



Extend Learning
Academies Network

Educational Visits Policy

Version:	1.0	
Written by:	ELAN executive team	
Reviewed by:	ELAN Board	Date: 28/03/2023
Approved by:	Name: Rosemary Carr Signed by: Rosemary Carr Chair of the Board	Date: 28/03/2023
Adopted by Academies:	Banwell Primary School Bournville Primary School Locking Primary School Mead Vale Primary School Mendip Green Primary School Milton Park Primary School Oldmixon Primary School Walliscote Primary School Windwhistle Primary School	
Review:	Annually	
Next Review Due By:	March 2024	

Document Control

Document Information

	Information
Document Name	Educational Visits Policy
Document Author	Estates
Document Approval	ELAN Board
Document Status	Version 1.0
Publication Date	April 2023
Review Date	March 2024
Distribution	Website/General

Version Control

Version	Issue Date	Amended by	Comments
1.0	April 2023	Estates Lead	New trust policy

Contents

Statement of intent	5
1. Legal Framework.....	5
2. Definitions	6
3. Key roles and responsibilities.....	6
3.1 The Trust Board	6
3.2. The Outdoor Education Advisor (OEA)	7
3.3 The Headteacher	8
3.4 The Educational Visit Coordinator (EVC)	8
3.5 The designated visit leader	9
3.6 Staff.....	10
3.7 Pupils	10
3.8 The Local Governing Body.....	10
4. Educational Visit Advice	11
5. Training of Staff	11
6. Planning, Notification and Approval.....	11
Categories of Risk and Approval Hierarchy via EEC Ltd electronic system	12
Category A – Low Risk	13
Category B - Medium risk activities	13
Category C – Higher risk activities	13
Visit Planning	14
7. Risk Management	15
Emergency Planning and Critical Incident Support	17
8. Preliminary Visits and Provider Assurances	17
9. Inclusion	18
10. Transport (For ELAN schools operating minibuses).....	19
11. Transport Arrangements (All Schools)	19
12. Consent and Data Protection	20
Retention of Records	20
Records - In the event of an accident	21
13. Staff Competence and Requirement to Ensure Effective Supervision.....	21
14. Insurance and licensing.....	22

15. Accidents and incidents.....	23
16. Missing person procedure	23
17. Pupils with SEND	24
18. Financial Procedures, Charging for Activities and Visits, and Remissions	25
19. Trips Abroad.....	26
20. Reviewing Visits	27
21. Policy Review	27
22. Useful Information	28
Appendix 1 - Educational Visits - Responsibilities and Liabilities	29
Appendix 2 – Visit Proposal in Principle	30
Appendix 3 - Educational Visits: Categories of Risk.....	31
Appendix 3a - Visits Process Flowchart Categories 1 – 3	32
Appendix 4 - External Visits Coordinator Checklist	33
Appendix 5 – Emergency Action Plan – Visit Leader/Accompanying Staff.....	35
Appendix 6 – Educational Visits Consent Form	38
Appendix 7 - Ratios and First Aid Requirements.....	40
Appendix 8 – Financial Planning proforma.....	41
Appendix 9 - Educational Visit Evaluation Form.....	42
Appendix 10 – Overview Flowchart for ELAN Educational Visits	43

Statement of intent

The Extend Learning Academies Network (ELAN) believe that outdoor learning, off-site visits and learning outside the classroom are an integral part of the entitlement of every child to an effective and balanced curriculum. Appropriately planned visits are known to enhance learning and improve attainment and so form a key part of what makes ELAN a supportive and effective learning environment.

ELAN fully supports and encourages visits and activities that are appropriately assessed, planned, managed, and conducted.

ELAN takes the health and wellbeing of staff and pupils very seriously. This policy has been designed in line with DfE HSE guidance as well as the National Guidance from the Outdoor Education Advisors Panel (OEAP) and details the Trust's responsibilities for pupils and staff members while out on educational visits and school trips.

ELAN follows the guidance and procedures as set out by the DfE (2014) for Health and Safety Advice on Legal Duties and Powers which supplanted previous advice of Health and Safety: Responsibilities and Powers (2001) and Health and Safety of Pupils on Educational Visits (HASPEV 1998).

All staff should follow guidelines as outlined in the professional standards for teachers and code of conduct for support staff and special reference should be made to Safer Working Practice for Staff in Schools, as well as any current safeguarding guidance 'Keeping Children Safe in Education' and 'Working Together to Safeguard Children' as well as the school's own policy.

Following this guidance ensures consideration for the health and safety of all those involved and to maintain the educational quality of visits and sound financial planning.

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 (i.e., whether as part of the curriculum, during school time or outside the normal school day), and includes education visits, outings, visits to parks, libraries, museums, sporting fixtures, cultural recreational and exchange trips, outdoor adventurous activities, residential visits and field trips (this list is not exhaustive)

All ELAN schools will formally adopt and implement the ELAN Educational Visits Policy.

[\(Appendix 1 - Educational Visits – Overview of Responsibilities and Liabilities\)](#)

1. Legal Framework

This policy has due regard to all relevant legislation and statutory guidance including, but not limited to, the following:

- The Health and Safety at Work etc. Act 1974
- DfE (2018) 'Charging for school activities'
- DfE (2018) 'Health and safety on educational visits'
- HSE (2011) 'School trips and outdoor learning activities'
- DfE (2013) 'Driving school minibuses'

This policy operates in conjunction with the following ELAN/school policies:

- Complaints Procedures Policy
- Behaviour Policy
- Business Continuity Plan /Critical Incident Policy
- Health and Safety Policy
- Charging and Remissions Policy
- School Minibus Policy
- Equality, Equity, Diversity and Inclusion policies
- SEND
- Safeguarding and Child Protection

2. Definitions

‘In loco parentis’ means that the group leader of any school trip or educational visit has a duty of care over the pupils in place of a parent.

‘School trip’ means any sports fixture, educational visit, foreign exchange trip, away-day or residential holiday organised by the school which takes pupils and staff members off-site.

‘Residential’ means any school trip which includes an overnight stay.

Adventurous activities include, but are not limited to, the following:

- Trekking/horse riding
- Caving/river gorge walking/ scrambling
- Skiing/snowboarding including indoor and dry slopes
- Water sports including coasteering/coast scrambling/canoeing/sailing/rafting/paddle boarding/kayaking/snorkelling/water skiing
- Climbing/abseiling including man made walls indoor
- An overseas visit
- A residential or overnight stay, home or abroad
- Field work in coastal, river or upland venues
- Multi activities including those delivered by an outside provider
- Hill walking and mountaineering
- Open country activities, beyond 30 mins of nearest refuge and above 550m
- Camping/Kite surfing/Trampoline parks
- Any form of motor sport/ shooting archery including laser tag, paintball, and air soft/mountain biking

It is important to note that ‘adventurous activities’ require a different response both in terms of being scrutinised by the Outdoor Education Advisor (OEA), specific risk assessments and length of notice given prior to permission being granted.

3. Key roles and responsibilities

3.1 The Trust Board

The Trust Board are responsible for:

- Ensuring this policy is compliant with national legislation.
- The overall implementation of this policy.

- Ensuring that this policy, as written, does not discriminate on any grounds including, but not limited to ethnicity/national origin, culture, religion, gender, disability or sexual orientation.
- Ensuring educational trips and visits positively impact pupils' lives, teaching them new life skills and providing new experiences.
- Promoting good safeguarding practices to ensure the safety of pupils and staff when taking part in extracurricular trips and activities.

3.2. The Outdoor Education Advisor (OEA)

ELAN is aware that these activities can present a higher risk to children. To reduce this risk to a level that is acceptable the Trust will appoint the services of a competent and experienced OEA. This is currently provided by European Education Consultants Ltd (EEC Ltd) and aided by the Trust designated Competent Person package with Educating Safely LLP.

The OEA will have an overview of all adventurous activities, including residential trips and advise on appropriate risk assessment and safety measures to help staff assess and manage risk and support headteachers in their assessments of adventurous activities. The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer.

The key aim of the OEA is to provide:

- Support to schools.
- Approval for visits where approval may not have been delegated at school level.
- A focal point for schools to contact to give expertise on adventure activities, expeditions, visits generally and specifically overseas visits.

The OEA is able to provide risk assessment advice to schools and monitor the visits carried out by ELAN schools via the EEC Ltd system. However, it is for the Headteacher to ensure the competency and qualifications of school staff, group leaders and Educational Visits Coordinators (EVC).

Educating Safely LLP will, as part of their annual health and safety audit process check that the school has a trained EVC.

ELAN understands that, as an employer it carries full legal responsibility. Choosing not to appoint a competent adviser leaves the Trust in a vulnerable position. In the event of any proven civil negligence, this can result in the payment of heavy damages. The effectiveness of the OEA is at the heart of an employer's ability to carry out their responsibilities.

Headteachers and EVCs will continue to approve all activities including those deemed adventurous, residential, or overseas. The approval of these visits remains with the headteacher, but the OEA will review these via EEC Ltd and add guidance on all visits forms that have any elements of these. It is then the responsibility of the school to follow the guidance and advice. The Headteacher will also make the Local Governing Body aware of the trips and visits that have been approved, via the 'Specific School matters' reports at their meetings.

To facilitate this process all schools will record all trips and visits via EEC Ltd. Headteachers, and EVCs will have access to this electronic recording system as well as the external OEA.

3.3 The Headteacher

The Headteacher is responsible for:

- Appointing an EVC. **In the absence of an EVC the headteacher should undertake their duties.**
- The day-to-day implementation and management of this policy.
- This may be delegated to EVC.
- Liaising with the EVC and communicating information regarding any planned trips to parents.
- Liaising with the ELAN, where appropriate regarding the organisation of extracurricular trips and activities, including settling any disputes.
- Being part of the approval process for extra-curricular trips and activities where appropriate. This may be delegated to the EVC.
- Ensuring the EVC is competent to oversee the coordination of off-site education and has undertaken the training as recommended by the OEAP. This training must be refreshed every three years.
- Ensuring, along with the EVC, that the relevant paperwork, using the EEC Ltd system, including risk assessments, for extracurricular trips and activities are completed.
- Ensuring suitable safety measures are in place prior to each trip or activity.
- Overseeing the work of the EVC, ensuring a whole-school approach is adopted when planning and coordinating extracurricular trips and activities.
- Ensuring there are contingency plans in place in the event of a member of staff being absent on the day of the trip or activity.
- Ensuring that there is a plan in place that is shared and reviewed to manage a critical incident or emergency.
- Ensuring that the ELAN Finance team/Local Governing Body is made aware of the trips and visits taking place.

The overall responsibility for all visits rests with the Headteacher at each school.

See Outdoor Education Adviser's Panel National Guidance for the role of the Head Teacher: <http://oeapng.info/head-manager/>

3.4 The Educational Visit Coordinator (EVC)

The EVC has overall responsibility for:

- Overseeing all issues and controls regarding extracurricular activities and trips.
- Liaising between all appropriate parties, including the Outdoor Education Adviser (OEA), Headteacher, HR, SENCO and finance during the planning and organising of extracurricular activities and trips.
- Working with the appointed OEA to help staff assess and manage risks.
- Ensuring the systems and procedures for dealing with educational visits adhere to the requirements of this policy.

- Ensuring risk assessments are conducted prior to school trips and educational visits to ensure pupils and staff safety.
- Ensuring an itinerary is created prior to an educational visit or school trip and ensuring it is distributed to parents and staff to ensure the event is well organised and safe.
- Liaising with the designated member of staff who will act as leader of the trip.
- Ensuring that any problems are reported to the schools Headteacher.

There should be at least one nominated senior member of staff to act in the capacity of EVC, who will support and challenge colleagues over visits and learning outside the classroom. They are the first point of call for advice on visit related matters. The EVC will check final visit plans before submitting them to the Head Teacher.

See Outdoor Education Adviser's Panel National Guidance for the role of the EVC:
<http://oeapng.info/evc/>

3.5 The designated visit leader

The designated visit leader in charge of the trip is 'in loco parentis' and has a duty of care to all pupils on the trip. The Visit Leader is approved by the Headteacher in conjunction with the EVC and will have overall responsibility for the planning and supervision of the visit. They must have received the appropriate training and be sufficiently experienced and competent to run a visit to which they have been assigned. They are also responsible for:

- Liaising with the EVC to ensure the schedule is free on the school calendar prior to planning an educational visit.
- Identifying the educational /enrichment purpose of the extra-curricular trip or activity and presenting its benefits to the Headteacher/EVC.
- Completing all essential documentation using EEC Ltd for the trip, including a risk assessment, with the Headteacher and EVC as well as any financial documentation.
- Ensuring parents are informed of the proposed extracurricular trip or activity well in advance of the trip. However, we understand that as some opportunities arise at short notice, this may not always be possible.
- Ensuring parental permission has been obtained prior to the trip. This may be through blanket consent.
- Understanding and operating safeguarding measures throughout the planning, organisation and delivery of the extracurricular trip or activity.
- Delegating responsibilities to other staff members on the school trip.
- Ensuring all adults on the trip are aware of their responsibilities and that the necessary checks have been carried out on volunteers in line with the Safeguarding Policy.
- Ensuring all adults on the trip are aware of the plans, including the Critical Incident Plan.
- Appointing a deputy leader who would be able to take control of the trip if the leader was unwell or unable to continue as leader.
- Liaising with SEND and HR in respect of any additional needs of either students or staff that might require additional resources or planning during the trip.

See Outdoor Education Adviser's Panel National Guidance for the role and responsibilities of the Visit Leader - <http://oeapng.info/visit-leader/>

3.6 Staff

Staff assisting the visit are responsible for:

- Adhering to this policy and applying its principles when participating in extracurricular trips and activities.
- Ensuring the safety of the pupils is maximised throughout any educational visit or activity.
- Liaising with the designated visit leader to understand personal responsibilities and ensuring the smooth running of the school trip or activity.
- Ensuring that they are fully aware of any pupils requiring additional support.
- Ensuring that they are fully aware of the trip arrangements and requirements to ensure they are prepared in terms of equipment and knowledge of the planned itinerary.
- Ensuring that any space visited, e.g., a park and playing field, or coach is kept clean and free from litter during the trip.

3.7 Pupils

Pupils are responsible for:

- Following instructions from staff while on school trips and adhering to the Code of Conduct for the trip and the school's Behavioural Policy.
- Ensuring that they have the necessary equipment or clothing as detailed by the trip leader to remain safe throughout the experience.
- Keeping pride in their presentation, understanding that they are representing the school whilst on an education trip.
- Ensuring that, during visits to outdoor spaces, they keep the area tidy and free from litter. This also applies to any vehicles used.
- Behaving in a manner which matches the ethos of the school, and for following the behaviour rules set out in the school's Behavioural Policy.

3.8 The Local Governing Body

The Local Governing Body will act as a 'critical friend', to ensure that the Headteacher and EVC adhere to statutory requirements and good practice.

- To define which type of visits should be approved by the Local Governing Body within Category B.
- To agree visits deemed to be higher risk (Category C) such as residential visits, visits overseas and visits involving outdoor adventurous activity.
- To ensure that all aspects of risk management have been considered.
- To ask questions regarding educational objectives and how they will be met.
To review policy and procedures as agreed.

See Outdoor Education Adviser's Panel National Guidance for the role of the governing body: <http://oeapng.info/governors/>

4. Educational Visit Advice

It is advisable that the visits and activities, listed below, are checked by EEC Ltd and/or Educating Safely before the activity takes place

- overnight stays
- foreign travel
- adventurous activities

ELAN obtains advice/support relating to Educational Visits from the H&S professionals at Educating Safely.

The following visits will not fall under the remit of Educating Safely:

- Visits where schools choose to directly lead and deliver adventurous activities i.e., school staff member leading a climbing activity, kayaking, skiing etc.
- ELAN require all adventurous activities to be delivered by a LOtC/AALS (Adventure Activity Licensing Authority) badge/licence holder unless specific permission to deviate from this has been given by the ELAN Chief Executive Officer.

5. Training of Staff

Schools will provide staff supporting or leading a school trip training in line with this policy.

Trip leaders should ensure that all staff are fully briefed on their personal responsibilities during the trip.

Staff, where appropriate, will receive regular and ongoing training as part of their CPD.

6. Planning, Notification and Approval

Any planned trip or offsite activity proposal must be agreed in principle by the Headteacher (and Local Governing Body for Categories B (if applicable) and C).

Prior to the visit being agreed in principle, the ELAN finance team must be notified of the planned trip and provided with details before any funds are collected, fees paid, or notifications made to parents. A 'Trips Code' will only be issued at this point in the planning process.

Prior to planning a school trip, the following guidance will be read by the organisers:

- DfE (2018) 'Health and safety on educational visits'
- HSE (2011) 'School trips and outdoor learning activities'

A thorough risk assessment will be conducted by the designated trip leader during the planning of the trip, to ensure pupil and staff safety.

When partaking in adventure trips, activities will always be identified at the planning stage and never added during the trip. When planning water sport activities, the need for instructors and lifeguards will be taken into account, particularly when using facilities which may not have a trained lifeguard present.

The school will do everything in its power to ensure that all pupils are given an opportunity to participate in school trips, for example, organising two trips with a smaller group size or finding a venue which can cater for all pupils. Where there is a maximum capacity of pupils for a trip, places will be allocated on a first come, first served basis. This will be clearly communicated to parents.

When planning an educational trip or activity, the Local Governing Body will ensure the trip does not discriminate against a particular individual, group of pupils or single school. Each school will have an equal opportunity to participate in a pre-planned trip or activity. Any disputes relating to pre-planned educational trips or activities will be discussed and resolved at local governing level.

The EVC/Headteacher/Senior Leadership Team and Local Governing Body shall consider and approve educational visits. The appointed Education Visits advisor (EEC Ltd) will also check and acknowledge arrangements for visits which are deemed more complex or 'higher risk'.

Visit leaders should seek initial approval by completing the 'Visit Proposal in Principle' and 'the Financial Planning' forms. This should be forwarded to the EVC. Depending upon the nature of the visit the School Leadership Team/Governors may wish to look at and approve prior to the visit leader entering visit details onto the EEC Ltd system.

For residential and overseas visits approval and planning should normally have been undertaken several months prior to the visit.

[\(See appendix 2 – Visit Proposal in Principle Authorisation form\)](#)

Once approval in principle has been given the visit leader must then enter visit detail on EEC Ltd and upload other required detail – numbers/medical details/emergency contacts/risk assessments/itinerary's etc.

Categories of Risk and Approval Hierarchy via EEC Ltd electronic system

EEC Ltd has an online portal for planning and managing educational trips. ELAN has implemented this system for the management and approval of all school trips.

EEC Ltd must be used to document and manage all category B and C trips (see categories below), and for the appropriate approval stages to be actioned.

EEC Ltd should already be populated within your school and staff user names and passwords shared. Contact your EVC if you cannot access EEC Ltd and are leading a trip.

There are some additional forms and risk assessment templates, which will assist in the management of school trips which sit outside of EEC Ltd portal. For example, an initial trip proposal form will need to be completed and authorised ahead of a trip being organised, parental consent form etc.

The Headteacher will have an overview of all educational visits applicable to their school.

Category A – Low Risk

Simple low risk ‘everyday’ activity (usually within the school day but including after school sports fixtures) that are part of the curriculum and take place during the school day do not require consent. Visit details should be completed submitted to the EVC normally no later than **4 weeks** prior to the visit. These visits will be checked / approved by the EVC. Examples include walking in parks or field studies in environments presenting no technical hazards, or after school sport fixtures. They should be supervised by a teacher who has been assessed as competent by the Head Teacher or Educational Visit Co-ordinator, where appropriate, to lead the activity.

It is not necessary to record all Category A trips on EEC Ltd due to their non-hazardous curricular activity. However, there are some that may require series approval or blanket consent via EEC Ltd. Information must be provided to parents in advance, and they will have the opportunity to withdraw their child.

Schools will formally log those visits not covered by blanket consent.

Category B - Medium risk activities

Visit details should be completed on the system and paperwork should be uploaded and submitted to the EVC (normally no later than **6 weeks** prior to the visit). These visits will normally be checked / approved by the EVC / Headteacher and as appropriate by the appointed Outdoor Education Adviser (EEC Ltd). The schools Local Governing Body, might, in liaison with the Headteacher decide that some Category B trips are to be approved by the Local Governing Body.

This might include day visits within the UK excluding adventurous activities, and Visit Leaders are to gain outline permission in the first instance for the visit from the Headteacher.

Safe supervision requires that the Group Leader should as a minimum, have undergone familiarisation specific to the activity and / or the location. The Group Leader will have to be approved as suitably competent by the Headteacher and hold any necessary qualification/award. Examples include walking in non-remote country, camping or cycling on roads.

Category C – Higher risk activities

This is the most demanding category. It includes all those activities that if not school-led, would be in the scope of the Adventure Activities Licensing Regulations 1996. Visit details should be completed on the system and paperwork should be uploaded and submitted to the EVC (normally no later than **6 weeks** prior to the visit, but ideally 6-8 weeks, 12 – 26 weeks prior to UK residential, and 40 weeks prior to an overseas visit). These visits will be checked / approved by the EVC / Headteacher / Outdoor Education Adviser (EEC Ltd). **The Local Governing Body will approve all higher risk visits.**

In the case of sports, where safe supervision requires the leader to complete some prior test of his/her specific competence, such testing might include a recognised course of training, the recorded accumulation of relevant experience or an assessment of competence by an appropriate body.

For all residential visits, adventurous activities or visits involving foreign travel. Visit Leaders are to gain outline permission for visit from Headteacher. Once outline approval has been given, the visit will then be scrutinised by EEC Ltd to ensure the visit complies with the OEAPNG after which final approval will be given by the Headteacher.

For visits involving adventurous activities: Visit Leaders must check if an activity provider holds either an AALA licence (http://www.aals.org.uk/aals/provider_search.php) or, a LOtC quality badge (<http://www.lotcqualitybadge.org.uk/search>). If not the Visit Leader must send the OEAP National Guidance document 8q provider questionnaire) (<http://oeapng.info/downloads/model-forms-mind-maps-and-checklists/>). Returned questionnaires must be scrutinised by visit leaders.

For visits involving travel abroad: Visit Leaders are required to complete detailed planning well in advance and the EVC must be kept up to date with progress. Checks must be made on any third-party providers and permission from the Head Teacher to use them be obtained before any deposits are paid. Third party providers who hold the LOtC quality badge do not require further checks. Those who do not hold this accreditation should complete and return a provider statement: <http://oeapng.info/downloads/model-forms-mind-maps-and-checklists/> Returned questionnaires must be scrutinised by Visit Leaders.

Note: Within the trips module of EEC Ltd, there is a help facility (top RHS of screen), when selected, it will open a “screen shot training presentation” on how to complete a trip form.

(Appendix 3 - Categories of Risk – Educational Visits)

(Appendix 3a – Visits Process Flowchart Category 1-3)

Visit Planning

Visit planning includes consideration of the question: ‘What are the really important things that we need to do to keep us safe?’ It should focus on those issues that are individual to the specific event, taking into account the needs of the group (including special and medical needs), the experience and competency of the visit staff team, and the leader in the context of the event. Significant issues must be recorded; and shared with all relevant parties.

Planning should reflect the consideration of legal and good practice requirements ensuring: -

- The plan is based on the school’s procedures and employer guidance
- Proportionate assurances have been obtained from any providers (making full use of national schemes which accredit that assurances have already been obtained by credible inspection regimes)
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained. Looked after children may need permission from Children’s Services, please liaise with relevant pastoral staff
- All staff (including any adult volunteer helpers) and the learners involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process
- All visits involving residential, overseas activity or outdoor adventurous activity must be given to the EVC within the timescales, to then go to the Headteacher/Governors for approval and to be passed on to EEC Ltd.

It is recommended at an early stage of the planning process that the provisional staffing team meet to identify the benefits and learning outcomes that the activity (or range of activities). If the outcomes are to be evaluated with any rigour, then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and also be a vital part of the risk management process in providing some objectivity in a “Risk Benefit Analysis”.

Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies.

The degree of complexity of a particular plan (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as “STAGED” as explained below. It is good practice to involve participants in the planning and organisation of visits, as in doing so they will make more informed decisions and will become more ‘risk aware’ and hence at less risk.

- **Staffing requirements** – Trained? Experienced? Competent? Ratios?
- **Timing** – When? For how long?
- **Activity characteristics** – Specialist? Insurance issues? Licensable?
- **Group characteristics** – Prior experience? Ability? Behaviour? Special and medical needs?
- **Environmental conditions** – Like last time? Impact of weather? Water levels?
- **Distance from support mechanisms in place at the home base** – Transport? Residential?

(Appendix 4 – EVC Checklist)

7. Risk Management

As an employer, ELAN have a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level. Suitable and sufficient risk management systems are in place.

ELAN adopts a ‘Risk-Benefit Assessment’ approach for educational visits, whereby the starting point for risk planning is consideration of the benefits and learning outcomes. This appreciation of the benefits to be gained, through participation, provides some objectivity to a decision that any residual risk (i.e., the risks remaining after control measures have been put in place) is “acceptable”. The Health and Safety Executive endorse this approach through their “Principles of Sensible Risk Management” and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

The ELAN takes a common sense and proportionate approach, remembering that in schools risk assessment and risk management processes are tools to enable learners to undertake activities safely, and not prevent activities from taking place. Sensible risk management cannot remove risk altogether.

Schools ensure that exemplar generic risk assessments are available. Staff should review and adapt these generic risk assessments for medium and higher risk activities to ensure that they are appropriate to specific events and activities.

Staff are not required to complete a risk assessment for low-risk simple everyday activities which forms part of the normal school day, for example, taking pupils to a local venue which is frequently visited, such as a swimming pool, local sports fixtures, parkland, or place of worship. The visit leader and support staff must however be familiar with the contents of the generic risk assessment for simple low risk everyday activity and aware of emergency procedures. This follows the recommendations within OEAP National Guidance.

In these circumstances the visit leader and accompanying staff should focus on completing risk assessments for the areas of their own responsibilities not covered by the providers risk assessment for the management for medium and higher risk activities. This will usually be travel to and from the location, pastoral, and welfare issues, how any 'down-time' will be safeguarded and contact arrangements for the emergency 'base' contact person.

Individual risk assessments/plans may be required for learners with differing or special needs.

- All risk assessments should be agreed with the EVC
- Risk assessments should be shared with accompanying staff and with learners as appropriate. This includes contingency plans.
- Visit leaders remain in charge throughout the visit. Duty of Care cannot be delegated to 3rd parties.
- Leaders should challenge provider staff if they feel that an activity is too hazardous, not delivered at an appropriate level etc. Actions may include amending the activity or ceasing it.
- Generic Risk Assessments are available via the EVC.

There is a legal requirement for the risk assessment process to be recorded and for suitable and sufficient control measures to be identified for any significant risks. There is no legal requirement to produce this risk assessment record in a particular format but schools and visit leaders should use the format that has been identified in the ELAN risk assessment procedure (available on the EEC Ltd portal) and follow the Health and Safety Executives guidance on risk assessment: <http://www.hse.gov.uk/pubns/indg163.htm>

See National Guidance on good practice for risk management <http://oeapng.info/downloads/good-practice/>

A risk assessment will be conducted for each school trip before it is undertaken to identify hazards and control measures specific to the trip.

The process is as follows:

- **Identify the hazards**
- **Decide who might be harmed and how**
- **Evaluate the risks and decide on precautions**
- **Record findings and implement them**
- **Review assessment and update if necessary**

The individual carrying out the risk assessment process will have the skills, status and competence needed for the role, understand the risks involved, and be familiar with the activity.

Emergency Planning and Critical Incident Support

A critical incident is an incident where any member of the group undertaking an offsite activity:

- Has suffered a life-threatening injury or fatality or is at serious risk
- Has gone missing for a significant and unacceptable period
- Is any incident that is beyond the normal coping mechanisms of the Visit Leadership Team

Schools must provide emergency planning procedures to support staff in the event of a critical incident during trips or offsite visits. It is recommended that the following procedures should be formalised by each school, and persons of responsibility identified together with contact details:

During the normal school day

To activate support, the visit leader should immediately contact the school reception as the first point of contact. The EVC /Headteacher/SLT should be informed.

Beyond the school day

The out of hours Emergency 'Base' contact number(s) should be used. The Headteacher /SLT will be informed.

A member of the Senior Leadership Team should always be available as an Emergency 'Base' contact whilst groups are away from site.

(See Appendix 5 – Emergency Action Plan)

8. Preliminary Visits and Provider Assurances

ELAN requires that all visits are thoroughly researched to establish the suitability of the venue and to check that facilities and third-party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people, it is a vital dimension of risk management.

It is good management practice to carry out a preliminary visit. The following identifies the circumstances where preliminary visit is a requirement.

- Pre visit required for visits where there is a high complexity factor, and the visit has not happened previously
- Additionally required when visit is solely led by the school
- Residential visits, visits abroad, exchange visits, adventure led by the school, staff all have aspects of complexity.

If the visit is led and managed by the provider, then a variety of approaches can reduce the need to pre visit.

Visit Leaders can take full advantage of the nationally accredited provider assurance schemes that are now available and assists to reduce bureaucracy – examples include: -

- The LOTC Quality Badge
- AALS licensing
- Adventuremark

ELAN takes the view that where providers hold one of the above accreditations, there should be no need to seek further assurances.

The OEAP National Guidance 4.4f – Assessing an adventure activity provider check list, 4.4h – using external providers and facilities and 8.1q – Provider Questionnaire - <http://oeapng.info/downloads/all-documents/> should be followed when undertaking pre visits and assessing providers.

When considering external providers for activities, the EVC will check whether they hold the 'Learning Outside the Classroom Quality Badge' to indicate they meet nationally recognised standards.

If a provider does not hold the badge, the EVC will check the following to ensure they are a suitable organisation to work with:

- Their insurance arrangements
- Their adherence to legal requirements
- Their control measures
- Their use of vehicles
- Staff competency levels
- Safeguarding policies
- The suitability of their accommodation
- Any sub-contracting arrangements in place
- The presence of necessary licences

If it is deemed appropriate to engage with an external provider, a written agreement will be created outlining what each party is responsible for. If an organisation does not meet the school's standards, they will not be considered.

9. Inclusion

ELAN schools will promote values of equality and not discriminate against any individual or group of pupils when organising a trip. The extra-curricular trips and activities offered to pupils will provide new experiences and develop life skills.

Every effort should be made by the school to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender, or religion. If a visit needs to cater for learners with special needs, every reasonable effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Schools will take all reasonably practicable measures to include all learners. The principles of inclusion will be promoted and addressed for all visits and reflect school policy, thus ensuring an aspiration towards: -

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

Under the Equality Act 2010, it is unlawful to: -

- Treat a young person to whom one of the protected characteristics applies less favourably
- Fail to take reasonable steps to ensure that such persons are not placed at a substantial disadvantage without justification.

Due to the popularity of some extra-curricular trips and activities, the school will offer places on a first come, first served basis. Any individual, staff or otherwise, shown to be taking preference over one pupil or a group of pupils will be subject to formal disciplinary action.

Where possible, pupils will be given the opportunity to contribute to the planning and organisation of extra-curricular trips and activities.

For school trips that require additional payment, the fee will be reasonable, and help will be provided where possible for pupils who cannot afford the initial fee.

10. Transport (For ELAN schools operating minibuses)

For ELAN schools that maintain a school minibus, the school is responsible for arranging the annual maintenance of the minibuses, including MOTs and road tax. The use of minibuses will be organised in accordance with the school's minibus policy.

The driver will have a current driving licence, be aged 25 years or over and hold a full licence in at least a category D PCV in order to drive on a domestic school trip. Category B PCVs may be acceptable in certain circumstances, as outlined in the Minibus Policy. If driving abroad, the EVC will contact ELAN Central Team for guidance on which licence is required. Drivers will complete the relevant form from the school office and supply a photocopy of their driving licence.

If passengers are paying a charge, the minibus permit must be clearly displayed in the vehicle. Internal damage to the minibus is the responsibility of the individual or organisation using the minibus. The school will decide who is responsible for covering the cost of any repairs. The minibus will carry strictly one person per seat and seatbelts must be worn at all times. Fines incurred will be paid by whoever was driving the minibus at the time the offence was committed.

Start and finish mileage, along with any potential risks, defects or damage identified, will be reported upon return to the school. The school will identify staff members that hold the required licence and have completed specific training which allows them to drive the school minibus.

11. Transport Arrangements (All Schools)

All schools must follow the National Guidance on Transport for school trips see: https://oeapng.info/search-results/?download_search=transport

4.5a Transport General Considerations

4.5b Transport in Minibuses

4.5c Transport in private cars

4.5d Seat belts and Child restraints

4.5f Checklist – Assessing a Coach Hire Provider

12. Consent and Data Protection

Employers and employees need to take account of the legalities regarding a requirement for formal consent (parental permission).

Low risk simple everyday activity – Category A

Parents should complete, sign and return an annual ‘blanket’ consent form for visits at the start of the academic year that gives permission for simple low risk everyday activities to be undertaken within the normal curriculum day, music and local sports fixtures after school. No additional consent will usually be sought. It is still a requirement to inform parents that their son/daughter will be undertaking an off-site visit. This will allow parents the opportunity to withdraw their child if they wish to do so. It is the parent’s responsibility to notify the school of any changes to their child’s health/medical conditions and medicines.

Medium and Higher risk activity – Category B/C

Specific consent should be sought. It is important that sufficient detail is provided about intended arrangements as to allow informed consent to be given. Parents should provide emergency contact details, medical and dietary information. The visit leader, accompanying staff and emergency contacts should have access to these during the visit.

Parental consent is not generally required for off-site activities that take place during school hours.

See the National Guidance document 4.3d on consent <http://oeapng.info/downloads/all-documents/>. It is advisable that all parents/guardians are advised of educational trips and permission obtained for visits which take place off the school site.

(See Appendix 6 – Educational Visit Consent Form)

Retention of Records

There are no legal requirements to retain information after a visit (OEAP NG). However, it is useful to retain information:

- To record the range of opportunities that each school provides for learners
- To record staff experience in leading visits and outdoor learning (competence based on number/range of visits leading or supporting)
- To demonstrate effective planning and evaluation of visits and outdoor learning - as a future planning tool

Any records containing personal information must be stored securely and kept in compliance with data protection requirements. For example, unless the guidance on accidents applies, specific parental consent forms need only be retained until the visit (or period of time) covered by the consent has ended and then they may be destroyed.

Records - In the event of an accident

Whenever there has been an accident or incident ELAN will consider whether the nature of any accident or incident might, in the future, give rise to an insurance claim or a civil claim for damages. Where this is considered to be a possibility, or where an incident was reported to HSE under the Reporting of Injuries, Diseases and Dangerous Occurrence Regulations (RIDDOR), sufficient information regarding the visit and incident will be retained to allow a school to investigate fully and, if necessary, defend the actions:

- Full details of the incident and any related report/witness statements/follow-up actions
- The plan for the visit (including risk management plan)
- Names of the pupils and adults on the visit
- The programme of activities that took place on the visit
- A copy of the information about the visit sent to parents prior to the visit
- A copy of the completed parent consent form(s) for anyone directly involved in the accident/incident

This information will be stored. Due to the time limits on civil claims for negligence, such records should be kept until the learner reaches age 21, or for 3 years following the incident in the case of an adult.

13. Staff Competence and Requirement to Ensure Effective Supervision

ELAN recognises that staff competency is the single most important aspect of safe visit management and schools will encourage staff in developing this competence in the following ways:

- A mentoring system, where staff new to visits assist and work alongside experienced trip leaders before taking on a leadership role.
- Supervision by senior staff of some educational visits.
- Support for staff to attend training courses relevant to the role of visit leader.

In deciding whether any member of staff is competent to be a Visit Leader the Head Teacher will take into account the following factors:

- Level of relevant experience
- Any relevant training undertaken
- The emotional and leadership ability of any prospective visit leader to make dynamic risk management judgements and take charge of any emergencies that may arise.
- Knowledge of the pupils, the venue, and the activities to be undertaken.

Health and Safety laws do not prescribe activity specific staffing ratios, but it does require that the level of supervision and group management is 'effective'.

Each School will assess/determine effective supervision by proper consideration of:

- Staff competence
- Activity – nature and location of the activity (including the type of activity, duration, skill levels involved)
- Group – age (including the development age) of the group, ability of the group (including special learning needs, behaviour, medical and vulnerability characteristics etc.)
- Environment – nature and location of the activity including the type of the activity, duration, skill levels involved, as well as the time of year and prevailing conditions
- Distance away from base.

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

The Visit Leader should follow OEAP National Guidance 4.3b Ratio and effective supervision: <http://oeapng.info/downloads/download-info/4-3b-ratios-and-effective-supervision/> and 4.3c Risk Management <http://oeapng.info/downloads/download-info/4-3c-risk-management/>

(Appendix 7 – Ratios and First Aid Requirements)

Where the pupil(s) of another school within the trust are considered for a trip with the organising school. The organising school will remain the organising body.

The ELAN supports the role of Volunteers and Parents in school trips at the discretion of the Headteacher.

The criteria for selection of volunteers or parents are entirely at the Headteachers discretion, to support the visit leader to organise the trip and supporting adults in a way that will maximise the safety, enjoyment, and the learning experience for everyone. The criteria in selecting parents invited to support a school/class visit should be based on:

- The needs of the children
- The circumstances of the visit
- The specific needs of particular children
- Whether parents have the skill set and experience to the success of the visit. For example, they must be physically able to participate in all aspects of the visit.
- Whether volunteers are able to contribute positively to the visit for the benefit of all the children.

Volunteers or parents accompanying a visit will attend a pre visit briefing by the visit lead and be clear about their roles and responsibilities during the visit.

Volunteers or parents will not be left in sole charge of a pupil(s) except where it has been agreed as part of the risk assessment, and DBS procedures have been satisfactorily completed.

14. Insurance and licensing

Insurance cover for approved educational visits is provided by the Trust's insurance provider (public liability) insurance policy. However, some adventurous activities might not be specially

covered confirmation/checks should be made with the insurance provider before the visit takes place. See National Guidance 4.4c Insurance <http://oeapng.info/downloads/all-documents/>

When planning activities of an adventurous nature in the UK, the EVC will check that the provider of the activity holds a current licence. Insurance will be organised for every trip, no matter how short, to ensure adequate protection and medical cover is in place. Parents will be informed of the limits of any insurance cover.

15. Accidents and incidents

In the case of accidents and injuries while on a school trip in the UK, the school's accident reporting process will begin, as detailed in the Health and Safety Policy. In the case of accidents and injuries while on a school trip abroad:

- Organisers will cooperate fully with local emergency services and understand that any injury or death of a member of staff or pupil outside of the UK may be subject to the law of the land where the accident occurred.
- The first point of contact within the UK will be the Headteacher who will contact the family of the injured person.
- Pupils will be asked not to contact friends or parents in the UK until the family of the injured person can be contacted.
- The British Embassy/Consulate will be informed.
- The insurer will be notified.

The Headteacher will keep written records of any incidents, accidents and near misses. Media enquiries will be referred to the Headteacher or, if they are not available, the deputy Headteacher or the clerk to governors.

Staff will use guidance as set out in the school's Business Continuity Plan, in particular the 'initial response' section, to ensure the safety of pupils and staff should anything happen, e.g. a terrorist attack. Staff will be briefed on how to react and respond should an emergency situation occur. Relevant risk assessments will be undertaken before the trip, including for points of interests such as museums and hotels. Pupils and staff are informed of an evacuation plan before entering trip venues; this should include an agreed rendezvous point, to ensure everyone knows what to do in an emergency.

16. Missing person procedure

The school will place pupil and staff safety as its top priority when participating in school trips, either domestically or abroad.

Before embarking on the trip, extensive risk assessments are undertaken in accordance with this policy. The EVC will communicate with the venues of the school trips to ensure the correct group sizes are planned for each setting.

When travelling with a pupil with SEND, the EVC will ensure an adult is with them at all times and that the visit is adequately modified to suit the pupil's needs in accordance with this policy.

Everyone on the trip will be provided with a contact sheet for all members of staff, in the event they are unable to locate their group. All staff members will be required to carry mobile phones with them at all times.

Upon arriving at every venue, the designated trip leader will identify a rendezvous point where pupils and adults should go if they become separated from the rest of the group. Pupils and staff will wear school branded clothing, in order to make them easily identifiable.

Regular head counts of all pupils and staff will take place throughout the day to ensure all persons are present at all times.

In the event someone goes missing whilst on a school trip domestically or abroad:

- The designated trip leader will ensure the safety of the remaining pupils and staff by taking a register to identify who is missing.
- The designated trip leader will immediately identify at least **one** adult to start looking for the person and another adult to contact them via phone, these people will look for the person until, where necessary, the police arrive.
- Where possible, the venue will be notified of the missing person to help ensure the person is found quickly.
- If the person cannot be contacted or located within **10 minutes**, the local police, or relevant authorities, e.g., the British Embassy, will be contacted.
- If the police are called, the trip leader will contact the Headteacher, or other available person, back at the school and inform them of what has happened.

If the police, or another authority, is called to an incident where someone is missing, they will oversee locating the person and will advise on factors including, but not limited to, when to contact next of kin.

If the missing person cannot be found, the group will return to school. If this is not possible, e.g., when a trip is taking place abroad, the EVC will make arrangements to ensure the group's safety, e.g., by changing venues or cancelling visits.

If a member of the party has gone missing and is subsequently found, the trip leader will:

- Review the group sizes and staffing ratios to ensure no one becomes separated from their group.
- Review whether more registers should be conducted throughout the day.
- Assess which venues they attend to ensure they are suitable for the group.
- Make recommendations to the EVC to ensure similar incidents can be avoided in the future.

17. Pupils with SEND

Where possible, activities and visits will be adapted to enable pupils with SEND to take part. The SENCO will liaise with pupil's parents, where appropriate, to consider what reasonable adjustments may be necessary.

Where this is not possible, an alternative activity of equal educational value will be arranged for all pupils. Pupils with SEND will be accompanied by a responsible adult during the extra-curricular trip or visit.

18. Financial Procedures, Charging for Activities and Visits, and Remissions

The financial procedures outlined in the ELAN Charging and Remissions Policy will always be followed when arranging trips.

All visits require a financial plan to be completed and handed to the EVC before any authorisation of a visit can be made.

The school will act in accordance with the DfE's guidance document 'Charging for school activities' (2018) and, therefore, will only charge for trips which are classed as an 'optional extra'. This is education provided outside of school time which is not:

- Part of the national curriculum.
- Part of a syllabus for an examination that the pupil is being prepared for at the school.
- Part of religious education.

The schools of the ELAN Trust may invite, but not require, parents to make voluntary contributions for activities in order to enhance what is otherwise provided. There is no obligation to contribute, and pupils will not be treated any differently according to whether or not their parents have contributed.

The level of contribution will be calculated for each activity and may include, for example, an element to cover the participation of pupils from low-income families or the cost of travel for accompanying teachers. Some activities may not take place if parents are reluctant to support it.

The ELAN Trust schools will comply with the law in relation to charges that may be made for the cost of activities provided outside school hours, within school hours and for board and lodging on residential courses.

Money for school trips will always be paid directly to the school via Parent Pay. Under no circumstances should school trip money be processed through personal accounts.

Letters to parents notifying of a trip must not be sent until financial arrangements have been agreed with ELAN Finance.

(See [Appendix 8: Financial Planning proforma](#). Excel template available from Central Finance or can be located on the [Staff Portal](#))

All letters to parents regarding school trips **will include a clause explaining what will happen in the event that the trip is cancelled, or a pupil cancels their place on the trip.**

In accordance with the ELAN Charging and Remissions Policy, the ELAN board will leave to the discretion of the headteacher the decision as to what proportion of the cost of activities should be charged to public or non-public funds and when to request voluntary contributions.

Remissions for residential visits, in accordance with the ELAN Policy, the school will give consideration to parents and carers who can prove they are in receipt of the following benefits and where appropriate assistance may be given towards the cost of board and lodging for residential visits:

- Income Support
- Income Based Jobseekers Allowance
- Income related Employment and Support Allowance
- Support under part VI of the Immigration and Asylum Act 1999
- The guaranteed element of State Pension Credit
- Child Tax Credit, provided that Working Tax Credit is not also received, and the family's annual income (as assessed by His Majesty's Revenue and Customs) does not exceed the current income threshold
- Universal credit

All requests for assistance should be via a formal local procedure. In the case of any disadvantaged children, this can be requested by a member of staff leading the visit. In all cases, the approval process employed by the school should be authorised by the Headteacher.

In the event that the trip is cancelled due to unforeseeable circumstances, it is at the Headteacher's discretion as to whether a refund is given to parents. The Headteacher will consult the local governing body on the matter, taking into account the cost to the school, including alternative provision costs.

In the event that a pupil cancels their place on a trip, it is at the Headteacher's discretion as to whether a refund is given to parents.

The school will take a common-sense approach to refunds and cancellations, ensuring that all pupils are treated equally. Any charge made in respect of pupils will not exceed the actual cost of providing the trip divided equally by the number of pupils participating.

19. Trips Abroad

When planning school trips abroad, the school will consider the Foreign and Commonwealth Office's guidance 'Safer adventure travel and volunteering overseas' (2015) and, where an activity poses significant risks, the school will also consult the British Standard for adventurous activities outside the UK.

Validity of passports, visa requirements and other entry requirements, e.g. vaccination status, will be researched and dealt with within three months of the initial notification of the trip, to avoid problems when the trip is due to take place.

Staff and pupils will be taught about the culture and values of the country they are visiting, to ensure they understand and respect the values of the citizens.

Before the trip the educational visit coordinator will check the travel advice for each country the trip will visit to ensure no visa or permit is needed and to check any other regulations or time limitations.

Staff and pupils will be made aware that they must not have spent over 90 days in the EU, Switzerland, Norway, Iceland or Liechtenstein, within a 180-day period if they intend to participate in any trips within these countries.

Before the trip, the relevant healthcare and travel insurance checks will be conducted to ensure attendees are covered for medical issues or accidents.

Pupils and staff will be informed if they need to apply for a free Global Health Insurance Card (GHIC) or European Health Insurance Card (EHIC) to ensure they can access state-provided healthcare during a temporary stay in the EU.

Before the trip, staff are trained in spotting suspicious behaviour and remaining vigilant whilst abroad. Before the trip, pupils will be taught how to remain vigilant in the country they are visiting, particularly about advances from strangers.

Registers will be taken at the start and end of each day, as well as before, during, and after events, and at regular intervals whilst on days out to ensure the whereabouts of pupils are known at all times.

Staff will check the location's local news at the start of each day of the trip, to ensure their planned activities are safe to go ahead. A minimum of two members of staff attending the trip will have at least an intermediate understanding of the destination country's language.

At the start of the trip, all pupils and staff are provided with an emergency contact sheet, this includes the trip leader's mobile phone number, as well as emergency numbers and phrases for the country they are visiting.

When using external providers abroad, the school will check whether the provider holds an equivalent of the 'Learning Outside the Classroom Quality Badge'. If no such equivalent can be ascertained, the school will make checks prior to agreeing to use the provider.

20. Reviewing Visits

Schools must have arrangements in place to review the outcomes of visits, including learning outcomes and consider any lessons learnt. This is essential where visits have involved accidents or a critical incident.

Following an educational trip and/or visit, the educational visit coordinator will meet with any staff members present on the trip to assess the success of the trip in respect of both educational value and safeguarding effectiveness.

Based on this assessment, recommendations will be made to improve future trips and visits.

As part of the ELAN commitment to sharing best practice and quality assessment, Headteachers will share best practice for educational visits and create a shared environment of support and collaboration to this policy across the Trust at the Headteachers and Central Leads meeting at least once per academic year. Educational visits will be an agenda item.

(See Appendix 9 – Educational Visit Evaluation Form)

21. Policy Review

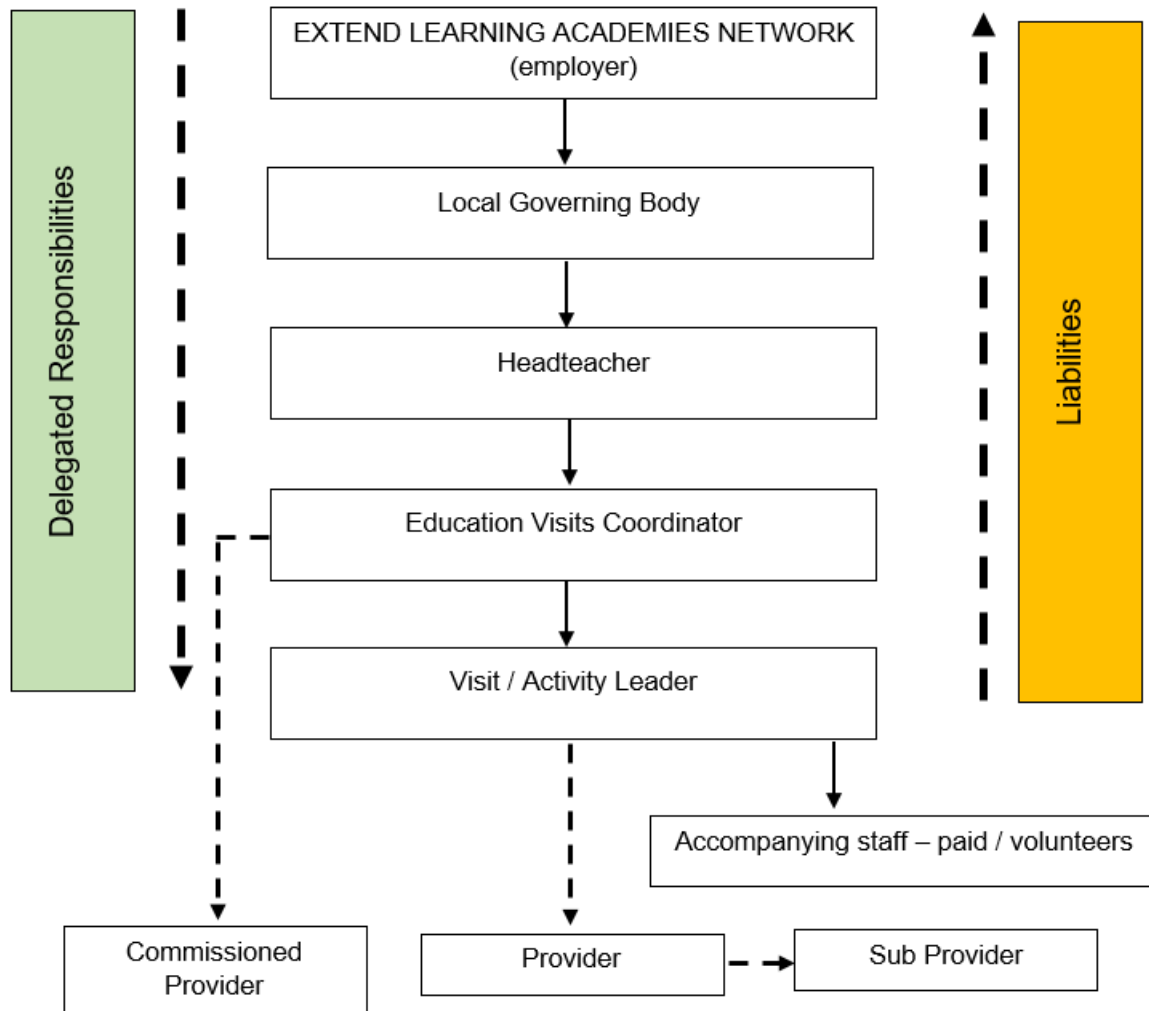
The effectiveness of this policy will be monitored by the ELAN board, Trust Estates Manager, school Headteacher's, and Local Governing Bodies.

This Policy will be reviewed annually.

22. Useful Information

OEAP Signpost	
OEAP Home Page	https://oeapng.info/
OEAP Training: <ul style="list-style-type: none"> • Educational Visits Coordinator • Visit Leader • Outdoor and Environmental Learning Cards • Management of an Offsite Visit • Emergency 	https://oeapng.info/about-oeap-training/#1629973180682-ed60ecab-c93e
National Guidance Documents: <ol style="list-style-type: none"> 1 – Basic Essentials 2 – Making the Case 3 – Legal Framework & Employer Systems 4 - Good Practice 5 – Policies & Evaluation 6 – Frequently Asked Questions 7 – Specific Types of Visit, Activity & Hazard 8 – Checklists, Model Forms, Mind Maps & Training Resources 	https://oeapng.info/guidance-documents/

Appendix 1 - Educational Visits - Responsibilities and Liabilities



Appendix 2 – Visit Proposal in Principle

Name of Visit Leader:	
Visit to:	
Date of Proposed Visit:	
Departure Time: Return Time:	
Description of place(s) to be visited and activities undertaken:	
Intended Learning Outcomes:	
Transport Arrangements:	
Year Group(s):	
Number of Learners (approx):	
Number and names of staff:	
Cover Implications:	
Estimated cost – Please provide a breakdown of costings i.e. entrance fee/travel costs etc.	
Risk Assessments Required:	
Received by EVC:	Date:
Approval to proceed in principle.	Headteacher signature:
YES/NO	Chair of Governor's signature:
	Date:

Appendix 3 - Educational Visits: Categories of Risk

‘Low risk’ A - Simple ‘local’ everyday activities usually within the normal school day

- Local Sports Fixtures (not involving longer travel distances / residential activity)
- Local Swimming in Indoor pools (with lifeguard / swimming coach)
- Local Theatre and Museum’s
- Local Village / Town / Shopping areas
- Local Church / Sacred Spaces
- Local Parkland including simple water margins activity
- Local Country Parks
- Local Study / Visitor Centres
- Local Countryside Walking (simple lowland rural terrain)
- Local Visits to local schools / business
- Local Music events and concerts
- Local Low-level initiative and team building activity (simple activity)

‘Medium risk’ B - Not every day simple activity activities in or outside school day

- Larger Town / City visits (easy to manage environments / managed public interaction) including Theatres, Museums and Music Events
- Forest Schools and Bushcraft (away from site but not in remote locations)
- Orienteering / Navigation in local parkland / small woodland areas (good geographical boundaries)
- Larger conference and exhibition venues or similar environments
- Lower level / non-wild terrain field studies (be aware of wild /mountainous areas, seaside locations and anywhere close to / in water)

‘Higher risk’ C – More complex activities in or outside school day

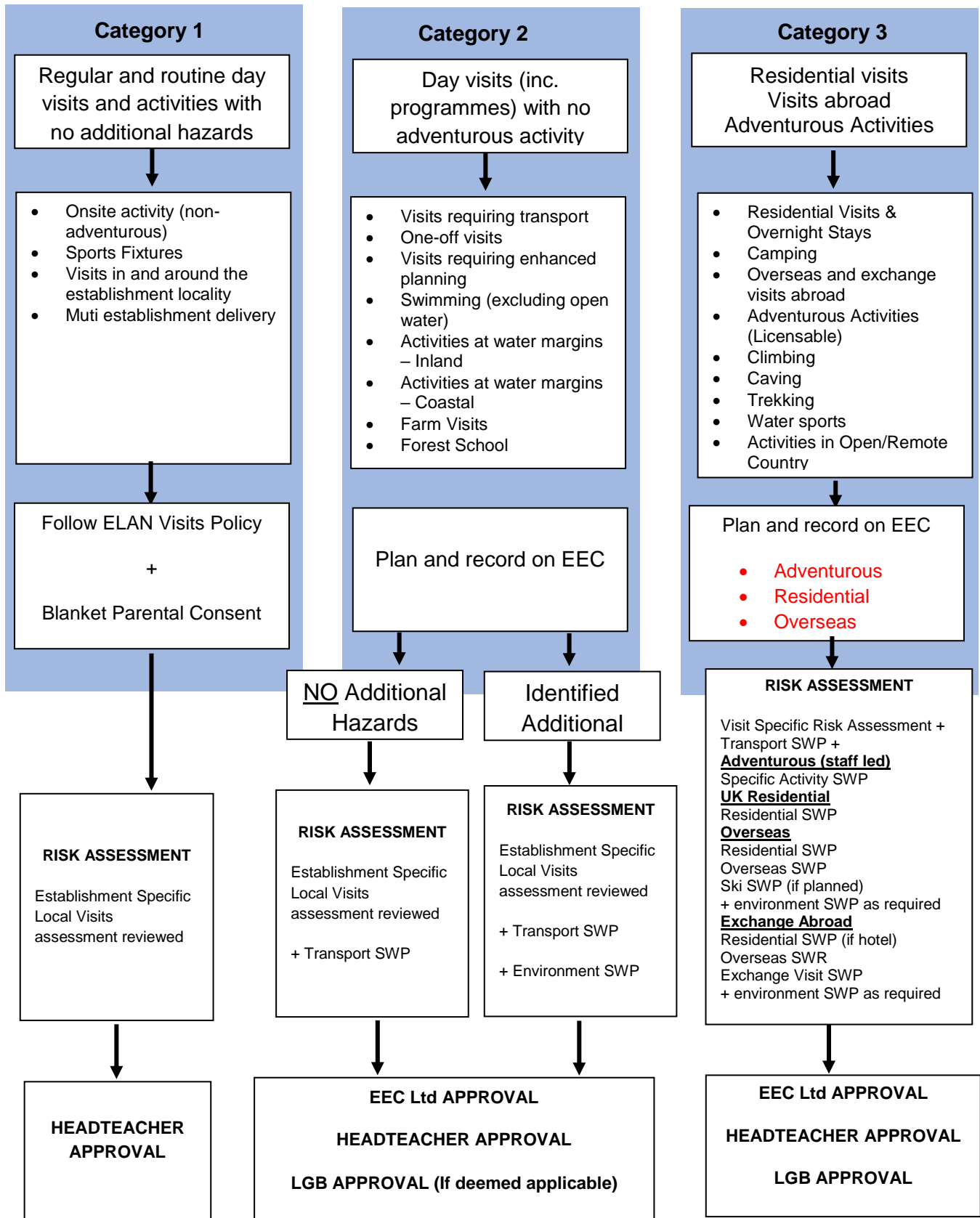
- All UK residential visits (non-adventurous activity)
- All Outdoor Adventurous Activity (OAA) including DofE Expeditions
- All Overseas visits including residential
- Field Studies undertaken in wild / remote terrain
- Large City locations (students on foot / use of public transport / difficult to manage public interaction)
- Higher Level Ropes Courses / Aerial Runways
- Other complex visits

*** The following are usually defined as Outdoor Adventurous Activities (OAA)**

- Remote, Higher-level Hill / Mountain walking
- Cave / Mine exploration (not guided show caves)
- Rock climbing / Abseiling (indoor / man-made / natural rock)
- Mountain / All Terrain Biking
- Orienteering and Navigation (forests / wild or mountainous terrain)
- Skiing / Snowboarding / Tobogganing (indoors / outdoors)
- Gorge scrambling / Sea level traversing / Canyoning
- Improvised Rafting / Canoe / Kayaking / White-Water Rafting
- Sailing / Windsurfing / Paddle boarding
- Open Water Swimming (lakes / rivers / sea)
- Pony Trekking in remote / wild / mountainous terrain
- Higher Level Ropes Courses / Aerial Runways

This list is not designed to be exhaustive.

Appendix 3a - Visits Process Flowchart Categories 1 – 3



Appendix 4 - External Visits Coordinator Checklist

This checklist is designed to provide the EVC prompts to consider when your school/establishment plans its programme of off-site visits

Areas of Focus	Sample Questions / Indicators	✓, X or N/A
Venue	Venue or location meets the aims/objectives of the trip	<input type="checkbox"/>
Visit Leader	Clearly identified competent leader	<input type="checkbox"/>
	Planning checklist completed	<input type="checkbox"/>
	Named deputy leader & staff	<input type="checkbox"/>
	Accompanying adults / need DBS check?	<input type="checkbox"/>
	Communications	<input type="checkbox"/>
Staffing	Adequate ratios	<input type="checkbox"/>
	First Aid cover	<input type="checkbox"/>
	Staff briefing	<input type="checkbox"/>
Visit	Leader has discussed with EVC?	<input type="checkbox"/>
	EEC Ltd notification/endorsement required?	<input type="checkbox"/>
	Head/Governors approval required?	<input type="checkbox"/>
	Is there a need for a preliminary visit?	<input type="checkbox"/>
	Fire Safety	<input type="checkbox"/>
	Generic & event specific risk assessments in place (including Plan 'B')	<input type="checkbox"/>
Activities	Local Learning Environment (Category A)	<input type="checkbox"/>
	Adventurous Activities (e.g., Overnight or residentials – Category B)	<input type="checkbox"/>
	Swimming	<input type="checkbox"/>

Participants	Participants briefing	<input type="checkbox"/>
	Behavioural expectations/contracts	<input type="checkbox"/>
	Special needs	<input type="checkbox"/>
	ID/ information cards?	<input type="checkbox"/>
Medical	Medical & contact details of pupils	<input type="checkbox"/>
	Medical & contact details of staff	<input type="checkbox"/>
Parents	Have signed parental consent forms been issued / collected?	<input type="checkbox"/>
	Have parents been fully informed of the programme?	<input type="checkbox"/>
	Parents' meeting arranged?	<input type="checkbox"/>
Transport	Minibus – Hired/own- Driver approved?	<input type="checkbox"/>
	Coach- Seat belts?	<input type="checkbox"/>
	Public Transport, Train, Air, Ferry, Bus	<input type="checkbox"/>
	Private Cars – Roadworthy/ insurance/parental permission?	<input type="checkbox"/>
Finance	Charging policy	<input type="checkbox"/>
Insurance	Insurance cover checked	<input type="checkbox"/>
Emergencies	24 home base contacts	<input type="checkbox"/>
	Critical incident plan in place?	<input type="checkbox"/>
Post Visit	Accident/near miss reporting	<input type="checkbox"/>
	Celebrate success?	<input type="checkbox"/>
	Need for training?	<input type="checkbox"/>
	Succession Planning?	<input type="checkbox"/>

Appendix 5 – Emergency Action Plan – Visit Leader/Accompanying Staff

Immediate Action

1. Assess the situation, establishing the nature and extent of the problem but ensuring that the leaders do not put themselves at further risk.
2. Make sure all other members of the party are:
 - Accounted for
 - Safe
 - Adequately supervised
 - Briefed to ensure that they understand what to do to remain safe.
3. Leaders should assume their allocated roles – ensuring that where one or more of the Visit Leadership Team is incapacitated then these roles are reassigned on a priority basis.
4. If there are injuries, take action to establish their extent and administer appropriate first aid.
5. Contact the appropriate emergency services if required (*see Communications 1. below*)

First Aid

Aim to:

- Preserve life
- Prevent the condition worsening
- Promote recovery – treat for shock – reassure and keep warm

Communications

Direct contact with a Parent of a group member, from the scene of the incident should be avoided. This task should be carried out by the schools' emergency contact person or nominated representative(s).

1. Contact the appropriate emergency service(s). They will guide you through the information they need but this will include:
 - Your name and the name of the group
 - Location
 - Nature of emergency and number of injured persons
 - Action so far
2. Control any communications by the rest of the group. Rumours spread very quickly and can cause serious and unnecessary upset.
3. Alert the schools Emergency Contact: You may be in shock and need support. Also, news travels fast and the school will need accurate information.

Consider other people who may need contacting:

- Emergency Services (UK 999, EU 112)
- Embassy/Consulate if overseas
- Local accommodation/contact
- Tour operator/provider
- Insurer

DO NOT speak to the media. Refer all media interest/enquiries to the school.

Secondary Action

1. Arrange appropriate protection from the elements.
2. Uninjured group members should be moved to shelter or away from the immediate vicinity of any casualties. Ensure that they:
 - Are adequately supervised throughout
 - Are returned as early as possible to base
 - Receive appropriate support and reassurance
3. Avoid dividing the group – unless it is the only way to get help – and leave nobody on their own.
4. Manage the incident – ensure that all appropriate actions have been/are being attended to.
5. It is useful to keep an accurate record of events and actions as close to real time as possible. Any leader with spare capacity should, therefore, keep notes – see below re: recording an incident.
6. Ensure that an appropriate adult accompanies any casualties to hospital, taking with them parental consent forms and appropriate medical information for the injured persons.
7. Maintain contact with the emergency services and the school contact until the Emergency is over.

Monitor, reassess and review – ensure nothing has been forgotten and all leaders and young people are coping, cared for and secure.

Post-Incident Action

- Consider the emotional needs of any staff or young people who may have been adversely affected.
- Follow the schools' reporting requirements, including completing any accident and incident forms and complying with RIDDOR regulations.
- Review the lessons learned and ensure that these feed into future visit plans, emergency plans and staff training.
- Share the experience and learning with colleagues.

Media/legal points

- Do not admit anything
- Do not sign anything
- Avoid discussing legal liability with others
- Do not talk to the press – refer them to the school's media contact
- Record all events, times, and details – establish witness contact details and get statements from leaders

Recording and incident

Make an accurate record of all details as soon as possible – do not leave this until later when your memory of details may be confused. Record the following:

- Time, date, and nature of the incident
- Accurate incident location
- Names of casualties
- Details of injuries
- Actions taken, including all communications (include times)
- Names of others involved but not injured
- Details of any moves from the incident site (times, who moved, where to, how)
- Names and contact details of witnesses
- Proposed actions.

Appendix 6 – Educational Visits Consent Form

Educational visits consent form			
Pupil details		Visit details	
Name:		Destination:	
Year group:		Date:	
Date of birth:		Time:	
Home telephone number:		I acknowledge the need for my child to behave responsibly <input type="checkbox"/>	
Please detail below if your child suffers, even mildly, from any medical condition such as epilepsy, asthma, diabetes, heart condition, allergies, bed wetting or physical weakness. Also, if your child has suffered from any contagious or infectious diseases during the past three months, please detail these. All information will be treated in confidence.			
When did your child last have a tetanus injection?			
If your child is taking medication, please give details, including whether it can be self-administered:			
Is your child allergic to any medication? YES/NO. If yes, please specify:			
Please give details of any special dietary requirements and the type of pain/flu relief medication your child may be given if necessary:			
Family doctor:		Telephone number:	
Address:			
I am happy to let my son/daughter make their own way home <input type="checkbox"/>			
I will collect my son/daughter at (School to Insert Time) from _____			
I give permission for my child to participate in the above school visit and I have read all the information given. I further consent to my child being given any urgent medication or surgical treatment which may be considered necessary by the medical authorities during the school visit. I understand that my child is covered by the school's liability insurance , and that I am able to take out my own additional insurance if I wish. I will inform the school of any change in the circumstances outlined above.			
Signed: _____ Date: _____			

<p>Parent/Guardian's name in BLOCK capitals:</p> <p>_____</p> <p>Address:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Telephone number:</p> <p>_____</p>	<p>Please give an alternative contact name and telephone number in case we cannot reach you in an emergency:</p> <p>Emergency contact one</p> <p>Name: _____</p> <p>Telephone number: _____</p> <p>Relationship to pupil: _____</p> <p>Emergency contact two</p> <p>Name: _____</p> <p>Telephone number: _____</p> <p>Relationship to pupil: _____</p>
--	--

Appendix 7 - Ratios and First Aid Requirements

Staffing ratios are a risk management issue and should be considered through the process of risk assessment. It is not always possible to set out definitive staff/ pupil ratios for a particular age group or activity. However, ELAN expects the following as normal **minimum** requirements, and any variation should be discussed with the Headteacher/EVC in the first instance.

1. Whilst there is no longer a statutory requirement in general for a set ratio of supervision or for having a First Aider on trips; there is an exception with regard to children under five, where a Paediatric First Aider must accompany the group.
2. In respect of Item 1 however, ELAN schools are expected to adhere to the principle of previous National guidance on ratios that reduce as children get older. The principle that all trips should be assessed on location, risk and the specifics of the cohort is sound, but whilst local discretion may be used, a change in ratio and/or first aid cover must not result in increased risk.
3. ELAN expects **ALL** trips away from the school site to have a First Aider present (Paediatric First Aider for 4+ and Year 1 age groups).
4. All sports event leaders must have access to a First Aid Kit and a First Aider. A First Aider should be present at any sports fixture. All Sports Club Leaders should have a First Aid Certificate or be accompanied by a qualified First Aider.

Supervision Ratios

School Year	Category A – Low Risk	Category B – Medium Risk	Category C – Higher Risk
Reception, Year 1 + 2	1:8	1:6	N/A
Years 3 + 4	1:10	1:8	1:8
Years 5 + 6	1:15	1:10	1:8
			Plus, an additional member of staff in case of emergency
			Minimum of 2 staff for overseas visits

Notes:

- *Please remember that 3rd party provider ‘free staff place’ ratios may not reflect those shown above and should be negotiated were applicable prior to signing agreements.*
- *Trip planning should consider gender issues where children will be required to use public toilets; and where possible include male and female supervisors in the group.*

Appendix 8 – Financial Planning proforma.

(Excel template available from Central Finance or can be located on the Staff Portal)

School:

TRIP DETAILS:

Trip Name		Year group:	
Trip Date		Number of Pupils:	
Trip Organiser:			

TRIP COSTINGS

	Supplier	Purchase Order No	Cost
Transport costs:			£
Entrance fees/Accommodation:			£
Additional activities (please give details)			£
			£
			£
			£

Supply cover (if required)	No of days/half days	Cost per day/half day	
Full days:			£
Half days:			£
Additional Costs (please specify)			£
			£
			£
			£
ParentPay fees (approx)			£
Total anticipated cost:			£

Appendix 9 - Educational Visit Evaluation Form

Visit			
Date of Visit		Organiser	
How successful was the visit in meeting the intended aims?			
Where applicable, did the visit provide good value for money?			
Any incidents or near-misses to report? What actions were taken as a result?			
<p><i>Please write none if nothing to report.</i></p> <div style="height: 150px;"></div>			
What, if anything, would you amend for a future visit?			

Appendix 10 – Overview Flowchart for ELAN Educational Visits

