People Directorate	Educational Visits Policy
Distribution: All Head Teachers, Educational Visit Co-Ordinators, Visit Leaders and teachers in Community Controlled, Trust, Voluntary Aided & Academy Schools.	

Index

Section	Content	Page
1	Introduction	2
2	Educational Visits Advisory Service (EVAS)	2
3	EVOLVE – Information management system	3
4	Outdoor Education Adviser's Panel (OEAP) – National Guidance	3
5	Legal Requirements	3
6	Inclusion & Equality	4
7	Role Specific Responsibilities	4
8	Governing Bodies	4
9	Head Teacher's Role & Responsibilities	4
10	Educational Visits Co-ordinators' (EVC) Role & Responsibilities	5
11	Visit Leaders' Role & Responsibilities	6
12	Visit Categories	7
13	Adventurous Activities	8
14	Visit Approval Processes	9
15	Visit Leader Competence & Approval	10
16	Minibus Driving	10
17	Emergency Planning & Critical Incidents	10
18	Accident Recording, Investigation & Reporting	11
19	Supervision	11
20	Assessing Venues & providers	11
21	Monitoring	12
22	Reviewing Visits	12
23	Auditing	12
24	Insurance	12
25	Further Advice & Information	12
26	Glossary of Terms	12

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, managed and conducted.

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 educational visits and activities organised by Community Controlled, Trust, Voluntary Aided & Academy Schools and 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.

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 Schools H&S website.

2.2 The service delivered by EVAS includes:

- The provision of this policy on Educational Visits. This provides a management framework for schools educational visits and is available on the Schools 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 validation and scrutiny of the assessment & planning processes for category 3 (high risk visits - see section 12) in Trust, Voluntary Aided and Academy schools to confirm that assessments and planning processes are satisfactory.
- Approving assessment & planning processes for category 3 (high risk visits – see section 12) in Community Controlled Schools to confirm they are satisfactory.
- Approving Activity Leaders for Adventurous activities (see section 15)
- Auditing management arrangements for educational visits on a sampled basis.

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 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 12) be recorded on Evolve, **but as a minimum all Category 2 and 3 visits must be recorded on EVOLVE.** These 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 categories 1 and 2 on EVOLVE, they must ensure that records are kept in another appropriate format and be available for inspection.

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 **It is strongly recommended that all Trusts, Voluntary Aided and Academy Schools will buy into the Council's Educational Visits Advisory Service and will 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.**

4.3 **The Local Authority is the employer in Community Controlled schools. Therefore it is expected that all Community Controlled Schools will comply with this policy and will 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.

5 Legal Requirements

5.1 The Governing body is the employer in Academies, Trust and VA schools and therefore 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.

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

5.3 In Community Controlled 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.

5.4 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 Risks assessments must be recorded where significant risk of harm/injury has been identified. Blank risk assessment forms and general advice on how to carry out risk assessments are available from the Council's H&S website.

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 Equalities 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

8 Governing Bodies

8.1 In Trust, Voluntary Aided and Academy Schools, governing bodies should ensure that the Schools local Educational Visits Policy clarifies where approval for visits is delegated to the head teacher and where for some visits final approval from governors 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 Visit Leader is appointed for each visit and has been approved by EVAS, where they are leading adventurous activities, (see section 15)
- The school has in place a suitable local Educational Visits Policy and procedures for their school which clarifies:
    - Whether final approval for all visits rests with the head teacher or whether certain visits require approval from the governing body.
    - Whether EVOLVE visits is used for all visit categories.
    - Assign a risk category (1-3) to all visits undertaken by the school using the criteria in section 12.
    - Their 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.
- 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 that 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 4 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.
- The mechanism for reviewing the adequacy of visit assessment and planning processes, visit and learning outcomes and 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.

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 arranged through EVAS, re-validated every three years.

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 **4 weeks** prior to the visit. Visit details will automatically be notified to EVAS.
- 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.
- Obtain approval from EVAS for each Visit Leader appointed to lead Adventurous Activities using EVOLVE (see section 15).
- 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 Advice 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 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.

11.4 Tailored training for Assistant/Visit Leaders can be arranged by contacting EVAS.

12 Visit categories

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

Category	Definition	Requirement for Notification, Validation & Approval
1	These are routine non-complex low risk visits. Examples include visits to libraries, theatres, museums etc They are covered by: • Generic Risk Assessment • School's local Educational Visits Policy & procedures, (including blanket approval by Head Teacher for these visits). • Blanket informed parent/carer consent	Blanket approval for visits in this category is normally provided by the Head Teacher in the school's Educational Visits Policy. Recommended that EVOLVE be used to record documents.
2	Visits which require enhanced planning, due to the presence of a specific risk/s. These visits include: • All residential visits not in Category 3. • All other non-residential visits not in categories 1 or 3 They require:	Must be approved by Head Teacher. EVOLVE must be used for all visits in category 2, to record documents and provide an auditable trail.

	• A risk specific assessment, including: • Visit specific informed parental consent. • School's local policy & procedures to be followed.	
3	Higher risk visits defined as: • Visits outside the UK • Visits which include adventure activities (see section 13). • Visits to remote or hazardous locations	**Head Teacher must authorise the visit in Evolve a minimum of 4 weeks before the visit. EVAS will receive automatic notification of the visit.** EVAS will validate/approve the arrangements once the assessment and planning processes have been scrutinised and any queries addressed.

12.2 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.

12.3 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.

12.4 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.

13 Adventurous Activities

13.1 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, canyonning

- 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.

13.2 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

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

14 Visit Approval Processes

14.1

- Approval for all visits in category 1 should be set out in the Schools Educational Visits Policy, and is normally a blanket approval process, also outlining staff authorised to lead such visits.
- Approval for visits in category 2 is given by the Head Teacher normally on an individual visit basis.
- Approval for category 3 visits is given by the Head Teacher/governing body (in accordance with the schools Educational Visits Policy) **following validation/approval from EVAS of the assessment & planning processes.** 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.
- EVCs will obtain approval from EVAS for each Visit Leader appointed to lead all category 3 visits using EVOLVE (see section 15)
- It is expected that the EVC or Head Teacher will seek further advice from EVAS when necessary.

14.2 Schools running Duke of Edinburgh's Award (DofE) expeditions must follow the approval processes and timescales outlined in 13.1 for the different categories of visit.

14.3 A copy of the Wild Country Notification (Green Form) should be included with the EVOLVE submission, where relevant to the DofE expedition.

14.4 Please note Visit Leaders for DofE expeditions considered to be adventurous (see section 12) are required to have approval from EVAS using Evolve.

15 Visit Leader Competence and Approval

15.1 Staff wishing to lead adventurous activities (see section 13) must have approval to do so from EVAS using EVOLVE. Approval will be based upon evidence of competence, which will include relevant qualifications, training and experience where relevant.

- For a specific visit, evidence of leader competence is required on the Activity Leader Form (ALF) prompted through EVOLVE
- If a leader wishes to apply for generic approval to lead a specific adventurous activity, they should complete a Leader Approval Request (LAR) in EVOLVE for endorsement by their Head Teacher who submits it through EVOLVE for approval from the EVAS. When approval has been received, it may be attached to future ALFs as evidence.

15.2 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 these roles and responsibilities before approving them to lead educational visits. Head Teachers should refer to the OEAP guidance documents (available from their website) on:

- Approval of Leaders
- Good Practice Basics

Which provide advice (including competency/qualifications matrix) to Head Teachers to assist in this decision.

15.3 Further advice is available from EVAS if there is doubt regarding the competence of a member of staff to lead an educational visit.

16 Minibus Driving

16.1 Eligibility to drive a minibus is set out in 'Guidance on Driving Minibuses' available from the Schools H&S website.

16.2 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.

16.3 Schools must ensure they comply with the guidance on Transport in Minibuses provided by the OEAP.

17 Emergency Planning & Critical Incidents

17.1 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.

17.2 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.

17.3 Please note EVAS don't 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 contact the Business Continuity Risk & Resilience Team on mobile: 07736372567.

18 Accident Recording, Investigation and Reporting

18.1 The Council's Accident recording and reporting procedure must be followed for all accidents on visits involving staff, pupils or volunteer helpers. All accidents will be screened by the EVAS and reported to the Health and Safety Executive where necessary.

18.2 Schools must undertake an investigation following any accident or critical incident. Accident report forms, and guidance on conducting an investigation are available from the Schools H&S Website, see link above.

18.3 EVAS must also be notified as soon as practical in cases where there has been a serious injury or fatality. Contact details are on the Schools H&S website.

19 Supervision

19.1 Guidance on supervision levels is provided by the OEAP in their documents:

- Ratios and Effective Supervision
- Group Management & Supervision

19.2 Supervision 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

20 Assessing Venues and Providers

20.1 Visit Leaders and EVCs must follow OEAP guidance on preliminary Visits and provider assurances.

20.2 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.

20.3 It is important to note that if a provider does not have the Learning Outside the Classroom Quality badge, then a Provider Form must be completed.

21 Monitoring

21.1 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, available through the EVOLVE system or schools equivalent system, undertaken on a sampled basis
- Direct observation of a visit in progress.

22 Reviewing Visits

22.1 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.

22.2 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.

23 Auditing

23.1 EVAS will undertake audits on a sampled basis of all records involved in the visit assessment, planning and approval process to confirm compliance with best practice, this policy and OEAP standards.

24 Insurance

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

24.2 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.

25 Further Advice & Information

25.1 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.

26 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