

## Educational Visits Policy

### **Distribution:**

All Head Teachers, Educational Visit Co-Ordinators, Visit Leaders and teachers in Community Controlled, Trust, Voluntary Aided & Academy Schools using the Council Educational Visits Advisory Service.

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## **1 Introduction**

- 1.1 Newcastle City Council recognises the value of outdoor activities and educational visits to children and young people. The Council fully supports and encourages visits and activities that are appropriately assessed, planned and managed.
- 1.2 This policy has been produced to help make visits enjoyable, rewarding and as safe as possible. It is not intended that the policy will reduce the number or range of educational visits and outdoor learning opportunities but will instead encourage continued safe practice by all those involved.
- 1.3 This policy applies to all Schools that use the Newcastle City Council Educational Visits Advisory Service, and any extended school provision run by these schools.
- 1.4 This Policy sets out the framework and standards for all educational visits and activities away from the school base. It applies regardless of when the visit or activity takes place and includes: educational visits, outings, visits to parks, libraries, museums, sporting fixtures, cultural recreational and exchange trips, outdoor adventurous activities, residential visits and field trips etc. This isn't an exhaustive list.
- 1.5 Although this policy has been designed for use by schools and extended school provision, it can also be adopted to manage visits and activities organised for children in other settings. Where managers of children's care settings and services wish to utilise this approach, they should ensure that relevant staff have been appointed to fulfil the roles set out in the policy, such as by identifying an Educational Visit's Co-ordinator (EVC) and someone with the appropriate authority to act as the role of 'Head', who can provide authorisation for trips to take place. The Health and Safety section can be contacted for further advice and guidance.
- 1.6 Schools should ensure that the contents of this policy align with local school policies and procedures. This is especially important where the school belongs to a Multi-Academy or group Trust, where overarching visit policies may exist.

## **2 Educational Visits Advisory Service (EVAS)**

- 2.1 The EVAS is delivered by professional H&S Officers from the Schools H&S Team. Contact details for the Schools H&S Team are available from the Evolve contact information pages.
- 2.2 The service delivered by EVAS includes:
  - The provision of this policy on Educational Visits. This provides a management framework for school educational visits and is available on the Services to School's H&S Webpages.

- Provision of H&S advice in relation to visit planning and assessment processes.
- Facilitation of initial training for Educational Visits Co-ordinators (EVCs), Visit Leaders and Assistant Visit Leaders as well as re-validation training for EVCs after 3 years.
- Independent scrutiny and validation of the assessment & planning processes for category 3 (higher risk visits - see section 13) to confirm that assessments and planning processes are satisfactory.
- Approving assessment & planning processes for category 3 (high risk visits – see section 13) in Community Controlled Schools to confirm they are satisfactory.
- Assessment of Activity Leaders for Adventurous activities (see section 17)

### 3 EVOLVE

- 3.1 The service delivered by EVAS is supported by EVOLVE, an online information management system used for the notification, approval and monitoring of visits and adventurous activities.
- 3.2 EVOLVE provides an auditable record trail and enables Head Teachers and EVCs to monitor the assessment and planning processes carried out for each visit.
- 3.3 It's recommended that all visits (in categories 1-3, see section 13) be recorded on Evolve, **but as a minimum all Category 2 and 3 visits must be recorded on EVOLVE.** NB - Category 3 visits are automatically notified to the EVAS for independent scrutiny of the assessment and planning processes.
- 3.4 Where schools choose not to enter visits in category 1 on EVOLVE, they must ensure that records are kept in another appropriate format and be available for inspection.
- 3.5 Schools may decide to upgrade to EVOLVE+ at additional annual cost. This provides an optional suite of features designed to further assist schools such as by linking to the school MIS system to synchronise data. More information on the additional EVOLVE+ features can be found on EVOLVE.

### 4 Outdoor Education Advisers Panel (OEAP) – National Guidance

- 4.1 This policy adopts and is underpinned by the national standards and advice provided by the Outdoor Education Advisers Panel on Educational visits.
- 4.2 All Schools using the Council's Educational Visits Advisory Service are therefore expected to 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](http://www.oeapng.info).

## 5 Legal Requirements

5.1 The employer carries ultimate legal responsibility for ensuring the health and safety of all pupils and staff in relation to day-to-day activities and educational visits.

The employer is the governing body in Foundation Trust and VA schools, the LA in Community Controlled schools, and the Trust/trustees in academies/multi-academy trusts.

5.2 In all schools the senior management team and governing body have a legal duty to ensure the safety of all pupils and staff when taking part in outdoor learning/education visits.

It is strongly recommended that Head Teachers and Governing bodies in these schools familiarise themselves with the management framework set by this policy and those set by the OEAP and comply the principles detailed to ensure the safety of pupils and staff when arranging visits.

5.3 In broad terms all schools should have adequate arrangements in place to:

- Ensure staff with key roles are appropriately trained, experienced and competent in relation to their roles
- Assess the risks
- Implement sensible, proportionate control measures to reduce risks to an acceptable level. Residual risks should be acceptable based on benefits likely to be gained.
- Provide adequate levels of supervision
- Communicate arrangements to all parties
- Identify emergency support arrangements
- Record, investigate and report accidents and incidents.
- Check and monitor that assessment, planning and control arrangements are implemented
- Review outcomes and consider lessons learnt.

5.5 Risk assessments must be recorded where significant risk of harm/injury has been identified. Blank risk assessment forms are available in the NCC Guidance tab, within the Resources section of EVOLVE. The blank template contains advice on how to complete the form and an assessment example is available for guidance.

## 6 Inclusion and Equality

6.1 Visits should be available to all children and young people regardless of background or abilities. Schools must ensure that their provision meets the requirements of the Equality Act 2010 and Special Educational Needs and Disability Act 2001. Guidance on inclusion can be found on the OEAP website.

## 7 Role Specific Responsibilities

7.1 OEAP National Guidelines set out responsibilities and functions for the [following post holders](#), which should be followed:

- Member of Board of Governors - section 8
- Head Teacher – section 9
- Educational Visits Co-ordinator (EVC) – section 10
- Visit/Activity Leader – section 11
- Assistant Visit Leader- section 11
- Volunteer Adult Helper- section 11

## 8 Governing Bodies and Trusts

8.1 In Foundation Trust, Voluntary Aided and Academy Schools, governing bodies should ensure that the School's local Educational Visits Policy clarifies the visit approval process, in particular where approval for visits is delegated to the Head Teacher and where for some visits final approval from governors or trustees may be required.

## 9 Head Teachers Role & Responsibilities

9.1 It is expected that [Head Teachers](#) will comply with their roles and responsibilities outlined in the national guidelines provided by the OEAP and ensure:

- Staff are appropriately trained, experienced and competent in relation to their roles.
- An EVC is appointed (see section 9.3)
- A competent, confident and accountable Visit Leader is appointed for each visit, who has been assessed to ensure suitability to lead on the relevant trip. Where they are leading on adventurous activities, evidence of competence should be added to the trip submission, which will be checked by the EVAS team as appropriate when assessing Category 3 visits, prior to validation (see section 17)
- The school has in place a suitable local Educational Visits Policy and procedures for their school. These should supplement this Educational Visits Policy and include clarification on:
  - Any blanket arrangements that should be applied to lower risk (category 1) visits, such as a generic school trip risk assessment,
  - Whether final approval for all visits rests with the Head Teacher or (where relevant) whether certain visits require approval from the governing body or the Trust,
  - Whether EVOLVE is used for all visit categories,
  - Assigning a risk category (1-3) to all visits undertaken by the school using the criteria in section 13,
  - The local procedures for carrying out assessments, planning, approval and monitoring processes for visits and adventurous activities arranged by the school,
  - Emergency response and support arrangements.
  - Arrangements for training staff.

- Sufficient time is given for assessment, planning and approval processes ahead of visits.
- Visit risks are adequately assessed.
- Sensible control measures, are identified and implemented including ensuring:
  - Provision of adequate levels of supervision,
  - Control measures/precautions are proportionate to the risk,
  - Communication of arrangements to all parties,
  - School based emergency support arrangements are in place.
- They authorise Category 3 visits in Evolve at least **four** weeks prior to the visit.
- They approve category 1 and 2 visits. Blanket approval arrangements outlined in the schools own Educational Visits Policy are normally sufficient for category 1 visits.
- Accident recording, investigation and reporting arrangements are in place.
- Checking and monitoring arrangements to confirm that visit assessment and planning arrangements are appropriate. This is normally undertaken by the EVC.
- A mechanism is in place for reviewing the adequacy of visit assessment and planning processes, visit and learning outcomes and that considers lessons learnt.

9.2 Guidance on writing a local [Educational Visit's Policy](#) is available on the OEAP national guidelines website.

9.3 It is expected that the role of the EVC will be fulfilled by a member of staff with sufficient authority and credibility to challenge and influence the safe planning around educational visits. When selecting an EVC, Head Teachers should therefore ideally appoint a member of the school's senior management team with previous practical experience in leading and managing a range of visits similar to those typically run by the school. The person appointed should attend EVC training, to be considered competent.

9.4 In order to gain a greater understanding of the assessment and planning processes Head Teachers are also encouraged to attend EVC training.

9.5 It should be noted that the Visit Leader, EVC and Head roles should be performed by different individuals to ensure robust internal challenge of arrangements takes place at each stage of trip submission, for each visit. Heads are therefore advised to ensure that appropriate staff are selected for each role.

## 10 Educational Visits Co-ordinators (EVC) Role & Responsibilities

10.1 It is expected that an EVC will be appointed by the Head Teacher where schools plan, organise and deliver educational visits and off-site activities.

10.2 It is expected that EVCs will comply with their roles and responsibilities outlined by the OEAP <http://oeapng.info/evc/>.



10.3 EVC must attend EVC training, which is re-validated every 3 years. Courses are organised periodically by EVAS, which will be advertised on EVOLVE and Services to Schools.

10.4 The EVC will:

- Support the Head Teacher to develop and review the Schools local Educational Visits Policy and generic risk assessment for visits in category 1.
- Liaise with the Visit Leader to ensure assessment and planning processes for category 3 visits are completed in a sufficiently timely manner to enable the visit to be authorised by the Head Teacher in Evolve at least four **weeks** prior to the visit. Visit details will automatically be notified to EVAS.
- Liaise with the Visit Leader to provide further information, where additional detail is requested for a category 3 visit by the EVAS team.
- Obtain final approval from the Head Teacher for all visits in categories 1, 2 and 3. Blanket approval arrangements for visits in category 1 should be covered in the School's Educational Visits Policy.
- Ensure that any Visit Leader appointed is competent, confident and accountable for the visit being led. Where the Visit Leader will be leading an adventurous activity, appropriate evidence of competence should be added to EVOLVE for review by the EVAS team (see section 17).
- Monitor the planning, assessment and approval processes for all visits to confirm compliance with this Policy and the School's Educational Visits Policy
- Ensure that this policy, [Outdoor Education Advisers' Panel guidance](#) on visit standards etc. and the Educational Visits Policy, procedures and assessments produced by the school are available to and followed by all parties involved in planning educational visits.
- Keep appropriate records of visits and make these available when requested for inspection.
- Deliver induction briefings on the School's Educational Visits Policy, procedures and generic risk assessment for new staff who may be involved in school visits.
- Consider whether training is required for assistant/visit leaders and liaise with EVAS to arrange.
- Be the principal contact with and seek advice where appropriate from EVAS for visits and adventurous activities.

## 11 Visit Leader Role & Responsibilities

11.1 The Visit Leader has overall responsibility for the assessment, planning, supervision, conduct and safety of young people on the visit or adventurous activity.

11.2 It is expected that the Visit Leader will comply with their roles and responsibilities outlined in the OEAP national guidelines and will:

- Where necessary undertake pre-visits

- Undertake a risk assessment, where required for category 2 and 3 visits, identifying the main risks and identify as part of a thorough planning process how these will be controlled,
- Inform parents in advance of the nature of the visit and gain their consent and details of medical requirements,
- Continually assess risks during the visit and encourage young people to take an active role in this process.

- 11.3 The Assistant Visit Leader should support the Visit Leader and be capable of taking over from the Visit Leader whenever this may be necessary. They should therefore hold the correct level of competence required for the role.
- 11.4 It is strongly recommended that Assistant/Visit Leaders undertake Visit Leader Training, which is refreshed as necessary, to improve and demonstrate competence. This should be delivered by a suitably competent person such as an Outdoor Education Adviser.  
Details on recommended training courses for Assistant/Visit Leaders can be found on EVOLVE.
- 11.5 Where volunteers are used to assist with visits and trips it is essential they meet the requirements of the roles they are assigned, they are subject to appropriate levels of vetting and induction, and they are sufficiently competent and confident to undertake the role.
- 11.6 OEAP National Guidance provides further detail on each of these roles.

## **12 Local Authority Educational Visits Advisors**

- 12.1 The role of the Local Authority Education Visits Advisor is to provide advice, guidance and support to schools that have purchased the Council's EVAS Service.
- 12.2 Local Authority Education Visits Advisors are part of the EVAS Team and are all members of the Outdoor Education Advisor's Panel, following the principles and approaches detailed in National Guidance.
- 12.3 As detailed under the following section, the EVAS Team will validate/approve the arrangements for category 3 adventurous visits once the assessment and planning processes have been scrutinised and any queries addressed. Where issues are identified, EVAS will advise accordingly in-line with expected standards.
- 12.4 In Foundation Trust, Voluntary Aided and Academy Schools final approval for a trip to take place remains with the Head, governing body or Trust in accordance with the overarching Educational Visits policy in place. The EVAS Team will validate trips to support this decision where it is felt that appropriate measures are in place to enable a trip to take place safely. Where concerns are identified, these will be highlighted via the Evolve system.



12.5 In Local Authority controlled Community Schools, approval for Category 1 and 2 trips remains with the Head, however Category 3 adventurous visits must only be permitted to take place where approval has been granted by the EVAS Team.

### 13 Visit Categories and Approval Processes

13.1 For the purposes of EVAS notification and approval visits are grouped into three categories.

Category	Definition	Requirement for Notification, Validation & Approval
1	<p>These are routine non-complex low risk visits.</p> <p>Examples include visits to libraries, theatres, museums etc</p> <p>They are covered by:</p> <ul style="list-style-type: none"> <li>• Generic Risk Assessment</li> <li>• School's local Educational Visits Policy &amp; procedures, (including blanket approval by Head Teacher for these visits).</li> <li>• Blanket informed parent/carer consent.</li> </ul>	<p>Blanket approval for visits in this category is normally provided by the Head Teacher in the school's Educational Visits Policy, including staff authorised to lead such visits.</p> <p>Recommended that EVOLVE be used to record documents.</p>
2	<p>Visits which require enhanced planning, due to the presence of a specific risk/s.</p> <p>These visits include:</p> <ul style="list-style-type: none"> <li>• All residential visits not in Category 3.</li> <li>• All other non-residential visits not in categories 1 or 3</li> </ul> <p>They require:</p> <ul style="list-style-type: none"> <li>• A visit specific risk assessment, including:</li> <li>• Visit specific informed parental consent.</li> <li>• School's local policy &amp; procedures to be followed.</li> </ul>	<p>Must be approved by Head Teacher, normally on an individual visit basis.</p> <p>EVOLVE must be used for all visits in category 2, to record documents and provide an auditable trail.</p>
3	<p>Higher risk visits defined as:</p> <ul style="list-style-type: none"> <li>• Visits outside the UK</li> <li>• Visits which include adventure activities (see section 15).</li> </ul>	<p><b>Approved by the Head Teacher / Governing Body (in accordance with the schools Educational Visits Policy) must</b></p>

	<ul style="list-style-type: none"> <li>• Visits to remote or hazardous locations</li> </ul>	<p><b>authorise the visit in Evolve a minimum of 4 weeks before the visit. EVAS will receive automatic notification of the visit.</b></p> <p>EVAS carry out independent scrutiny and will raise any relevant queries to confirm that assessment and planning processes are reasonable and proportionate to the risks. Visit arrangements will be validated/approved after any queries have been addressed.</p> <p><b>Please note: In Local Authority controlled Community Schools, the Head must only permit category 3 trips to go ahead where approval has been granted by the EVAS Team.</b></p>
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- 13.2 Schools running Duke of Edinburgh's Award (DofE) expeditions must follow the approval processes and timescales outlined for the different categories of visit. Visit Leaders for DofE expeditions considered to be adventurous are required to have approval from EVAS using Evolve, as per section 17.
- 13.3 It is expected that the EVC or Head Teacher will seek further advice from EVAS when necessary, during the planning process.
- 13.4 Category 3 visits must be authorised in EVOLVE by the Head Teacher and notified to EVAS at least **four weeks** prior to the visit. This is to provide time for any issues identified to be addressed by the school prior to validation being given by EVAS.
- 13.5 For more complex visits, more time should be allowed. Schools are encouraged to ask the Educational Visits Advisory Service to comment on unsubmitted draft plans in EVOLVE for complex visits at an early stage, which could be a year or more prior to the visit.
- 13.6 Schools are advised not to sign contracts with providers or make commitments to participants or parents/carers until they're sure that requirements for validation/approval can be met.

## 14 Late Submissions

- 14.1 As outlined under section 13, category 3 visits must be submitted to the Local Authority EVAS Team with sufficient time for assessment and to enable any queries or concerns to be fully resolved in advance of the trip date. Submission with **at least 4 weeks in advance** of the trip is therefore required.
- 14.2 The EVAS Team will always endeavour to review all trips submitted, but where submissions are received with **less than 4 weeks' notice**, the EVAS assessor reserves the right to process the trip un-assessed and not mark it as validated or approved, if it is determined that insufficient time has been provided to enable a full and proper review of documentation.  
In such instances, the Head must determine whether sufficient assurances have been provided that appropriate health and safety management arrangements are in place to permit the trip to go-ahead without 3<sup>rd</sup> party scrutiny by EVAS.  
In Local Authority controlled Community Schools, visits involving category 3 adventurous activities should not take place unless approval has been granted by the EVAS team.
- 14.3 Where trips have been returned for additional information, sufficient time is still required in order to review additional information. For this reason, even where a submission has been submitted within the 4 week deadline, where it has been returned for additional information the re-submission should be made **with at least one week prior to the visit date**.
- 14.4 Please note that the EVAS Team reserve the right to introduce additional financial charges to review submissions not received within the appropriate timescales.

## 15 Adventurous Activities

- 15.1 Adventurous activities include activities carried out in remote or hazardous locations and are defined by the OEAP as:
- Abseiling
  - Air activities (excluding commercial flights)
  - Camping
  - Caving, potholing, mine exploration
  - Climbing (including indoor climbing)
  - Coasteering, coastal scrambling, sea-level traversing
  - Fishing in hazardous environments (e.g. sea, fast rivers, or deep water)
  - High level ropes activities
  - Horse riding & equestrian sports
  - Motor sport – all forms
  - Off road cycling/mountain biking
  - River/gorge/gyhll walking or scrambling, canyoning
  - Shooting, archery, paintballing

- Skiing and snowboarding (including indoor or dry slope)
- Snorkel or aqualung activities
- Swimming (all forms, excluding UK public pools with lifeguards)
- Walking (hills, mountains, open country)
- Water sports – powercraft, water skiing (excluding commercial transport), canoeing, kayaking, rafting or improvised rafting, rowing, sailing, surfing, wind surfing, kite surfing.
- Extreme sports
- Other activities (eg. initiative exercises) involving skills inherent in any of the above.

15.2 Remote or hazardous locations include:

- Areas more than 30 minutes' walk from a road or refuge.
- Coastal areas with significant tidal hazards
- Quarries.
- Steep terrain

15.3 These lists aren't exhaustive, please contact EVAS for further information if you are unsure if an activity may be classed as adventurous.

## 16 Outdoor Education (OE) Forms

16.1 The EVAS Team have developed a series of forms to be used during the assessment of visits and trips. These are available in the documents section of Evolve and cover a range of trip types, in addition to general arrangements that can be applied to all visits.

16.2 The purpose of the OE forms is to support the visit planning process and prompt the provision of information in EVOLVE on planning issues often missed from trip risk assessments and reduce the likelihood of trip submissions being returned for further information.

16.3 When an assessor requests completion of relevant OE forms as part of a returned submission, this may be to address gaps in the submitted documentation or to gain assurance that all relevant aspects of trip planning have been considered. It is strongly advised that schools complete relevant OE forms and include them as part of the initial trip submission process, to streamline the validation process without a request for further information.

16.4 OE forms currently available include:

- OE1 Educational Visits Planning Checklist- For general use applicable to all trips,
- OE2 Adventurous Trips- Supplemental checklist for category 3 trips,
- OE3- Overseas Trips- Supplemental checklist for visits abroad,
- OE4- Duke of Edinburgh Awards- Supplemental checklist for D of E related activity.

## **17 Visit Leader Competence and Approval**

- 17.1 Staff wishing to lead on the actual undertaking of an adventurous activity without a provider (see section 15) must be competent to do so. Supporting evidence must be uploaded to EVOLVE to demonstrate competence, which relates to the specific activity being undertaken. For such trip submissions, the need for an Activity Leader Form (ALF) will be prompted as part of the EVOLVE process. Head Teachers are responsible for initial approval of adventurous activity Visit Leaders for the school. The EVAS Team will review submissions and the evidence of competence provided on the ALF form. Appropriate qualifications, training and experience must be available where relevant, to enable trip validation.
- 17.2 Guidance on appropriate qualifications for leading and advising on the various adventurous activities can be found in the OEAP guidance document- Adventurous Activity Qualifications, available on their website.
- 17.3 Head Teachers are responsible for approving all other Visit Leaders. Head Teachers must ensure that all Visit Leaders and Assistant Leaders are competent to fulfil their roles and responsibilities before approving them to lead educational visits. Head Teachers should refer to the OEAP guidance documents on the following subjects (available from their website), which provides advice (including competency/qualifications matrix) to assist in this decision:
- Approval of Leaders
  - Good Practice Basics
- 17.4 Further advice is available from EVAS if there is doubt regarding the competence of a member of staff to lead an educational visit.

## **18 Minibus Driving and General Transport Arrangements**

- 18.1 Eligibility to drive a minibus is set out in guidance on driving minibuses available from the DfE and OEAP, which can be accessed from the Resources section of EVOLVE. Schools must ensure they comply with this guidance.
- 18.2 Schools should ensure that drivers new to driving minibuses are given familiarisation training/instruction to ensure they are competent and able to safely manoeuvre the vehicle, prior to driving a group of children.
- 18.3 It is recommended that school staff who drive a minibus receive MIDAS or equivalent training to improve confidence and competence, and that this is refreshed at appropriate intervals.
- 18.4 Regardless of the transport method used, Schools are expected to consider contingency plans in the event of vehicle breakdown, accident or cancellation that could leave the group stranded. Risk assessments should reflect procedures to keep people safe in such eventualities and arrangements planned that would ensure the ability to organise rescue and, if necessary, onward travel by another means.

The extent of planning should be proportionate to the intended geographical location of the visit and the intended mode of travel.

For example:

- Public transport may be a feasible contingency plan for local area visits,
- Coach companies may have arrangements in place to provide alternative vehicles for national travel,
- Breakdown assistance can be organised for school vehicles,
- Insurance cover may facilitate lodgings and return travel for overseas trips.

Schools are responsible to ensure such arrangements are in place.

N.B. Although EVOLVE contains names of regularly used travel companies to assist when completing trip forms, these have not been assessed by NCC and inclusion is not an indication of endorsement.

## **19 Emergency Planning & Critical Incidents**

19.1 A critical incident is an incident where a participant in a visit:

- Has suffered a life-threatening injury or fatality,
- Is at serious risk,
- Has gone missing for a significant and unacceptable period of time.

19.2 It is essential that schools should have their own emergency arrangements in place as part of the planning arrangements for each visit, to enable them to respond to a critical incident both inside and outside normal school hours.

19.3 Please note, EVAS does not provide an out of hours support service. In the unlikely event that a school requires out of hours support that can't be provided by the Head Teacher, the Business Continuity Risk & Resilience Team can be contacted for guidance and advice on mobile: 07736372567.

## **20 Plan B Considerations**

20.1 Unforeseen factors can cause plans to change, so schools must consider what action will be taken and replacement activities undertaken if intended plans become unviable, such as due to adverse weather conditions or cancellation by an activity provider. In some instances, there may be no choice in such circumstances other than to cancel a trip.

20.2 Where alternative activities are to be devised as a replacement for any validated category 3 activities that can no longer be undertaken, schools must ensure that Visit Leaders do not organise alternative adventurous activities via an unchecked provider as a replacement for those cancelled, which will not have been subjected to appropriate planning and vetting processes.



## **21 Accident Recording, Investigation and Reporting**

- 21.1 Schools must undertake an investigation following any accident or critical incident to determine causation and prevent a recurrence.
- 21.2 Where schools purchase the Health and Safety Support SLA from the Council in addition to the EVAS service, the Council's accident recording and reporting procedure should be followed for all accidents on visits involving staff, pupils or volunteer helpers. Accidents then be screened by the School H&S Team and reported to the Health and Safety Executive where necessary.  
Accident report forms and guidance on conducting an investigation are available from the Schools H&S Resource pages on Services to Schools..
- 21.3 Schools with separate arrangements for H&S Support should follow their own local reporting procedures.
- 21.4 In all cases, the EVAS Team should be notified of any accidents or incidents to determine whether additional action may be needed to prevent a recurrence and to ensure any lessons learnt can be shared with other schools, where relevant. The EVAS Team should be made aware as soon as practical in cases where there has been a serious injury or fatality.

## **22 Supervision**

- 22.1 Guidance on supervision levels is provided by the OEAP in their documents:
- Ratios and Effective Supervision
  - Group Management & Supervision
- 22.2 Supervision ratios and types of supervision should be determined as part of the risk assessment process taking account of factors such as:
- Age of the group
  - Gender issues
  - Ability of the group (including special needs, behavioural, medical and vulnerability characteristics etc)
  - Nature and location of the activity (type of activity, hazard levels, skill levels involved, time of year, conditions etc)
  - Staff competence

As part of this process consideration should be given to ensuring appropriate supervision arrangements are in place during downtime, where relevant, and that regular headcounts or rollcalls take place at appropriate times for monitoring and reassurance purposes.

## **23 Assessing Venues and Providers**

- 23.1 Visit Leaders and EVCs must follow OEAP guidance on preliminary visits and provider assurances.

- 23.2 The Learning Outside the Classroom Quality Badge provides sufficient reassurance that a provider meets nationally required minimum standards of safety and quality. Details of a providers' status can be checked on the Quality Badge website. [www.lotcqualitybadge.org.uk](http://www.lotcqualitybadge.org.uk).
- 23.3 It is important to note that if a provider does not have the Learning Outside the Classroom Quality badge for a category 3 adventurous activity, then a **Provider Statement Form must be completed**.  
For category 2 visits, proportionate checks should still be made on providers to ensure appropriate accreditation is in place or, where no accreditation is held, suitable arrangements are in place that provide assurance regarding the safety of the provision. The completion of Provider Statement Forms may still be appropriate for category 2 visits, with the extent of checks dependent on the location involved and activities being undertaken.

Further guidance on assessment of providers and facilities can be found in the OEAP guidance 4.4g- 'Selecting External Providers and Facilities'.

## 24 Monitoring

- 24.1 Head Teachers are responsible for ensuring that appropriate arrangements are in place at local level to monitor that the assessment and planning processes are being followed and arrangements are adequate and proportionate to the risks. Monitoring is normally undertaken by the EVCs, or another member of the senior management team to provide challenge and assurance that processes are robust. Monitoring can include:
- Desk top review of records involved in the assessment, planning and approval process, undertaken on a sampled basis,
  - Direct observation of a visit in progress.

## 25 Unaccompanied Visits

- 25.1 Unaccompanied expeditions, where young people undertake a journey without direct supervision or leadership, form part of some youth award schemes, such as Duke of Edinburgh. However, unaccompanied expeditions are NOT unsupervised. Other forms of supervision such as indirect or remote supervision techniques must still be in place to ensure that staff can monitor, intervene and assist if necessary.  
Although in some instances an element of supervision may at times be handed over to competent providers, the school retains a duty of care to students during any trip and must provide an oversight and monitoring role to ensure health and safety arrangements in place are appropriate.
- 25.2 For the reason above, the EVAS Team are not able to validate or approve trips organised by the school where no staff will be available to monitor and support students and where there is an expectation that a third party will take full control and responsibility for pupils. An allocated School Visit Leader must always be identified and present, employed directly by the school or Trust, to monitor arrangements and provide a direct point of contact if pupils require assistance or support.

## **26 Reviewing Visits**

- 26.1 Schools must have arrangements in place to review the outcomes of visits, including learning outcomes and to consider any lessons learnt. This is essential where visits have involved accidents or a critical incident.
- 26.2 Reviews should occur immediately following any visit involving an accident or critical incident but otherwise may occur at appropriate intervals during the course of the year after a number of visits have occurred.

## **27 First Aid**

- 27.1 For each off-site visit or trip, schools are expected to assess first aid needs. Factors to consider may include the risks presented by the activity, access to first aid support at the location being visited, downtime arrangements, remoteness of activities etc. The Visit leader should be considering needs on a case-by-case basis and determining appropriate first arrangements for each specific trip.
- 27.2 It is not necessary to have a qualified first aider on every visit but a very basic level of first aid support must be available at all times. Trained first aiders and the provision of first aid kits would be recommended where the activities present an increased risk of injury and staff will be relied on to provide assistance.
- 27.3 It is important to note that the only exception to this guidance is for Early Years, where there is a statutory requirement to have at least one trained paediatric first aider in attendance on each visit.
- 27.4 Further guidance is available in the OEAP Guidance 4.4b- 'First Aid' and in the DfE guidance 'First aid in schools, early years and further education' which is available from the gov.uk website.

## **28 Combined Cadet Force (CCF)**

- 28.1 Schools operating a CCF in conjunction with the armed forces (Royal Navy/Royal Marines, Army or the Royal Air Force) may experience difficulties when using the EVAS service to assess Category 3 activities and trips relating to their CCF operations. This is due to assessment and assurance processes in place by the Ministry of Defence often duplicating the systems in place under this policy.
- 28.2 As it is acknowledged that robust systems are in place for CCF specific activities, schools operating a Combined Cadet Force are given the option to reduce visits and trips subject to CCF assessment process to Category 2, which can then be authorised internally by the school.  
This would require an annual CCF submission to the Evolve system, with relevant documents attached as evidence of robust management systems, such as:
- A completed EVAS CCF Annual Assurance form
  - A signed, up to date copy of the Memorandum of Understanding between the school and the MoD.

- Copies of documentation templates used for CFF activities (such as Cadet Acton Safety Plan (CASP) and Exercise Action Safety Plan (EASP))
- Risk Assessment Proformas and Activity Codes of practice etc.

28.3 Schools interested in discussing a re-categorisation of CCF activities should contact the EVAS Team to discuss further. Contact details can be found in EVOLVE.

## **29 Insurance**

29.1 Schools must ensure that they have appropriate insurance arrangements in place for all educational visits. Guidance on insurance is available from the OEAP website.

29.2 Schools are strongly recommended to arrange Cancellation and Personal Accident cover for educational visits unless they already have blanket insurance cover in place. This should cover cancellation of contracts with providers in the event of travel difficulties, illness/injury to participants or their families. Any exclusion clauses should be carefully checked.

## **30 Further Advice & Information**

30.1 Further information and advice is available from the EVAS delivered by the Schools H&S Team, contact details are on the Schools H&S website or EVOLVE.

## **31 Glossary of Terms**

EVAS - Educational Visits Advisory Service

EVC - Educational Visits Co-Ordinator

OEAP - Outdoor Educational Advisers Panel

LotC - Learning outside the Classroom Quality Badge

CCF- Combined Contingent Force

OE form- 'Outdoor Education' series of forms