



# **Policy and Procedures for Educational Visits**

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**"Enjoy, learn, achieve"**

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## **Policy and Procedures for Educational Visits**

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This document should be used in conjunction with the following documents:

**Policy and Guidance for Educational Visits and Learning Outside the Classroom, Birmingham Local Authority**

Policy and Guidance for Educational Visits and Learning Outside the Classroom (BCC) 2016

Outdoor Education Advisers Panel National Guidance for the Management of Outdoor Learning Off-site Visits and Learning Outside the Classroom Activities (Introduced 2011) [Reviewed and updated on regular basis])

DfE Guidance 2014 Advice on Legal Duties and Powers for Local Authorities, Head Teachers, Staff and Governing Bodies

Health and Safety Executive 2011 School trips and outdoor learning activities: Tackling the health and safety myths.

BCC Guidance - Critical Incidents Management; Guidance for Schools March 2014

## **Aim of the Policy**

- To provide maximum assurance of safety for children and adults on educational visits
- To ensure educational visits are planned as an integrated part of the school curriculum to enhance every child's learning experiences
- To ensure visits offered are suited to the ages, aptitudes and abilities of the pupils taking part
- To ensure visits are well planned and professionally executed and include thorough preparation, debriefing and follow-up work

### **A) Why do we go on educational visits?**

School visits and journeys have educational value both in the contributions they make to the enhancement of the curriculum and the extent to which they extend experiences on a broader level, providing deeper subject learning and increasing self-confidence. They should enhance the educational experience for all children by bringing the curriculum to life through a wide range of activities and constitute an integral part of school life. Educational visits should teach children how to manage risks and allow them to develop their risk awareness, preparing them for their future working lives.

To ensure that every pupil at Grove school, experiences learning outside the classroom. Educational visit are an essential part of learning and personal development, what ever the age ability or circumstances.

At Grove the financial planning supports varied and highly stimulating visits taking place. (See Policy for Charging and Remissions).

## **B) Categories of educational visits and the approval process**

Educational visits are categorised to ensure that the correct risk assessment and preparations are made.

Visits are categorised by Birmingham LEA as follows:

### **Visit type A**

Day visits (less than 24 hrs) which do not include adventurous activities and do not use external centres. Risk assessment to be completed 4 school weeks before the visit is due to take place.

### **Visit Type B (Appendix A)**

Visits which involve any nights away from the school, overseas travel, and/or which involve adventurous activities e.g. climbing wall, canoeing. Form OE2005 should be completed and interim approval sought by the Head teacher. The Head teacher will notify the authority of adventurous activities and overseas visits., for monitoring purposes. OE2005 forms should be sent to the Administrator for Educational Visits at least 3 months before the visit. Schools will be notified of approval.

Visits to parks, shops and libraries in the locality will require a risk assessment to be completed by the Year Group Team. Consent for local visits from parents should be sought at the start of the academic year.

## **C) Leadership of an educational visit**

It is essential that the lead teacher and other members of staff taking part in each educational visit have first hand knowledge of the places to be visited and made a preliminary visit to identify hazards in order to minimize the risks involved for adults and pupils. A risk assessment of the proposed visit should be carried out as part of the pre-planning by the visit leader. This is a legal requirement.

The Headteacher and Assistant Head teachers should be made aware of which pupils and adults are undertaking the visit, departure and arrival times. These arrangements must be made clear in advance to ensure that in the event of any accident the emergency services can be mobilised rapidly.

#### D) Adult/Pupil Ratio

All visits should be accompanied by an adequate number of adults, at least half of these being teachers at the school or staff employed by the school.

Factors for consideration when deciding pupil: staff ratio.

- sex, age, ability of children
- pupils with SEND or medical needs
- the nature of the activities
- experience of adults in off site visits
- duration and nature of the journey
- type of accommodation
- first aid cover
- distance away from school and transport available

The minimum guide for all visits is:

**Nursery classes** - 1 adult : 2 - 3 children

For under 5's the ratio of 1 adult to 2 children should be adopted in hazardous situations eg visits to water, busy shopping and traffic areas. A ratio of 1 : 3 should be acceptable in normal situations.

- Reception                      1 : 3-5
- Years 1 to 3                    1 : 6 - 10
- Year 4 to 6                    1 : 10 - 15

(DFE Health and Safety of Pupils on Educational Visits)

Always assess the risks for a visit and plan for the maximum number of adults.

There should always be a named member of staff in charge, a named deputy leader and enough adults to deal effectively with an emergency. This should be identified in the risk assessment.

#### **E) Parents/Volunteers**

In Early Years Foundation Stage school request parents/carers to attend visits to support their child and/or supplement the ratio. Parents are not requested to join a visit to support their child's medical care needs. Parents are required to pay to attend these visits.

Any other parents/carers who school invite to support an educational visit should be carefully selected by the Year Group Leader and agreed by the Assistant Head Teacher. Any such persons would be in unregulated activity with the children and therefore would not, at any time, be left, or be requested to supervise children without a member of staff from Grove who is in regulated activity with children.

Volunteers and/or parents/carers will need to be clear of their roles and responsibilities and will need to join a briefing meeting with the Year Group Leader.

#### **Roles and responsibilities**

Volunteers who are not employees at the school/centre must:

- understand and agree to the expectations of them;
- understand their relationship to the young people, staff and visit leader;
- recognise the limits of their responsibilities;

- ensure they are not left in sole charge of young people unless this has been formally agreed through a risk assessment and so will be accompanied by a member of Grove staff at all times;
- follow instructions from staff;
- raise concerns for young people's welfare with the visit leader.

Adult volunteers must understand that the principle of duty of care will apply to all who are in a supervisory capacity, though it is likely that courts would expect a greater level of care from staff than from voluntary helpers.

#### F) **Communication with parents**

Parents/carers should be notified of intended visits 4 school weeks before the visit is due to take place. They should be informed of the activities their children will be undertaking, the arrangements for ensuring the children's safety and well being, and of voluntary contributions.

In addition parents should be informed of:

- a. dates and times of travel and return
- b. mode of travel
- c. name of the visit leader
- d. details of the voluntary contribution for the visit
- e. level of supervision
- f. details of venue/site
- g. what pupils are expected to wear, equipment they need to take
- h. details of money to be taken
- i. types of activity to be undertaken
- j. code of conduct for behaviour
- k. purpose of the visit and curriculum content.
- l. lunch arrangements



### **G) Parental Consent**

All trip letters are generated through the ParentPay website.

Where a parent has not paid for the trip, it is the responsibility of the Assistant Head teacher for the phase to meet with the parents and complete Appendix A from the Grove School Charging and Remissions Policy prior to the trip.

A parental consent form should be obtained for all visits.

A consent form should also form the basis for obtaining details regarding:

- collection of the child if the visit returns after the end of the school day
- medical conditions
- emergency contact details (for overnight visits two emergency contact numbers should be given.)

Class teachers should check consent forms prior to the trip to ensure all information is correct.

Group leaders should take all consent forms and medical information for their group with them on a visit.

### **H) Other Consent**

The Headteacher should consider whether consent should be obtained before pupils can be carried in a teacher's private vehicle.

### **I) Medical Arrangements**

At least one member of staff should have a First Aid Certificate.

- all pupils and adults should be medically fit to undertake all activities

- parents should give details of medical conditions on the consent form
- group leaders for each group should take responsibility for ensuring regular medication is used properly (for overnight visits this should be overseen by the teacher in charge)
- pupils suffering from asthma should keep inhalers at hand
- in the event of a pupil suffering an accident or illness medical attention should be obtained
- adults attending the visit should also ensure that any medical needs they may have are included on the risk assessment.
- prior to an overnight visit parents for children with medical needs should have been met with to review care plans and discuss administration of medicine.

## **J) Arranging an Educational Visit**

The person in charge of the visit should:

- i) request preliminary booking arrangements and costing be made by Mrs K O' Mahoney (see costing sheet - Appendix B)
- ii) ensure all aspects of Year Group Leader checklist have been completed (Appendix c).

Members of staff attending the trip should:

- i) carry out a preliminary site visit
- ii) draft a risk assessment based on the above information

The above information should be submitted to the Headteacher 4 weeks in advance of the proposed date for the visit.

vii) once the visit is approved:

- confirmed booking - K O'Mahoney
- letter to parents - K O' Mahoney
- OE2005 to LEA - K O'Mahoney
- risk assessment updated and approved 2-week before the visit

## **Roles and responsibilities**

### **THE VISIT LEADER**

For the majority of educational visits the visit leader will be a teacher. When a visit involves a small number of pupils a member of the support staff may lead the visit.

Any member of staff leading a visit should be able to meet the educational aims of the visit and is competent in all the visit requirements.

In addition to the responsibilities implicit in the above paragraphs, the Visit Leader will have overall responsibility for management of the visit and must:

- follow LA and governing body regulations, guidelines and policies;

- recognise that whilst leading the visit he / she is representing the Headteacher, school and LA;
- ensure that all accompanying adults, whether employees or volunteers, are fully briefed on their roles and responsibilities;
- ensure the overall maintenance of supervision, order and discipline at all times;
- make adequate arrangements for the safety and well-being of all young people at all times;
- follow child protection and safeguarding procedures;
- make appropriate and adequate preparations for emergencies and ensure that all accompanying leaders are familiar with these procedures;
- arrange for clearly understood delegation in the absence of the visit leader;
- ensure that persons instructing adventure activities are properly qualified and centres have appropriate licences.
- ensure that the visit and activities are suitable for the group;
- ensure that accompanying adults are aware of any special educational or medical needs;
- carry out a comprehensive risk assessment and obtain the Head's/EVC written approval.
- make sure that the establishment visit policy supports principles of inclusion by:
  - i) a presumption of an entitlement to participate
  - ii) direct or realistic adaptation or modification
  - iii) integration through participation with peers.

## **ASSISTANT LEADER**

Assistant leaders have the responsibility to support the visit leader on educational visits and must take the lead if the visit leader is unable to take charge. They must also:

- be briefed by the visit leader on their role prior to the visit;
- complete and carry out their role successfully;
- follow the establishment policies and procedures for educational visits;
- participate in the planning process for the visit (including risk management)

## **LEADERS/EMPLOYEES**

In addition to the general responsibilities outlined above, leaders must recognise that they act as employers, whenever the visit takes place.

They have a responsibility for:

- maintaining order and discipline;
- safeguarding the health, well-being and safety of the young people in their care;
- informing the Visit Leader of any relevant incidents affecting, or likely to affect, group members.

## **Educational Visits Co-ordinator**

### **Named teacher in charge of off site/ educational visits**

**Catherine Dowell - Residential visits**

**Ingrid Hines- Lower KS 2, educational visits**

**Jayne Basnett - Upper KS 2, educational visits**

**Amundee Bain - KS 1, educational visits**

**Elizabeth Gallagher - EYFS, educational visits**

The functions of the EVC are to:

- work as delegated on behalf of the Head/LA/Governors;
- support the Heads and Governors with approval decisions;
- ensure the competence of the staff and volunteers to lead or otherwise supervise a visit;
- organise the training of leaders and others going on a visit
- ensure the D.B.S checks are in place as necessary;
- ensure that parental consent or refusal is obtained;
- organise the emergency arrangements and ensure emergency contact for each visit;
- keep records of individual visits including accident/incident/near miss reports;
- review systems and monitor practice;

viii) **Educational Visits Checklist**

See attached notes.

ix) **Risk Assessment**

A risk assessment should be completed for all off-site visits.

The risk assessment should be seen by the EVC for the double year group, Deputy Head Teacher or Head teacher and agreed before the visit takes place. Please submit risk assessments 2 weeks in advance of the visit.

A school Risk Assessment form has been generated but visit leaders will need to ensure the maximum amount of additional information has been included.

Following the visit an evaluation slip should be completed to identify further risks.

#### **L) Planning for emergency procedures**

- In the event of a medical emergency whilst out on site. The visit leader to inform a senior member of staff and head teacher and contact emergency services.
- Ensure that there is a reliable emergency contact at school for each visit who can be contacted and who can access all details of the visit at any time. (24/7 for residential visits)

#### **M) Roles and responsibilities of the Head teacher and Governing body**

##### **THE HEADTEACHER**

The head teacher is responsible for ensuring that Governing Body and LA policy is implemented. Under his / her conditions of employment is a responsibility for ensuring that all activities are properly planned, appropriately supervised and risks assessed by a competent person.

In particular Headteacher must ensure:

- tasks are delegated to EVC as appropriate
- that the visit leader is an appropriately experienced and competent member of staff;
- the suitability, number and competence of all adults accompanying or instructing the party;
- that adequate child protection measures are in place;
- proper and effective support structures in the event of difficulty or emergency, including means of contacting the relevant School Education Officer at the LA;
- notification of the visit to the LA, where required, and that

appropriate insurance cover is in place.

- that visits are evaluated to inform future visits
- all learning outside the classroom, off-site activities and visits comply with employer guidance

### **The Governing Body**

As part of its responsibility for general conduct, each governing body/management group must:

- ensure that a policy exists for the coordination of visits and for their effective and safe management;
- assure itself that appropriate risk assessment procedures are in place;
- ensure a school/centre approval system for visits is in place;
- ensure that the LA is notified of defined adventure activity provision; ( notification form OE 2005 appendix A)
- determine what types of visit require its specific approval.
- determine its procedures for responding to a major emergency;
- have a Charging and Remissions policy.
- make sure that the establishment visit policy supports the principles of inclusion

For further advice please refer to Birmingham City Council outdoor visit and procedures policy is available on staff common area)



# FORM OE 2005

## Section 8

### NOTIFICATION OF ADVENTURE ACTIVITIES

This form should be photocopied or submitted electronically and used for notification of the activities listed in Section 8 (Page 1).

#### USING THIS FORM

All Establishments should:

- Complete Parts 1 & 2 and send to the address overleaf
- Ensure each part is signed by the appropriate person
- Enclose wild country/ D of E routes where applicable
- Complete a checklist for Adventure Activities (Section 8) and retain this on record at your establishment. You do not need to send this checklist to the Local Authority

**This form is not required when you employ Birmingham Outdoor Learning Service Instructors/Tutors or Centres, (unless self-programming with your own staff at our venues).**

#### PART 1 TO BE COMPLETED BY ALL SCHOOLS, CENTRES OR OTHER ESTABLISHMENTS

Name of School/Establishment \_\_\_\_\_

Tel. \_\_\_\_\_

Address \_\_\_\_\_

Date of visit from \_\_\_\_\_ to \_\_\_\_\_ Name of Visit Leader \_\_\_\_\_

Total Young People  
\_\_\_\_\_ Male \_\_\_\_\_ Female \_\_\_\_\_ Age range \_\_\_\_\_

Adventure activities (please list) \_\_\_\_\_

Geographical location, place/address and area, please be specific.

\_\_\_\_\_

## PART 2

Names of all accompanying adults  
(please indicate whether male/female (m/f);  
staff (s); parent (p); governor (g); volunteer (v)

Relevant qualifications/experience


**If the activities are wholly or partly provided by a commercial company or independent organisation, please state:**

Name of Company/Organisation \_\_\_\_\_ Tel \_\_\_\_\_

Company Address \_\_\_\_\_

Address of Where staying/Activity Base \_\_\_\_\_

**Please state the activities, which will be under the direct control of:**

- i) LA employees \_\_\_\_\_  
ii) Hired instructors \_\_\_\_\_

**For teacher/ youth worker-led expeditions into 'wild country',  
Please enclose routes marked on a photocopied map scaled 1:50,000 or 1:25,000**

**Have you completed Adventure Activity Checklist and kept on record at your establishment?** **Yes / No**

Emergency Contact Names 1) \_\_\_\_\_ Tel: \_\_\_\_\_  
2) \_\_\_\_\_ Tel: \_\_\_\_\_

(Representatives of School, Unit or Centre who can be contacted by Leader or LA in an emergency)

I confirm that appropriate insurance has been effected and that adequate emergency procedures are in place

Signed \_\_\_\_\_ (EVC/ Head Teacher/Senior Manager)

Print Full name clearly \_\_\_\_\_ Date \_\_\_\_\_

Please complete this form and send it with your 'wild country' /D of E routes if appropriate.

To The Education Visits Adviser, The Stables OLC, Spirehouse Lane, Blackwell, Bromsgrove B60 1QE. Telephone: 0121 445 3177 Fax: 0121 445 0532  
Contact Person : Tom Lilley E-mail : [stables@boec.bham.org.uk](mailto:stables@boec.bham.org.uk) to arrive at **least four weeks before the proposed visit.**

**Grove School**  
Educational visit information/costing sheet

'APPENDIX B'

Class: .....

No of children: .....

No of adults: .....

Location of visit: .....

Visit date: .....

Total cost (£)

Cost per child entrance: ..... .....

Cost per adult entrance: ..... .....

Cost of insurance: ..... .....

Cost of coach : ..... .....

Total cost: ..... .....

Cost being charged to parents: .....

Subsidy from SRB (£30): .....

Check list:

- |  |        |
|--|--------|
| 1. Has location been booked?   | Yes/No |
| 2. Has coach been booked?  | Yes/No |
| 3. Has letter to parents been sent out?                                    | Yes/No |
| 4. Have parents been informed if packed lunch needed?                      | Yes/No |
| 5. Have kitchen been informed if packed lunch needed?                      | Yes/No |
| 6. Has trip been put in school dairy?                                      | Yes/No |
| 7. Has completed Form OE 2005 for Adventurous activities                   | Yes/No |
| 9. Have Governors been informed (if applicable)?                           | Yes/No |
| 10. Has risk assessment been completed?                                    | Yes/No |
| 11. Has risk assessment been signed by Headteacher?                        | Yes/No |
| 12. Medical forms attached to risk assessment prior to signing?            | Yes/No |
| 13. On day of trip check all staff attending have copy of risk assessment? | Yes/No |

Educational Visits Checklist - For Year Group Leaders

This checklist is an essential part of the risk assessment process and is applicable for all visits.

Title of visit:	Date(s):
-----------------	----------

**The visit should only go ahead if the answer to all applicable questions is 'YES'**

**IN ADVANCE OF THE VISIT**

- 1) Have the educational aims of the visit been clearly identified? Yes
- 2) Is the visit appropriate to the age, ability and aptitude of the group? Yes
- 3) Has there been suitable progression/preparation for pupils prior to the visit? Yes
- 4) Does the visit comply with any guidelines specific to your school? Yes
- 5) If a member of staff is going to lead adventurous activities, is he/she appropriately qualified or experienced? Yes
- 6) Are transport arrangements suitable and satisfactory? Yes / No
- 7) If the visit is residential, have appropriate measures been taken to ensure the suitability of accommodation?  
Form OE 2005 has been completed for adventurous activities Yes / No
- 8) Have you conducted a pre-visit? Yes
- 9) Do the adults in the party have the appropriate skills for the visit? (Check this carefully and arrange suitable training and/or briefing to clarify your expectations) Yes
- 10) Have any adult helpers (non-teachers) been approved by the Headteacher as to their suitability? Yes / No

11)	Is the level of staffing sufficient for there to be adequate supervision at all times?	Yes
12)	Are all members of staff and helpers aware of their role?	Yes
13)	Has VAGRA been carried out (Venue/Activity/Group specific Risk Assessment) and this will be shared with all relevant parties?	Yes
14)	Does at least one member of teaching staff know the pupils that are being taken away, including any behavioural traits?	Yes
15)	Have pupils been advised in advance about expectations for their behaviour? If appropriate, are pupils aware of any 'rules', and have sanctions to curb unacceptable behaviour been identified and agreed with pupils and staff?	Yes
16)	Are pupils aware of the nature and purpose of the visit?	Yes
17)	Are parents fully aware of the nature and purpose of the visit, including contingency plans, and has written consent been obtained?	Yes
18)	Have all relevant details been issued? (e.g. itinerary, kit lists, etc?)	Yes / N/A
19)	Are staff aware of any medical needs and/or other relevant details of pupils?	Yes
20)	Are staff aware of any relevant medical conditions of other staff/helpers within the group?	Yes / N/A
21)	Does at least one member of staff have a 'good working knowledge' of First Aid?	Yes
22)	Is a first aid kit (appropriate to the visit) available?	Yes
23)	Has the suitability and safety of transport been considered?	Yes
24)	Is there flexibility within the programme? Are there contingency plans that would be suitable in the event of changed or changing conditions, staff illness, etc e.g. Plan B and have these plans been risk assessed?	Yes
25)	Are staff aware of the appropriate action to be taken in the event of an accident, incident or emergency?	Yes
26)	Is a weather forecast and/or other local	Yes / N/A

information necessary, and are staff able to access this information and act upon it appropriate if necessary?

- |     |  |           |
|-----|--|-----------|
| 27) | A mobile phone is recommended for all visits. Are you aware of the reception in the area you are visit?                                      | Yes / N/A |
| 28) | Will the group need waterproof clothing, boots or other equipment? If so, are procedures in place for checking the suitability of equipment? | Yes / N/A |
| 29) | Has the visit been approved by the Headteacher and where appropriate, the Governing Body?  | Yes       |

#### **DURING THE VISIT**

- |     |  |           |
|-----|--|-----------|
| 30) | Do all staff have a list of pupils/groups? (+ emergency contact details if out of school hours)  | Yes       |
| 31) | Does the school office have a list of names of all participants, including adults? (+ contact details if out of school hours)                                  | Yes       |
| 32) | Do staff have sufficient funds to allow for any contingencies?   | Yes / N/A |
| 33) | Do staff have any relevant literature, work sheets, clipboards, etc?   | Yes / N/A |
| 34) | Do staff have other items e.g. first aid kits + sick bags, litter sack, etc if needed?   | Yes       |
| 35) | Are pupil numbers being checked at appropriate times?  | Yes       |
| 36) | Has the group been warned of potential hazards in advance? If necessary, have specific arrangements been made to supervise these areas particularly carefully? | Yes / N/A |
| 37) | Has a clear recall system been arranged if the group is working away from you? Do pupils understand this and will they be able to respond effectively?         | Yes / N/A |
| 38) | If a rendezvous for the group has been arranged after a period of time, does each pupils and member of staff know exactly where and when to meet?              | Yes / N/A |
| 39) | Do pupils know what action they should take if they become separated from the group?   | Yes       |
| 40) | Is on-going risk assessment being conducted, and the programme adapted if necessary to suitable changed or changing circumstances?                             | Yes       |

## Appendix E

Grove School

### Educational Visit Evaluation Sheet

Key:

Very Good

Good

Requires  
improvement

Inadequate

1

2

3

4

Education visit to:.....

Year Group: .....

1. Quality of learning on the visit: 1                      2                      3                      4

2. Recommendations for changes to the organisation of the visit:

.....  
.....

3. Changes to be made to the visit risk assessment:

.....  
.....

4. Any first aid administered and recorded on the visit:

.....  
.....

Signed: .....Visit leader

Date: .....

Action needed by EVC:                      Yes                      No

Action taken by EVC: .....

.....