deposit or full balance to be paid using the school's P Card or via invoice
- Give at least three weeks' notice to the office and the kitchen so that the correct lunches can be ordered
- Check that school's minibuses are available and that there are enough appropriate adults to accompany the group. Ratios are dependent on the age of the pupils and the nature of the visit. Check with the HT or EVC for advice. Where possible, for a mixed group, you should take at least one male and one female staff member. All groups should be accompanied by a qualified first aider. **Unless agreed in advance with the HT, there must always be at least two members of staff on every visit, irrespective of group size.**
- **If transport needs to be booked, this must be done well in advance.**
- Once approved, letters should be sent home to parents as early as possible, with a permission slip for parents to sign.
- Dates of visits should be added to the school's shared calendar **and** the website calendar at the point that letters are sent home
- If you need cash to pay for bus fares/parking etc you need to inform the office in advance – there is not always cash available and Joyce will need to arrange this for you
- The school mobile phone is available for use on visits – see office to arrange.
- Ensure any medication children need (e.g. inhalers) is noted and is available

- Ensure best practice is maintained throughout – regular head counts and safe practice upheld. Do not take any risks and do not veer away from your risk assessment or itinerary.
- Take a first aid kit and report any incidents to school immediately.

After the visit

- Ensure all children are handed over to an adult if the parent has opted to have the child picked up from school. Two members of staff should always supervise handover.
- **If you are taking the school minibuses, they should be cleaned and tidied after your visit.** Check that you have left enough diesel in the bus for the next user and have recorded the mileage when you returned to school.

Reviewed Dec 2017

To be reviewed Dec 2019



Visit Leader Check List

<http://oeapng.info>

This checklist is designed as a final check on planning, or as a review tool for regular visits. The relevance of some of the points and the complexity of the responses are dependent on the nature of a particular visit. For each of the following bullet points further information about good practice can be found elsewhere in this guidance.

- ! The benefits and risks of all aspects of the visit have been considered and the visit plan has an appropriate balance with an acceptable level of residual risk.
- ! The visit plan has involved leaders and helpers before the visit and they are clear about what they are expected **to do** in order to manage the risks.

Content and Aims

- ! There are clear and well-considered learning objectives that are particular to the development of the group as a whole and individuals within it, which contribute to the wider curriculum or ethos of the establishment.
- ! Monitoring and post activity/visit review and evaluation arrangements are in place. The process has led to a visit plan addressing the following variables:

Staffing

- ! I am clearly identified as the Visit Leader and approved by the establishment.
- ! All members of the Visit Leadership Team are sufficiently confident and competent to fulfil their designated role.
- ! There are sufficient leaders to ensure effective supervision and deal with incidents and emergencies.
- ! All members of the Visit Leadership Team have received all relevant information on both the visit and the group.
- ! If accompanying leaders are taking a family member on the visit, there are arrangements to ensure that this will not compromise group management.
- ! I have kept my EVC informed during the planning process.

Appendix 1 – Visit Leader Checklist

Activities

- ! Activities are appropriate to the objectives of the visit and the nature of the participants.
- ! Appropriately competent activity leaders are in the Visit Leadership Team or a suitable Provider has been contracted to lead activities.
- ! There is a sufficient amount of suitable equipment for activities.

Group

- ! Parental consent is in place (where needed) and up to date contact details, medical information, dietary requirements and special needs are available and shared appropriately with the Visit Leadership Team and any relevant provider staff.
- ! Information has been provided to parents and young people to enable informed consent (where consent is required).
- ! Young people have been involved in the planning and risk benefit assessment process. Where this was not appropriate young people have been provided with information to know what to do and what is expected of them.
- ! Child protection issues are addressed.
- ! Inclusion issues are addressed.

Environment

- ! Environmental factors (weather, daylight hours, temperature, water levels etc) have been considered.
- ! Accessibility issues are addressed.
- ! Safety and security have been checked and considered.
- ! I have undertaken a preliminary visit if appropriate or required by establishment policy. In the absence of a preliminary visit I have sufficient information from other sources.
- ! There is access to first aid at an appropriate level.
- ! Where remote supervision will be used, the environment is suitable..
- ! Accommodation, where used, is safe, suitable and appropriate.
- ! Travel or transport arrangements are appropriate.
- ! There is a Plan B in place, where necessary.
- ! There is an emergency plan in place and leaders, helpers, participants, providers and emergency contacts have been given relevant information about it.
- ! Suitable insurance is in place.

Appendix 1 – Visit Leader Checklist

Finally

! The visit meets all relevant requirements of my employer and establishment policy/procedure.

! My decision is that this visit is appropriately prepared and should take place.

Appendix 2 – National Guidelines – Roles & Responsibilities



National
Guidance

<http://oeapng.info>

Requirements and Recommendations for Establishments

This document provides guidance for the following roles that are typical of many Establishments.

1. Management Boards and Governing Bodies
2. Heads and Managers
3. Educational Visit Coordinators (EVCs)
4. Visit and Activity Leaders
5. Assistant Leaders
6. Helpers
7. Volunteers
8. Parents

Establishments without these specific roles should interpret the guidance to meet their particular circumstances, ensuring that the key requirements and recommendations are met.

Management Boards and Governing Bodies

Members of a Management Board or Governing Body should view their main role as being "to enable and ensure"; otherwise described as being a "critical friend".

A Board/Governing Body should ensure that:

- They have a clear understanding of whether or not the Board/Governing Body itself is the employer of establishment staff, in which case the body will carry all the responsibilities of an Employer as well as an Establishment.
- The Establishment for which they are responsible has guidance in place, whether this has been put in place by the Employer (in which case there is no choice about the guidance to be followed), whether they need to create their own guidance, or whether they need to formally adopt the Employer's guidance (e.g. that of a local authority) and ensure that robust systems are put in place to support the implementation of the guidance.
- There is an Establishment Visit Policy, or wider policies in place that cover all aspects of Visits.
- Establishment policy clarifies any Board/Governing Body involvement in the visit approval process.
- There are training regimes in place to appropriately support the planning and delivery of visits and off-site learning.

3.1b February 2016

- There is a trained EVC in place who meets Employer requirements with sufficient time allowance to fulfil the role.
- There are approval procedures in place at Establishment level and notification procedures in place between the Establishment and the Employer as required by the Employer's guidance.
- The Establishment Visit Policy supports the principles of inclusion.
- There are monitoring procedures in place.

You can find further guidance in the document 3.4f *'Member of a Management Board or Governing Body'*.

Heads/Managers

Heads/Managers should ensure that Establishment practice follows the requirements and recommendations of their Employer's guidance. They should also have an Establishment Visit Policy that makes a formal statement linking their policy to their Employer's guidance, as well as setting out internal procedures to implement both policy and guidance.

Heads/Managers should be aware that the appointment of an Educational Visits Coordinator (EVC) is critical to the implementation of this guidance. All Establishments should have a currently validated EVC or be part of an Employer- approved EVC cluster.

The EVC should meet the criteria as defined and determined by their employer's guidance (see below).

Heads/ Managers should designate a named person to fulfil the role of EVC and agree sufficient time allowance to fulfil the role . They may choose to designate themselves. Where the Head/Manager has not designated a named member of staff, then the functions of the EVC will automatically be attached to those of the Head/Manager.

You can find further guidance in the document 3.4g *'Head Teacher/Manager'*.

Educational Visits Coordinators (EVCs)

Those appointing an EVC should ensure that the designated person has undertaken the EVC training required by their employer and that they meet any person specification recommended by the employer.

In order to carry out the full range of functions expected of an EVC (which may include taking a lead on approving Visit/Activity Leader competence), EVCs should have:

- Attended an Employer-led EVC Training Course and have revalidated this accreditation if that is required.
- Significant experience of practical off-site activity and visit leadership.
- Status within the Establishment that enables them to guide the working practices of their colleagues.
- Time agreed that is sufficient to fulfil the role.

The role of EVC cannot be seen as purely administrative. However, an Establishment may choose to send more than one member of staff to EVC training so that the administrative tasks can be separated from the operational functions.

The EVC should ensure that all off-site visits organised by their Establishment meet the requirements of their Employer's guidance, as well as the requirements of Establishment policy and procedures. EVCs should therefore be a focal point of off-site visit planning within their establishment. They should keep appropriate records of all visits and ensure that there is sample monitoring of provision. The EVC should:

- Ensure that there are establishment procedures for visits.
- Lead, or be involved with, the approval of leaders.
- Organise training and induction of Visit/Activity Leaders and Assistant Leaders.
- Ensure that there are administrative audit trails.
- Sample monitor activities to ensure that there is a match between policy/guidance and field operations (see "Monitoring" below).
- Ensure that systems and procedures are reviewed.

For an EVC to be effective, their full range of responsibilities and functions should be clearly stated in the Establishment's own Visit Policy. The policy should clarify:

- The role of the EVC in the formal approval process.
- Which visits are subject to EVC scrutiny.
- The nature of any visit monitoring (e.g. sample field monitoring, governor monitoring, peer monitoring etc).
- Which visits, if any, require consultation/approval from the Adviser.

You can find further guidance in the document 3.4j '*Educational Visits Coordinator (EVC)*'.

Visit and Activity Leaders

The Visit Leader has the overall responsibility for supervision and conduct of the visit. To ensure accountability and to avoid potential confusion, a single Visit Leader should be appointed. If this role changes during a visit, a clear handover should be made.

An Activity Leader is responsible for a particular activity during a visit.

The key requirements for Visit/Activity Leaders are that they must be accountable, and confident and competent to lead the visit/activity, not that they hold a particular post, title or job description.

Being **accountable** means that the Leader has been engaged through an appropriate recruitment process, which includes vetting and induction into the establishment's policies and procedures. The details of this process may depend upon whether the Leader is employed, contracted or acts as a volunteer, but in all cases should be thorough. Regardless of a Leader's employment status, they should understand the chain of accountability, what is expected of them, and the establishment's policies and procedures.

Being **confident** includes Leaders having the ability to take charge of a situation while being aware of, and understanding, their abilities, as well as their limitations.

Being **competent** means that the Leader has demonstrated the ability to operate effectively, and has sufficient relevant experience and knowledge of the activities, the group, and the environments in which the visit will takeplace.

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.

A Visit/Activity Leader **must** follow the employer's guidance and establishment policy and procedures.

A Visit /Activity Leader **must** ensure that the activity is properly planned and that the plan includes appropriate risk management procedures based on a risk-benefit analysis.

A Visit/Activity Leader **must** ensure that the roles and responsibilities of other staff (and young people) are properly defined and communicated, ensuring effective supervision.

You can find further guidance in documents 3.4k '*Visit or Activity Leader*' and 3.2d '*Approval of Leaders*'.

Assistant Leaders

Assistant Leaders should be:

- Accountable, as described above.
- Suitably competent and knowledgeable about establishment and employer policies/procedures, insofar as they affect the responsibilities they have been assigned.
- Specifically competent and confident to carry out such tasks as they are assigned, and to take over if the Visit Leader is incapacitated.
- Fully briefed to ensure that they understand the role and responsibilities expected of them.

The exact competence requirements should be guided by the risk management process.

You can find further guidance in the document 3.4l '*Assistant Leaders*'.

Helpers

Helpers should be:

- Subject to an appropriate vetting decision by Heads/Managers.
- Used appropriately and not used to replace an assistant leader.

3.1b February 2016

- Suitably competent and confident to be able to carry out the duties they are assigned.
- Confident in their understanding of the role and responsibilities that they have been assigned and how these integrate with other staff.
- Enabled to contribute to the evaluation of all aspects of the visit.
- Appropriately briefed on:
 1. Relevant establishment and visit procedures.
 2. Group characteristics, including age, health, capabilities, special educational needs, behaviour and any other relevant matters in the context of the visit.
 3. Nature, location, and aims and objectives of the activity.

Where the Helper is a Parent (or otherwise in a close relationship with a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise group management, particularly if there is a serious incident. There is a probability that the Helper may be distracted by the needs of their own child, rather than looking to the needs of the whole group. This means that the Visit Leader should directly address this issue as part of the risk-benefit assessment and not assign a Helper to a leadership role which gives them a direct responsibility for their own child, other than where this is a risk-managed part of the Visit plan.

You can find further guidance in the document 3.4m 'Helper'.

Volunteers

Depending upon an Employer's policies, a volunteer may take any role in a visit, including Visit Leader, Assistant Leader, Activity Leader, Helper. Whichever role they are used in they must meet the requirements of that role.

Parents

Parents should be aware of the following:

- Their right to full information.
- Their need to provide full information about their child.
- The requirements for parental consent (where applicable).
- The need for Parents and young people to have a proper understanding of behavioural expectations and sanctions which may be set out in a Code of Conduct.
- The need to provide a 24/7 home emergency contact number.

You can find further guidance in the document 3.4n 'Guidance for Parents'.

