



# Educational Visits Policy

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*Together, pursuing life in all its fullness*

| <b>Version</b> | <b>Date</b> | <b>Author</b>                    | <b>Changes</b>   |
|----------------|-------------|----------------------------------|--|
| v1.0           | 14/03/16    | MAT H&S Advisor                  | v1.0 approved by MAT Board   |
| v2.0           | 21/02/18    | MAT H&S Advisor                  | reflect use of electronic management system  |
| v3.0           | 16/03/18    | MAT H&S Advisor                  | reflect visit advice competencies and need to use approved adventurous activity providers  |
| v4.0           | 27/02/19    | MAT H&S Advisor                  | Clarification of when visit leader training required (section 2b and new flowchart appendix 3). Remove requirement for board member signature. Add consent form (section 12 and appendix 4). Add governor monitoring requirement (section 13). |
| v5.0           | July 2019   | MAT H&S Advisor / Louise Beale   | Clarification of roles and responsibilities. Form separated out.   |
| V6.0           | July 2022   | Trust H&S Advisor / Louise Beale | Trust wide policy with no personalisation. Clarification that adventurous activities include the planned use of water. Removal of LGB responsibilities. Change of H&S Advisor.   |
| V6.1           | Dec 2025    | Deb Bacon                        | Reviewed, links updated, no material changes   |

|                             |                                  |
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| <b>Lead/owner</b>           | Head of Operation and Compliance |
| <b>Target audience</b>      | All Staff                        |
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The electronic version is the definitive version of this document.

## 1. Context/Policy Statement

The Diocese of Coventry Multi Academy Trust (the Trust) believes 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 the Trust a supportive and effective learning environment. The benefits of pupils taking part in visits and learning outside the classroom include (but are not limited to):

- Improvements in their ability to cope with change and novelty.
- Increased critical curiosity and resilience.
- Opportunities for meaning making, creativity, developing learning relationships and practicing strategic awareness.
- Increased levels of trust and opportunities to examine the concept of trust (us in them, them in us, them in themselves, them in each other).
- Improved achievement and attainment across a range of curricular subjects. Pupils are active participant's not passive consumers, and a wide range of learning styles can flourish.
- Enhanced opportunities for 'real world' 'learning in context' and the development of the social and emotional aspects of intelligence.
- Increased risk management skills through opportunities for involvement in practical risk-benefit decisions giving them the tools and experience necessary to assess their own risks in a range of contexts.
- Greater sense of personal responsibility.
- Possibilities for genuine team working including enhanced communication skills
- Improved environmental appreciation, knowledge, awareness and understanding of a variety of environments.
- Improved awareness and knowledge of the importance and practices of sustainability.
- Physical skill acquisition and the development of a fit and healthy lifestyle.

The Trust fully recognises that learning outside the classroom helps to bring the curriculum to life as it provides deeper subject learning and increases self-confidence. It also helps pupils develop their risk awareness and prepares them for their future working lives the Trust adopts the Outdoor Education Adviser's Panel (OEAP) National Guidance for all educational visits available at [National Guidance |](#)

## 2. Employer responsibilities

As employer, the Trust meets its obligations to provide staff with guidance, training and support in the following ways:

**a. Appropriate guidance.**

- The appropriate guidance for the management of outdoor learning and off site visits is the OEAP National Guidance web site – [National Guidance |](#)

**b. Training to support the guidance to ensure that it is understood.**

- For those involved in managing and leading visits the relevant training courses are:

1. **Educational Visit Coordinator (EVC) Training** – The Trust requires the academy EVC to be appropriately trained.
2. **Visit Leader Training** – The Trust requires all employees who lead trips or visits of a residential nature or whereby they lead an adventurous activity (including the planned use of water) to undertake this training.

*Note: Local trips within the Academy Learning Area (see appendix 1) or regularly undertaken day trips to environments regularly visited by schools may be led by competent staff who have not attended Visit Leader training on authorisation of the Head Teacher.*

- c. **Suitable systems and processes to ensure that those trained are kept updated.**
  - For the purposes of day-to-day updating of information, EVCs and Visit/Activity Leaders are directed to the periodic news items and updates of OEAP National Guidance.
- d. **Access to advice, support and further training.**
  - Where an employee experiences problems with finding the material they are looking for, or require clarification or further help, guidance or bespoke training, they should contact their appointed Education Visit Advisor Service, Plumsun Ltd.

### 3. Application

This policy covers any visit that leaves the academy grounds, whether as part of the curriculum, during academy time or outside the normal academy day.

The Trust adopts the Outdoor Education Adviser's Panel (OEAP) National Guidance available at [National Guidance](#) |

All staff are required to plan and execute visits in line with this policy and National Guidance. Staff are particularly directed to be familiar with the roles and responsibilities outlined within National Guidance.

### 4. Roles and responsibilities

**Visit Leaders** are responsible for the planning of visits but should involve both accompanying colleagues and the pupils in this process. Visit Leaders must make appropriate checks on venues and third-party providers. Visit Leaders are advised to obtain outline permission for a visit from the Head Teacher before beginning to plan/making any commitments.

Visit Leaders are responsible for the content of the planning information within the Plumsun portal, whilst admin support can be obtained where required, the Visit Leader is responsible for the content and must submit the visit under their own profile thus accepting responsibility.

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

**The Education Visit Coordinator (EVC)** is responsible for supporting and challenging colleagues over visits and learning outside the classroom. The EVC is 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.

The Trust requires the EVC to be an appropriate member of staff with the correct skills for the role. In all but exceptional circumstances this must not be the Head Teacher.

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

**The Head Teacher** has responsibility for the final approval and monitoring of all visits.

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

### **The Diocese of Coventry Multi Academy Trust**

The Health and Safety at Work etc. Act 1974 places overall responsibility for health and safety with the employer.

As the employer the Trust must be informed of all residential visits, foreign travel and any adventurous activities for example climbing, caving and water sports. This can be achieved by Trust schools using the online Plumsun Portal.

### **Educational Visit Advisor Service**

It is required that the visits and activities, listed below, are checked by an independent Education Visits Advisor Service (who should be deemed competent to provide advice and guidance) before the activity takes place – see page 6 of this policy detailing the process to be followed.

- overnight stays
- foreign travel
- adventurous activities

The Trust obtain advice/support relating to Educational Visits from the H&S professionals at Plumsun Ltd.

The following visits will not fall under the remit of Plumsun.

- Visits where schools choose to directly lead and deliver adventurous activities i.e. school staff member leading a climbing activity, kayaking, skiing etc.
- Give specific advice regarding Duke of Edinburgh Expeditions.

The Trust require all adventurous activities (including the planned use of water) to be delivered by a LoTC/AALS badge/licence holder unless specific permission to deviate from this has been given by the Trust CEO.

## 5. Preliminary Visits and Provider Assurances

### Preliminary Visits

The Trust 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 academy.
- Residential visits, visits abroad, exchange visits, adventure led by the academy, 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

The Trust takes the view that where a provider holds 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 8.8p – Provider Questionnaire -

<http://oeapng.info/downloads/all-documents/> should be followed when undertaking pre visits and assessing providers.

## 6. Types of Visits and Approval

There are four types of visits, for each of which the approval process is slightly different:

1. Visit / activities within the Academy Learning Area (see appendix 1) and which involve no more than an everyday level of risk. Visits that are part of the curriculum and take place during the academy day do not require consent. Those that are not part of the curriculum or extend beyond the academy day can be covered by blanket consent, but information will be provided to parents in advance and they will have the opportunity to withdraw their child. These follow the learning area operating procedure (appendix 1). Visit leader to collate and input information onto the Plumsun portal.
2. Other day visits within the UK excluding adventurous activities (adventurous activities include the planned use of water). Visit Leaders to gain outline permission for visit from Head Teacher. Visit leader to collate and input information onto the Plumsun portal, all information must be uploaded prior to submitting to the EVC for approval at least 6 weeks in advance, once reviewed by the EVC, final approval for the visit will be given by the Head Teacher.
3. For all residential visits, adventurous activities (including the planned use of water) or visits involving foreign travel. Visit Leaders to gain outline permission for visit from Head Teacher. Visit leader to collate and input information onto the Plumsun portal, all information must be uploaded prior to submitting to the EVC for approval at least 6 weeks in advance, once reviewed by the EVC, the visit will be given outline approval by the Head Teacher. Once outline approval has been given, the visit will then be scrutinised by the Educational Visits Advisor (Plumsun) to ensure the visit complies with the OEAPNG after which final approval will be given by the Headteacher. The Educational Visits Advisor (Plumsun) must receive the visit notification at least 4 weeks in advance of the visit occurring.

For visits involving adventurous activities: Visit Leaders must check if an activity provider holds either an AALA licence [Adventure Activities Licensing Scheme \(AALS\) - Looking for a provider?](#)

or a LOTC quality badge (<http://www.lotcqualitybadge.org.uk/search>). If not the Visit Leader must send the OEAP National Guidance document 8p 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 form (NG document 8p provider questionnaire) <http://oeapng.info/downloads/model-forms-mind-maps-and-checklists/>). Returned questionnaires must be scrutinised by Visit Leaders.



## 7. Staff Competence

The Trust recognises that staff competency is the single most important aspect of safe visit management and supports 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 consider 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.

## 8. Requirement to Ensure Effective Supervision

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'.

The academy 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/>

## 9. Emergency procedures

**A critical incident is any incident where events go beyond the normal coping mechanisms and experience of the visit leadership team.**



The Academy has an emergency plan in place to deal with a critical incident during a visit (see Appendix 2). All staff on visits are familiar with this plan and it is tested at least bi-annually and following any major staffing changes. See also <http://oeapng.info/downloads/good-practice/>

When an incident overwhelms the establishment's emergency response capability; where it involves serious injury or fatality or where it is likely to attract media attention then assistance will be sought from the Trust central team

The Academy will practice their response to emergency situations on educational visits at regular intervals i.e. academy inset training.

## 10. Visit Planning

The Visit Leader checklist – National Guidance document 3.3e <http://oeapng.info/visit-leader/> is an important check on the planning of a visit. When a Visit Leader cannot answer yes to a question on this checklist there should be a discussion with the EVC and or Head Teacher. In addition, the following steps must be completed for any visit:

- Gain outline approval from the Head Teacher to begin planning the visit and agree funding mechanism / charging y in line with the Trust Charging and Remissions Policy.
- Ensure the visit:
  - has clear learning outcomes
  - has activities appropriate to the group
  - is planned to maximise benefits to the pupils while managing significant risks
  - is appropriately staffed
  - complies with the academy's safeguarding policy
- Involve pupils in the planning of the visit, and how it will be managed, wherever possible.
- Ensure emergency procedures include what would happen in the event of illness or injury affecting the visit leader.
- Ensure the base contact back at academy is fully briefed and has copies of all relevant information.
- Ensure that the visit is correctly approved and recorded.

## 11. Risk Management

The risk management of an activity/visit should be informed by the benefits to be gained from participating. It is recommended a "Risk-Benefit Assessment" approach, whereby the starting point for planning should be a consideration of the targeted 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.

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 academies and visit leaders

should use the format that has been identified in the academy risk assessment procedure and follows 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/>

## **12. Parental Consent**

Some visits do not require consent, all the rest can be covered by a combination of blanket consent (with subsequent information to parents) and visit specific consent - 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 academy site.

The Trust educational visits Consent to Activity, Medical Details and Treatment form must be used for all visits where separate consent is required, see Appendix 4.

## **13. Monitoring**

The Visit Leader should undertake an evaluation of each educational visit and submit this to the Head Teacher and EVC.

Governors should undertake a sample monitoring of visit documentation to include a residential visit and a day trip at least annually.

## **14. Inclusion**

All academies must follow the National Guidance on inclusion see 3.2e <http://oeapng.info/downloads/all-documents/>

## **15. Charging / funding for trips**

All academies must follow the National Guidance on charging for academy trips 3.2c <http://oeapng.info/downloads/all-documents/>

as well as the Trust's Charging and Remissions policy.

## **16. Transport**

All academies must follow the National Guidance on Transport for academy trips see 4.5a transport, 4.5b minibuses, 4.5c Transport in private cars and 4.5d seat belts <http://oeapng.info/downloads/all-documents/>

## **17. Insurance**

Insurance cover for approved educational visits is provided by the Trust's insurance provider (public liability) insurance policy.

## Appendix 1

### Academy Learning Area

#### General

This operating procedure applies to visits within the Academy Learning Area. It covers:

- a. Visits / activities that are part of the normal curriculum and take place during the normal academy day. These do not require parental consent.
- b. All other visits / activities within the Learning Area (those that take place beyond the academy day or are not part of the curriculum) are covered by blanket consent, but parents will be informed in advance and given the opportunity to withdraw their child.

These visits/activities:

- Do not normally need additional risk assessments / controls beyond following the operating procedure below. However, where a specific risk is identified because, for example, a particular pupil's needs then a review of the individual pupils' risk assessment should be made and a record kept.

#### Operating Procedure for Academy Learning Area

The following are potentially significant hazards within Academy Learning areas:

- Road traffic
- Other people / members of the public / animals
- Losing a pupil
- Uneven surfaces and slips, trips, falls
- Weather conditions
- Activity specific issues when doing environmental fieldwork (nettles, brambles rubbish etc)

These are managed by a combination of the following:

- The Head Teacher must give approval before a group leaves.
- Only staff judged competent to supervise groups in this environment are approved. A list of approved staff should be maintained by the EVC and Head Teacher.
- The concept and operating procedure of the extended learning area is explained to all new parents when their child joins the academy.
- There will normally be a minimum of two adults however this *depends on the area and the age / maturity of the pupils*).
- Staff are familiar with the area and have visited previously, including any 'no go areas' and have practiced appropriate management techniques.
- Pupils have been trained and practiced standard techniques for road crossings in a group.
- Where appropriate, pupils are fully briefed on what to do if they become separated from the group.

- All remotely supervised work in the Academy Learning Area is done in 'buddy' pairs as a minimum.
- Pupil's clothing and footwear is checked for appropriateness before leaving academy.
- Staff are aware of any relevant pupil medical information and ensure that any required medication is available and staff are appropriately trained.
- Staff will deposit in the office a list of all pupils and staff, a proposed route and an estimated time of return.
- An academy mobile is taken with each group, and the office have a note of the number.
- Appropriate personal protective equipment is taken when needed (e.g. Hi-viz waist coat for infants).
- A member of the staff accompanying the group is first aid trained.

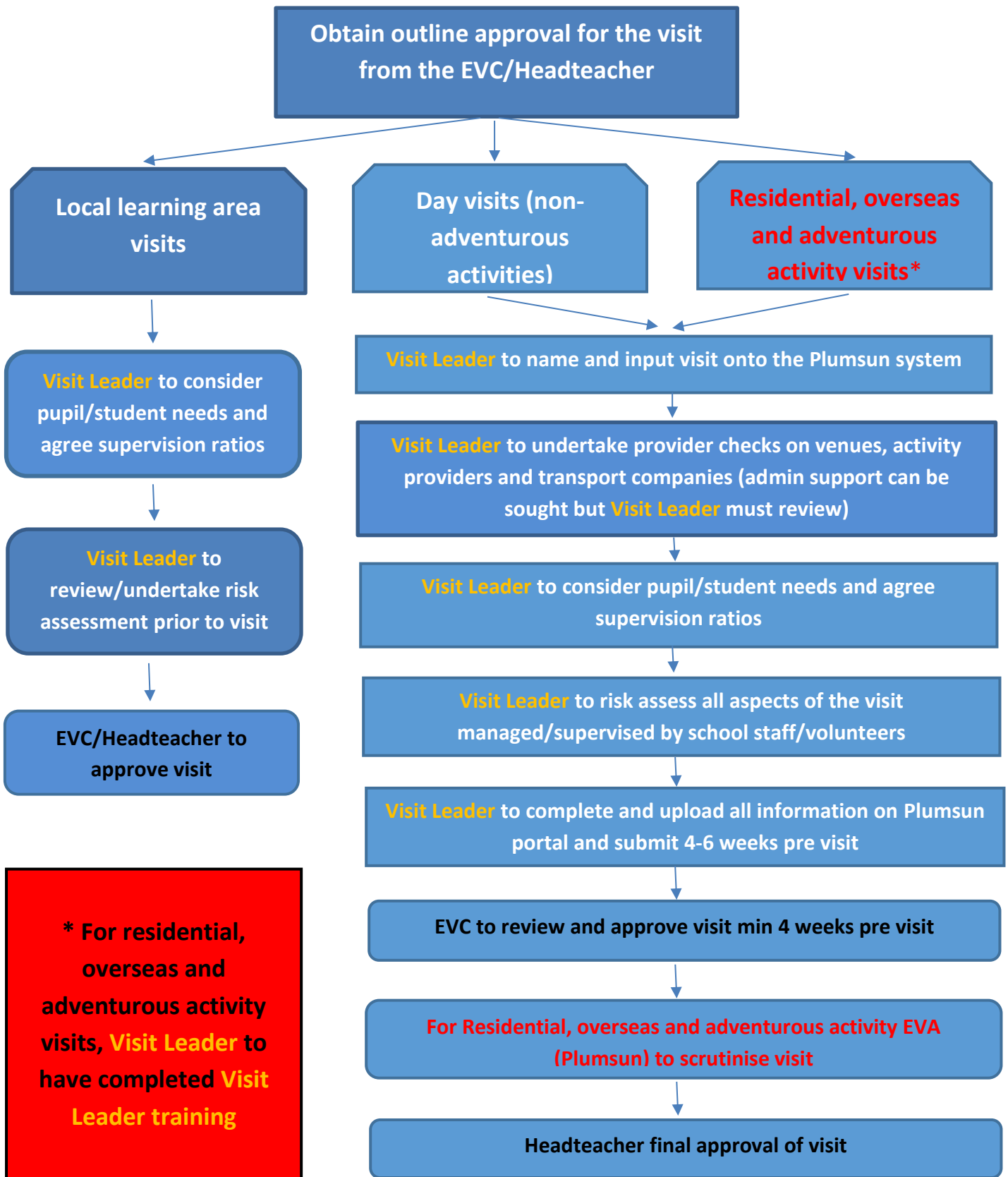
## Appendix 2

### Emergency procedure

The academy's emergency response to an incident is based on the following key factors:

1. There is always a nominated emergency base contact for any visit (during academy hours this is the office).
2. This nominated base contact will either be an experienced member of the senior leadership team or will be able to always contact an experienced senior manager.
3. The visit leadership team and the emergency base contact will both have relevant medical and emergency contact information on all the visit participants, including staff.
4. The visit leader(s) and the base contact know to request support from the Trust if an incident overwhelms the establishment's emergency response capability; involves serious injury or fatality or where it is likely to attract media attention.
5. The Academy Head Teacher has an emergency out of hours contact for the Trust to obtain additional support and resources as required.
6. The academy has personalised National Guidance emergency action cards and the appropriate cards are held by:
  - a. The visit leader(s) <http://oeapng.info/downloads/download-info/4-1d-8-1d-visit-leader-emergency-action-card>  
The visit leader should also have a copy of the visit leader emergency checklist <http://oeapng.info/downloads/download-info/4-1k-visit-leader-emergency-checklist/>
  - b. The first point of contact (*e.g. the office or Head Teacher*) <http://oeapng.info/downloads/download-info/4-1e-8-1e-first-contact-emergency-action-card/>
  - c. The designated emergency contact senior manager <http://oeapng.info/downloads/download-info/4-1f-8-1f-establishment-management-emergency-action-card/>
7. This emergency procedure is tested through both desk top exercises and periodic scenario calls from Visit Leaders.

## Educational Visits Approval Process





## **Appendix 4 - Forms**

**Educational Visit Consent form (consent to Activity, Medical Details and Treatment)**  
available from Information Hub/Forms, Policies and Templates/Central Forms/Health and Safety