



BASSENTHWAITE SCHOOL

HEALTH & SAFETY POLICY - PART 3

OFF SITE VISITS PROCEDURES

Approved by	
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REVIEW SHEET

The information in the table below details earlier versions of this document with a brief description of each review and how to distinguish amendments made since the previous version date (if any).

Version Number	Version Description	Date of Revision
1	Original	
2	Removed 24hr emergency arrangements from Governor role. Changed some wording about contracts in Head's role. Clarified national expectation EVCs will arrange staff visits training. Clarified under 18s do not count in supervision ratios even if they have simple supervisory tasks in Volunteer role. New section on safeguarding with clarification on DBS, volunteers, driving and exchange visits. New section explaining Duty of Care clarified re: third parties. New section on overseas and specialist activities. Updated guidance on transport and licences. Appendices removed: Form A, E, example generic risk assessment for All Visits. New appendices: vetting, exchanges, code of conduct, Provider Risk Management Statement Form and Driver Declaration Form.	July 2015
3	Major revisions throughout to halve the content but improve clarity and better signpost to staff to extensive guidance that they should read parts of before ever contemplating running a trip and dip in and out of the rest as the need arises.	December 2018
4	Updated to better reflect good practice in the management of data protection, data sharing, consent and dispute issues (section 3.3); and planning visits potentially affected by terrorism (section 10). (Blue highlighting)	September 2019
5	Minor updates. Minor wording alterations, updated links, more information on the law under consent, removal of all reference to any guideline ratios of adults to children in line with OEAP National Guidance, 2 starting sentences and a guidance note on outlining emergency procedures. (Green highlighting)	November 2019
6	Links updated	May 2021
7	Minor updates throughout regarding some significant updates to OEAP guidance and what people holding different roles in visits management need to be aware of. Updates will affect visit leaders' practical planning more significantly than they affect setting Policy. Key areas of updates: Managing emergencies, and Visits evaluation & monitoring	September 2022
8	New section on contracts, waivers, disclaimers. New introduction to the STAGER one-sheet risk assessment approach. Updated to provide more clear descriptions of roles in relation to the new Hub and the role of Visits Administrator. Links are both updated and highlighted in the body of model procedural text to signify staff should click on them to refresh and update their knowledge. The same links are not updated or highlighted in boxed guidance text meant for authors that should be deleted before issue.	September 2023

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1. Introduction

In preparing to write a set of visits procedures, read [Health and Safety on Educational Visits](#) (HM Government guidance to schools on how they should approach the management of educational visits) and OEAP documents [1b: Foundations](#); [1c: Status Remit and Rationale](#); [5.1b: High Quality Outdoor Learning Publication](#); [5.3a: Writing policies to reduce bureaucracy for routine off-site activities and visits](#); [5.3b: How to write an establishment visit policy](#); any document in section 2 of the [OEAP library](#); and [4.3a: Good practice basics](#).

Describe why you provide visits and the part they play in setting life. Define any terms you use and refer to your underpinning philosophy and the benefits and outcomes anticipated.

Explain the scope of these procedures and define the activities they apply to i.e. who should follow them and what activities they cover. If, you operate on multiple sites, make clear that these procedures do not apply to young people engaging in activities on another of your sites different from their usual base.

For example:

Bassenthwaite School recognises the positive outcomes associated with Learning outside the Classroom (LOTc) and believes that every young person should experience this essential part of learning and personal development, whatever their age, ability or circumstances.

LOTc to be governed by these procedures is defined as: “any occasion where young people engage in activities beyond the boundaries of this **educational** setting”.

Our rationale is that such learning often makes the most memorable learning experiences and helps young people make sense of the world by linking feelings and learning. These experiences stay with them into adulthood and affect behaviour, lifestyle and work. They influence their values and the decisions they make and develop an individual’s ability to transfer skills from outside to the classroom and vice versa.

1.1 Aims

When we provide learning outside the classroom, our intended outcomes seek to ensure that our pupils:

1. enjoy participating and reflecting in outdoor activities and adopt a positive attitude to challenge and adventure;
2. are enhancing their overall well-being by gaining personal confidence and developing character and resilience through taking on challenges, experiencing valuable failures, and achieving success;
3. are developing their self-awareness and social skills, and their appreciation of the contributions and achievements of themselves and of others;
4. are becoming alive to the natural local and global environment and understand the importance of conservation and sustainable development;
5. are acquiring and developing a range of skills in outdoor activities, fieldwork, exploration, journeys and expeditions;
6. are demonstrating increased initiative and innovation, enthusiasm, curiosity, self-reliance, responsibility, perseverance, tenacity and commitment;
7. are developing and extending their key skills of communication, problem-solving, creativity, critical thinking, leadership and co-operation;
8. are learning to appreciate the benefits of physical activity and the lifelong value of participation in healthy leisure activities and reflection;
9. are displaying an increased motivation and appetite for self-directed learning that is contributing to raised levels of attainment in other aspects of their development, as well as becoming concerned, responsible and fulfilled citizens;
10. are broadening their horizons and becoming open to a wider range of employment opportunities and life chances.

Giving young people responsibility for achieving these outcomes helps them to learn from their successes and failures.

1.2 Scope

We have formally adopted the Outdoor Education Advisers' Panel "National Guidance" (NG) available at www.oeapng.info. Links to specific guidance documents on the OEAP website will appear throughout these procedures. **These documents are essential to the proper understanding and implementation of our procedures and all employees and volunteers acting on our behalf are expected to refer to them and follow their requirements and recommendations when planning and leading LOTc off site.** Hold down 'control' on the keyboard and click on any word or phrase underlined in blue text to download the relevant guidance document or to jump to a particular section of these procedures. For this reason, these procedures should never be printed in hard copy and users should only review them on an internet-enabled device with access to the OEAP website.

Any further clarifications of employer expectations which are necessary will be outlined in these procedures or can be sought from **Sara Royle – Head / Educational Visits Coordinator**.

There are two categories of off-site visit, each with different procedures outlined in section 3.

Category 1 visits are broadly defined as day or evening activities that are relatively simple in the complexity of staffing requirements, **timings**, activities, group **characteristics**, environment, and **are within easy reach of support**. Category 1 visits and their leaders are vetted internally and require approval from **Sara Royle – Head / Educational Visits Coordinator** as a minimum.

Category 2 **There are two categories of off-site visit, each with different procedures outlined in section 3.**

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Physical Education, School Sports and Physical Activities (PESSPA) such as curricular swimming, sporting tournaments etc. are governed by these procedures only in respect of the journey to and from an off-site venue unless it involves an overnight stay. Conduct of PE activities is otherwise governed by the PE Department's Code of Practice; activity risk assessments and any current guidance from any relevant sporting National Governing Body or the Association for Physical Education (AfPE).

Work experience activities as defined in the publication 'Work Experience: a guide for secondary schools' (DfES 2002) are not governed by these procedures.

To ensure best value and quality assurance in all learning outside the classroom, **identifying the** benefits and learning outcomes is embedded in the visit planning process. Targeted learning outcomes are recorded and communicated appropriately to everyone involved including parents in pre-visit information and visits are reviewed and rigorously evaluated within a framework of safety and quality.

2 Roles and Responsibilities

2.1 The employer

Read OEAP documents [3.2a: Underpinning Legal Framework and Duty of Care](#) (outlines legal responsibilities); [3.1a: Requirements and Recommendations for Employers](#) (outlines employer responsibilities); [3.4f: Member of a Management Board or Governing Body](#) (outlines governor responsibilities); [3.3c: Management Board and Governor Check List](#) (outlines what governors can do to be effective); [5.1c: Learning outside and off-site visits: self-evaluation using the Ofsted framework](#) (guidance on assessing school performance); and [5.1a: Establishment Self Evaluation form](#) (a performance monitoring form governors can complete/review annually).

Begin by stating who the employer is e.g. the governing body, the board of trustees etc. and write the briefest of statements or lists outlining the role of governors.

For example:

Our governing body is the employer and our critical friend, and they are responsible for ensuring:

- they understand their role and responsibilities as set out in OEAP documents [3.2a Underpinning Legal Framework and Duty of Care](#) (legal responsibilities) [3.1a Requirements and Recommendations for Employers](#) (employer responsibilities); [3.4f Member of a Management Board or Governing Body](#) (governor responsibilities), [3.3c Checklist – Management Board/Governing Body](#) (action to take to be effective), and other relevant guidance these documents refer to;
- there is a systematic approach to assessing and approving visit proposals: we have written procedures and use www.kymallanhub.co.uk (see [Section 3](#) Procedures below); and
- there is a systematic approach to performance monitoring and evaluation of the effectiveness of the LOTC we provide, including a performance assessment/review at least annually using [5.1b Establishment Self Evaluation Form](#) in line with the guidance in [5.1c Self-evaluation and the Ofsted framework](#) (see [section 15](#) Visits Evaluation and Monitoring below).

Our governing body has delegated the task of approving all visits to the Head teacher, except for Category 2 visits overseas and Category 2 adventure activities led by our own employees or volunteers when either is being undertaken for the first time ever. These visits must be notified to a full governors meeting 8 weeks prior to the visit with all the information governors will need to decide whether they approve of proposals. This is likely to include advice from KAHSC which cannot be sought less than one week before the governors' deadline.

2.2 The Head teacher or Manager

Read OEAP documents [3.4g: Head Teachers/Managers](#) (outlines responsibilities) and [3.3b: Head or Manager Check List](#) (outlines what Head teachers can do to be effective).

If the Head teacher is both the Visit Approver and EVC, read [Section 2.3](#) and merge the two roles as simply as you can.

The responsibility for ensuring that policies and procedures are adhered to is implicit in the job description of a Head teacher, so outline what they are actively responsible for and what they need to do to carry out their functions.

For example:

Our Head teacher/Manager, [Sara Royle], is responsible for ensuring that they understand and fulfil their role and responsibilities in law; as a governor (described in Section 2.1 above); and as set out in OEAP documents [3.4g Head Teacher/Manager](#) (Head teacher responsibilities), [3.3b Checklist - Head Teacher or Manager](#) (what Head teachers can do to be effective), and other relevant guidance documents they refer to.

More specifically the Head teacher will take steps to ensure that:

- the general visits principles and arrangements outlined in Checklist 3.3b apply to the LOTC we provide.
- our procedures clearly set out how visits should be planned and managed to address the responsibilities they hold outlined in document 3.4g, for example, expectations of leader competence, employer requirements when choosing contractors, visit evaluation requirements etc.
- all LOTC complies with these procedures and any relevant OEAP good practice guidance by logging into kymallanhub.co.uk to give all visits the final review (in line with the Visit/Activity Specific section of Checklist 3.3b) and their online; and

where charges are made to parents, they comply with our Charging & Remissions Policy, and procedures are in place to account for the finances of visits (see [Finance](#) below). Our policy is available to staff and published to parents through the school website

2.3 The Educational Visits Coordinator

Read OEAP documents [3.4j: Educational Visits Coordinator \(EVC\)](#) (outlines key requirements and responsibilities) and [3.3a: EVC check list](#) (outlines what EVCs can do to be effective).

Outline what the EVC is **actively** responsible for and what they need to **do** to carry out their functions (or merge with the role of Head teacher/manager if your Visit Approver and EVC are the same person).

If your EVC does not adequately fulfil the criteria for selection outlined in 3.4j, remember to briefly describe the structured support available to them and name any other staff involved.

For example:

Our EVC, [\[Sara Royle\]](#), was selected using the criteria outlined in OEAP document [3.4j Educational Visits Coordinator \(EVC\)](#). They are responsible for ensuring that they understand and fulfil their role and responsibilities as set out in OEAP document 3.4j (EVC key requirements and responsibilities) and [3.3a Checklist - EVC](#) (what EVCs can do to be effective), and other relevant guidance documents they refer to.

More specifically the EVC will take steps to ensure that:

- the general visits principles and arrangements outlined in Checklist 3.3a apply to the LOTC we provide.
- all LOTC complies with these procedures by logging into [kymallanhub.co.uk](#) and reviewing the visits submitted by visit leaders (in line with the Visit/Activity Specific section of Checklist 3.3a), before applying for final approval online from [the Category 1 Visits Approver](#), or requesting [technical](#) advice online [for Category 2 visits](#) from KAHSC .
- they champion LOTC and challenge colleagues to use visits effectively to provide a wide range of pupil outcomes, contributing to our overall effectiveness.
- they support/oversee visits planning by providing clarification to visit leaders and by monitoring things like how appropriately helpers are being used, the early resolution of specific issues like managing SEND, obtaining Enhanced DBS Disclosures, access issues etc.;
- they mentor leaders and aspirant leaders, contribute to assessment of their competence, support their ongoing development, sample monitor their activities to identify any further training needs, and ensure succession planning begins as soon as notice is received that a key member of staff is leaving; and
- they provide regular updates to governors about LOTC [\[in Headteacher reports\]](#) and contribute to the annual performance assessment/review of the effectiveness of our LOTC.

2.4 Visit leaders

Read OEAP documents [3.4k: Visit or Activity Leader](#) (outlines key requirements and responsibilities) and [3.3e: Visit Leader Check List](#) (outlines what visit leaders can do to be effective). Look at the scope of sections 4, 6 & 7 of the [OEAP Library](#).

Outline how visit leaders are selected, what they are **actively** responsible for, and what they need to **do** to carry out their functions.

For example:

Our leaders are selected using the key requirements and responsibilities criteria outlined in OEAP document [3.4k Visit or Activity Leader](#). They are each responsible for ensuring that they understand and fulfil their role and responsibilities as set out in 3.4k (providing evidence as necessary) and [3.3e Checklist - Visit Planning](#) which outlines what they can do to be effective.

All leaders are expected to have an understanding of and use for reference as necessary the OEAP guidance in sections 4, 6 & 7 of the [OEAP Library](#). For more information about specific leader competence assurance procedures for higher risk undertakings like adventure activities, see [Induction, Training, Apprenticeship and Succession Planning](#) below.

Visit leaders must:

- ensure their activities comply with these procedures i.e. by logging into www.kymallanhub.co.uk and inputting enough data and uploading enough supporting information which adequately outlines visit arrangements **before** carefully reviewing their visit (in line with the relevant parts of Checklist 3.3e), **and then** applying for approval online from the EVC **no less than 14 days for Category 1 trips and 6 weeks for Category 2 trips**];
- ensure, **if necessary**, that any final amendments like last minute medical updates or attendee lists, are given to **the online** visits administrator for approved entry or upload online before departure.
- show in their planning appropriate due diligence (reasonable investigation – into the needs of the group, **quality of** third-party providers etc.) and a clear understanding that the overarching duty of care for pupils remains with us, even when responsibility is shared with an activity provider who is leading i.e., clear handovers, briefings to consider stopping an activity at the first appropriate moment if concerned etc.
- evaluate all aspects of a visit, both during and after the event, and contribute to the annual performance assessment/review of LOtC; and
- record and report all accidents and near-miss incidents in accordance with [Accident/incident recording and reporting](#) below and RIDDOR (the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations, 2013) i.e. to the appropriate employer.

2.5 Assistant visit leaders

Read OEAP document [3.4l: Assistant Leader](#) (outlines key requirements and responsibilities).

Outline what an assistant visit leader is **actively** responsible for and what they need to **do** to carry out their functions.

For example:

While we have not made it a blanket requirement for all off-site activities, where possible, a visit will have an assistant leader who is sufficiently competent, resourced, and briefed to take over from the visit leader in an emergency.

Our assistant visit leaders are selected using the criteria outlined in OEAP document [3.4L Assistant Leader](#).

Assistant visit leaders must:

- **Be competent and confident to take over a visit and** suitably fulfil the **'typical expectations'** outlined in OEAP document 3.4l (as applicable to their activities) and as agreed with the EVC (providing evidence if required).
- be **meaningfully** involved in planning and preparation for the visit, including contributing to the risk management plans.
- ensure they understand their role & responsibilities, **relevant policies & procedures**, needs of the group, nature & location of activities, and how to work alongside other staff and the visit or activity leader.
- contribute to ongoing **monitoring during** and evaluation **after** the event.

2.6 Helpers

Read OEAP document [3.4m: Helpers](#) (outlines key requirements and responsibilities).

Outline the role of helpers and your requirements of visit leaders who use them.

For example:

A helper is an adult who has an agreed role during a visit, but who is not a visit leader, assistant leader, activity leader, or participant. For example, a helper might be an inexperienced member of staff; a parent or carer; an apprentice, student, or trainee, or **someone supporting the visit leadership team with their expertise, but not taking a leadership role (e.g., a driver or a local historian)**. When our risk assessments

talk about “supervisors”, they might be experienced members of staff leading subgroups, or they might be helpers who more often supervise groups alongside an experienced member of staff.

Any child (aged 15 and under) or young person (aged 16 or 17) in a helping role will **not** be regarded as a supervisor in the supervision ratio count.

All helpers will be subject to a recruitment and vetting process proportionate to what they are being asked to do. If it involves activity leadership this might include providing evidence of qualifications and undertaking an Enhanced DBS Disclosure for Regulated Activity in line with our expectations of employees. For more information see [section 4](#) Vetting and Safeguarding below.

The minimum requirement is that they are competent and confident in what they are being asked to do, and that they understand our policies and procedures insofar as they affect what we are asking them to do.

Leaders must ensure that helpers who do not have an Enhanced DBS will **never** be left in sole charge of pupils or asked to carry out sensitive supervision such as giving prompts or physical help to pupils to eat, toilet, dress, wash etc. Arrangements will also ensure that inexperienced helpers will be accompanied by experienced helpers or staff.

Helpers will be given access to a copy of OEAP document [3.4m: Helper](#), and the leader must ensure they:

- are briefed appropriately about, the pupils (including age, health, capabilities, special needs, safeguarding & behavioural issues) and the nature and location of the activity;
- can report concerns during a visit to the visit leader or assistant leader as soon as possible.
- understand that any role assigning leadership with direct responsibility for their own child is avoided for good practice reasons unless otherwise agreed for sound risk management reasons e.g. the child’s age, maturity, or SEND; and
- contribute to the evaluation of the event.

2.7 Pupils

Read OEAP document [3.3f: Young People Check List](#) (outlines key information children and young people need before they go on a visit) and [8i: Model Code of Conduct](#).

Outline your expectations of young people and any specific action leaders need to take.

For example:

Our [Behaviour](#) Policy and Codes of Conduct apply to all off site visits and will be suitably reinforced before every departure and during visits. Sometimes, event specific additions might be made to the Code, but expected conduct, rewards and sanctions will be made clear to everyone involved.

When planning visits leaders will:

- consider SEND, medical, behavioural and other significant risk management issues at the earliest stage of planning and in consultation with the relevant specialists if necessary;
- ensure any pre-conditions placed on a pupil’s participation, such as suitable health or behaviour, are in line with our policies and are properly communicated to and agreed with the pupil (where possible), parents and anyone else relevant to decision-making **before** any deposit that is not fully refundable is paid;
- involve young people in the risk management process in ways appropriate to their age, ability and level of understanding e.g. (nursery children roleplaying how they can “be safe” before going on a walk to the park, or John Muir Award participants writing their own risk assessment for camping); and
- before going on the visit, provide pupils with all the information they would need to be able to complete OEAP document [3.3f Checklist - Young Person](#) (outlines the key information they should have) [and any personalised version we have created of 8.1i Model Code of Conduct](#).

Any child (aged 15 and under) or young person (aged 16 or 17) in a helping role (see [Section 2.6](#) above) is to be regarded as a pupil in the supervision ratio count and **not** as a supervisor.

2.8 Parents or those with parental authority

Read OEAP document [3.1c Corporate Parenting](#) (which explains the Local Authority role for children who are looked after), [3.4n Guidance for Parents](#) (aimed at parents explaining what 'informed consent' means and the minimum mutual expectations parents and any organisation should have of each other when arranging off-site visits) and [3.3d Checklist - Parent or Guardian](#) (outlines key information parents need before their children go on a visit).

Outline what those with parental authority can expect from you and vice versa including any specific action leaders need to take.

For example:

In written communications and face-to-face meetings where appropriate, parents can expect us to:

- provide clear information about:
 - what a visit involves so their consent can be properly informed.
 - any pre-visit preparation they need to take an active role in e.g., ensuring their child meets any pre-conditions for attendance and understands behavioural expectations and sanctions.
 - data protection and privacy information when sharing personal data with third party providers.
 - arrangements for sending a pupil home early (when there has been serious failure to meet the required standards of behaviour) or collecting a pupil before the end of a visit (when they have become ill or injured) and how any costs will be met.
- Ask for:
 - emergency contact numbers, where an appropriate adult can be contacted 24/7 during the period of the visit.
 - detailed personal information about a pupil to help us manage their wellbeing e.g., physical and mental health, medicines (incl. dosage and who may administer it), allergies, dietary or religious requirements, recent injury or infectious illness, sleepwalking, bedwetting, water confidence and swimming ability, phobias etc.
 - specific consent regarding any proposed filming or photography.
 - specific consent for a pupil to receive emergency medical treatment, including an anaesthetic or blood transfusion.
 - cooperation in only making indirect contact with their child if there is a home emergency (normally through a nominated Emergency Base Contact's telephone number provided to parents).

This information should include (where relevant):

- | | |
|---|--|
| <ul style="list-style-type: none">• The educational reasons for the visit• Details of the destination(s) and, for long journeys, how parents will know pupils arrived safely.• Date(s) of the visit.• Times of departure and return.• Location(s) where pupils will be collected from and returned to.• Mode(s) of transport and the name of any travel company used.• Size of the group.• The visit leader's name and supervision arrangements, especially what remote supervision is and how it works. | <ul style="list-style-type: none">• Arrangements when a pupil becomes ill or must return home for any reason.• Pupils' responsibilities for their own health, safety, wellbeing, and behaviour.• The code of conduct and sanctions.• Guidance on the use of mobile phones and other devices.• The full range of planned activities.• Clothing and equipment requirements.• Insurance arrangements.• Pocket money recommendations.• Costs, and payment & cancellation terms.• Emergency contact details, including how you can contact your child or the visit |
|---|--|

- Accommodation details if overnight. leaders during the visit.
- Arrangements for providing for SEND.

If the visit is overseas, parents can additionally expect to be given information about:

- Documentation required (passport, visa, consent to travel overseas, and in some cases evidence of the child's right to reside in the UK)
- The need to obtain a valid EHIC/GHIC and what the travel insurance covers.
- The need to disclose full information about a pupil's physical and emotional wellbeing or mental health that may affect them during the visit, of any medicines they need to travel with and what will happen if there is an emergency overseas e.g., a pupil becomes ill or injured.
- Any aspects of the visit where health and safety risks are greater than in the UK and relevant customs restrictions e.g., on carrying meat & dairy products out of or into the UK.
- Expectations about downtime, curfews, bedtimes, alcohol, smoking etc.
- Their responsibility to check roaming charges abroad with their mobile phone providers.
- Expectations arising from legal or cultural differences, such as traffic laws, dress, and behaviour.
- Foreign language learning expectations.

OEAP documents [3.4n Guidance for Parents](#) (explaining what 'informed consent' means and the minimum mutual expectations parents and organisations should have of each other when arranging off-site visits) and [3.3d Checklist - Parent or Guardian](#) (which outlines key information parents need before their children go on a visit) can be made available to parents and carers if the EVC or a visit leader thinks they would be helpful, but well written letters by us about each trip are just as important. For more information about communication with parents and consent see [section 3](#) Procedures below.

When a looked after child is part of our community, we will have a written agreement between the carer(s) (foster carers), and the legal parent or guardian (a Local Authority acting as a Corporate Parent), about the extent to which a carer can make decisions about visits or give consent for activities. It will make special reference to any limitations e.g., whether they can travel abroad, participate in adventure activities, or need to avoid specific geographical locations.

Our aim is to treat looked after children as much like any other pupil as we can and our Designated Teacher for looked after children and previously looked-after will lead on this. We also aim to treat their carers as much like any other family in our community as we can and will provide suitable information and support to try to achieve this.

3 Visits Procedures

Read OEAP documents: [9a: The Radar Introduction](#) (not yet updated with the S.T.A.G.E.R. approach but still useful - describes the boundaries of activities that are best covered by policy and procedures, and those that require enhanced planning and event specific risk assessment and procedures; [3.2f: AALA Licensing](#) (guide to the law); [3.2h Visits and the Package Travel Regulations](#) (guide to the law and good practice arrangements), [4.1a Avoiding Accidents and Emergencies](#) (outlines good leadership habits and lessons learned from accidents, with some useful pointers on preventing and managing them), and [4.2b: Residential](#) (a good practice guide), where applicable to their visit.

Outline step-by-step the process visit leaders need to follow to appropriately plan off-site activities and get them approved.

For example:

All visit leaders are expected to plan off-site activities in line with these procedures and the principles in OEAP document [9a: The Radar Introduction](#) (describes the boundaries of activities that are best covered by policy and procedures, and those that require enhanced planning and event specific risk assessment and procedures) but using the updated STAGER not the SAGED approach.

They must also, **where applicable to their visit**, have an understanding of and/or use for reference OEAP guidance documents: **3.2f: AALA Licensing** (a good practice outline); **3.2h Visits and the Package Travel Regulations** (guide to the law and good practice arrangements). **4.1a Avoiding Accidents and Emergencies** (outlines good leadership habits and lessons learned from accidents, with some useful pointers on preventing and managing them), and **4.2b: Residential** (a good practice guide).

3.1 Obtaining approval for Category 1 visits

This category of visits and their leaders are vetted internally and require final approval from **[Sara Royle]**.

Types of activities we class as Category 1 include:

- regular or one-off activities like swimming in leisure pools open to the general public; visits to shops, churches, museums, parks, other schools, offices, theatres etc. regardless of the presence of water or whether they extend or begin beyond the normal school day.
- walking in parks, other public places or non-remote country paths (<300m above sea level **and** <1km from a road) regardless of the presence of water.
- field studies in environments presenting no technical hazards e.g. pond dipping, river dipping, bug hunting, pedestrian or traffic surveys.
- forest or conservation-based programmes regardless of the presence of water.
- day visits further afield to places like Newcastle, Manchester, and London.
- non-adventure sporting activities **not** involving an overnight stay e.g. netball, football, cricket, water polo matches, swimming galas.

Visit Leaders must:

1. get approval in principle at the very outset of planning by either entering enough detail online and submitting an outline proposal to the EVC and having it returned with a note advising of in-principle approval, or by discussing it directly and receiving verbal approval to begin planning.

No visit arrangements may be made unless the outline proposal adequately addresses timetabling, finance, staffing, cover and provider quality assurance issues, or there is a clear plan to resolve them before any commitments are made.

2. identify benefits and learning outcomes and seek any third-party provider assurances.
3. begin the formal approval process by updating the outline proposal online that was returned to them with the note of in-principle approval (or by creating a new draft visit online if in-principle approval was given verbally) and entering data and uploading supporting information like the letter home, itinerary, kit list, code of conduct etc. as and when it becomes available or confirmed.
4. review generic procedures for managing emergencies and the applicable generic risk assessments considering the activities, locations, and needs of the group. Experienced visit or activity leaders are **not** expected to carry out a specific written risk assessment for Category 1 visits unless there is something exceptional about the activity, location or pupils. For more information about risk assessment requirements see **Risk Benefit Analysis and Risk Management** below. Inexperienced leaders will be mentored through this process which might include needing to evidence their visit specific risk management plans in a written risk assessment for the first few visits they lead.
5. give parents enough information about the visit for consent to be properly informed using approved letter templates (and offer them the opportunity to **give/withdraw** their consent, if the visit is outside normal school hours).
6. carefully review their final visit proposal (in line with these procedures and relevant parts of OEAP document **3.3e Checklist - Visit Planning**) and submit it for EVC approval online **no later than [14 days prior to visit]**. If the visit is returned by the EVC for further action, visit leaders should edit and update the visit and re-submit it online as soon as possible.
7. collate and distribute as necessary all visit emergency information e.g. medical conditions, special needs, behaviour, Emergency Action Cards, panic cards etc. **no later than [2 days prior to departure]**.

This includes ensuring any last-minute updates are added online by the EVC or an online Visits Administrator.

8. finalise 'checking out' and 'checking in' procedures for before, during and after a visit.
9. evaluate the visit soon after return involving staff, volunteers, and pupils as well where possible (for information on how see [section 15](#) Visits Evaluation and Monitoring below).

3.2 Obtaining approval for Category 2 visits

This category of visits includes those upwards on the Y axis and/or to the right on the X axis on the OEAP Radar Graph indicating that enhanced planning with event specific risk management is required, or that activities require detailed planning to reflect challenging environments, locations, higher perceived risk activities etc. or to reflect more complex pupil needs, leader competency requirements etc.

Types of activities we class as Category 2 include:

Any overnight stay	Any visit outside the UK	Abseiling
Any adventurous activity including those led by an external provider	All activities in open country (>300m above sea level and >1km from a road)	All activities on the sea (excluding commercial or public transport e.g., ferry)
All air activities (excluding commercial UK internal flights)	All coastal activities where the tide is a hazard	Coasteering, coastal scrambling and Tyrolean/sea level traversing
All forms of boating (excluding commercial transport e.g., steamer, launch, Thames tour, canal cruise)	Caving, potholing, mining & underground exploration (except open public guided tours with no special equipment required)	Extreme / "thrill-seeking" sports e.g., parkour, skateboarding, zorbing, etc.
Camping	High level ropes course	Horse riding
Motor sports – all forms	Powered safety/rescue crafts	Shooting and archery
Mountain walking (>600m above sea level & >2km from a road)	Rock climbing (including indoor climbing walls)	Road cycling, trail cycling or mountain biking
Multi activities (adventurous including those led by an external provider)	Trampoline/inflatables/assault/similar adventure or challenge parks or events	Canoeing, kayaking, & Stand Up Paddleboarding (SUP)
River/gorge/ghyll walk/scramble	Snorkel and aqualung activities	Water skiing or wave skiing
Sailing, sailboarding, surfing, windsurfing and kite surfing	Skiing/snowboarding outdoors, indoors or on artificial slopes	Swimming (except in UK pools open to the general public)

Visit Leaders must:

1. get approval in principle at the very outset of planning by either entering enough detail online and submitting an outline proposal to the EVC and having it returned with a note advising of in-principle approval, or by discussing it directly and receiving verbal approval to begin planning.

No visit arrangements may be made unless the outline proposal adequately addresses timetabling, finance, staffing, cover and provider quality assurance issues, or there is a clear plan to resolve them before any commitments are made.

2. identify benefits and learning outcomes and seek any third-party provider assurances.
3. begin the formal approval process by updating the outline proposal that was returned to them online with the note of in-principle approval (or by creating a new draft visit online if in-principle approval was given verbally) and uploading evidence that parental consent is fully informed and risks are being suitably managed e.g., letters home, itinerary, kit list, code of conduct etc. when available

4. review generic procedures for managing emergencies and the applicable generic risk assessments considering the activities, locations, and needs of the group, and make visit specific plans.

All category 2 visits require visit specific written risk assessments to be uploaded to the Custom Risk Assessment Tab on the risk assessment page of an online record, and some may also require a specific written emergency plan for the group or an individual.

We expect the competent activity leader to be the named assessor on any risk assessment specifically relevant to an activity they are leading, even when they are not the overall visit leader. For example, **if a member of staff were a** BOF qualified orienteering coach, **they** will assess the risks of the orienteering element of the residential because they are specifically competent to in a way the visit leader is not.

In limited circumstances, the EVC may instruct a visit leader that specific written risk assessment of the journeys involved, such as on a day trip to an adventure centre, is **not** required because the journey is simple and directly comparable with journeys undertaken for Category 1 visits where written risk assessment is not required. This is unlikely to ever apply to an overnight or highly equipped visit where the quantity of luggage or equipment carried will raise journey risks unless specially considered and managed.

5. give parents enough information about the visit for consent to be properly informed using approved letter templates and offer them the opportunity to **give/withdraw** their consent.
6. carefully review their final visit proposal (in line with these procedures and relevant parts of OEAP document **3.3e Checklist - Visit Planning**) and submit it for EVC approval online **no later than [3 weeks prior to visit]**. If the visit is returned by the EVC for further action, visit leaders should edit and update the visit and re-submit it online as soon as possible.
7. collate and distribute as necessary all visit emergency information e.g. medical conditions, special needs, behaviour, Emergency Action Cards, panic cards etc. **no later than [2 days prior to departure]**. This includes ensuring any last-minute updates are added online by the **Visits Approver** or an online Visits Administrator.
8. finalise 'checking out' and 'checking in' procedures for before, during and after a visit.
9. evaluate the visit soon after return involving staff, volunteers, and pupils as well where possible (for information on how see **section 15** Visits Evaluation and Monitoring below).

When we arrange joint Category 1 or Category 2 visits with other schools, **even if we have the same employer [remove if you are not a MAT or LA school], visit leaders must have due regard for guidance in **4.4o Joint Visits and Partnership Working** and ensure that this school has written agreements about our understanding of our separate and shared responsibilities.**

3.3 Communication and consent

Read OEAP document **3.4n: Guidance for Parents** (which explains to parents what 'informed consent' means) and document **3.2i Contracts and Waivers**.

Outline how you establish and maintain informed parental consent and your minimum expectations of communications with parents.

For example:

We need parental consent to take nursery and reception age children off-site before each visit or programme of visits. This is because the education legislation that says we don't need consent only governs the education of children who have already reached the compulsory school age of 5 (s29 of the Education Act 2002). We send information home via **Parentmail** describing the **visit/visits programme** and ask parents to apply their consent and make payment where applicable online. We are sensitive to families with online access issues, or who are unable to use online payment methods and we have alternative and discreet arrangements where we will supply letters with a consent slip and can accept cash and cheques.

We don't need parental consent to take pupils of statutory school age off-site on visits which we use to deliver any element of the national curriculum when it happens entirely within normal school hours. We should still tell parents what we are planning to do because they have a parental right to withdraw their child from school for that particular activity.

We need parental consent to take pupils off-site on visits which extend beyond normal school hours, are adventurous, or are overnight.

When we seek specific consent confirmation for adventure activities and overnight we send information home via **Parentmail** describing the **visit/visits programme** and ask parents to apply their consent and make payment where applicable online. **When families have online access issues or are unable to use online payment methods due to a protected characteristic such as a disability or religious or sincerely held belief, we** have alternative and discreet arrangements where we will supply letters with a consent slip and can accept cash and cheques.

If we take pupils to a facility that requires us to sign a waiver or disclaimer on behalf of parents, like a high ropes course, we will look for one that enables parents to read and sign it directly with the provider. Otherwise, we will provide parents with the full text of what we will sign on their behalf and specifically draw their attention to its importance. This might be a link to the facility's website where full details are published, or it could be a physical hard copy of the waiver.

We don't need parental consent to use personal data, including image or voice recordings when we use it for education purposes. Using the names, images and voices of children in their work and in displays inside school is a fundamental part of their education, personal development and how we celebrate them. Video and photographs taken on school trips are a rich source and this does not affect anyone's statutory rights (as described in our Privacy Notice). Anyone can raise any concern with any member of staff about our use of their or their child's data at any time and we must ensure the rights of the individual are upheld if we've got no good reason to refuse.

We need parental consent to use any video or photos taken on educational visits for other reasons such as marketing or self-promotion in publications and on websites or social media platforms directly managed by us or, with our permission, by others associated with us and this may include pictures that have been drawn by children. For more information please see our **Data Protection Policy (make into a hyperlink to your policy)**.

We don't need parental consent to share children's personal data with a supplier or provider when the data is necessary to operate a contract with them. For example, a child can't cycle on a hired bike unless the provider knows how tall they are to supply the right sized bike, a child can't take part in certain water activities unless the provider knows if they can already swim, a child allergic to certain foods can't be kept safe from them if we don't tell the activity centre's kitchen etc.

Our school Privacy Notice includes a general recognition that there are times when we do this kind of data sharing. When we know we will need to share personal data with a specific third-party provider like this, we will obtain a copy of, or a link to that provider's Privacy Notice, passing it on to parents and drawing their attention to what it says **before** they sign any consent for their child to take part. This helps us ensure that any trips consent we have is "fully informed". If we don't tell families about this data sharing, we risk failing to ensure their legal rights e.g. the right to object, the right to have information about them corrected etc. and we risk not having fully informed consent for the visit.

To ensure we provide consistently good information, there is a range of approved template letters home. Visit leaders must amend the most appropriate template to suit their individual visit, but may only use the relevant approved wording when they outline our arrangements for:

- charging, voluntary contributions & cancellation (where pupils change their mind about attending, or become unable to attend through injury/ill-health before departure, or are withdrawn by us for failing to meet any agreed pre-conditions, or any other relevant circumstances that we know are not insured;
- **agreeing contracts or terms & conditions, acknowledgements of risk, disclaimers, or waivers (see section 13 Contracts and waivers).**

- insurance (for more information on cover see [section 12](#) Insurance below).
- place allocation procedures when visits are oversubscribed. Allocation of places by the “first come, first served” method including return of a deposit is not permitted because imposing financial conditions on securing a place discriminates against pupils of low-income families and does not comply with our [wider](#) equality duty).

When there is any kind of dispute about who is responsible for providing parental consent we will follow DfE Guidance Document: [Understanding and dealing with issues relating to parental responsibility \(Sep 2018\)](#) and we will comply fully with any court orders in effect. Where parents cannot agree, we might ask the parties in dispute to seek independent legal advice about obtaining a court order setting out exactly what decisions each parent can make in respect of the child (a Specific Issue or Prohibited Steps Order as appropriate).

4 Vetting and Safeguarding

Read OEAP documents [4.3e: Safeguarding](#) (guide to good practice safeguarding arrangements) and [3.2g: Vetting and Disclosure and Barring Service \(DBS\) Checks](#) (detailed guide to deciding what vetting process needs to apply when people who do not already work in regulated activity accompany visits, most commonly volunteers, activity providers, and exchange hosts).

Outline your vetting and safeguarding expectations for visits planning.

For example:

All leaders are expected to have an understanding of and use for reference OEAP documents: [4.3e: Safeguarding](#) (guide to good practice safeguarding arrangements), and [3.2g: Vetting and Disclosure and Barring Service \(DBS\) Checks](#) (detailed guidance on deciding what vetting process needs to apply when people who do not already work in regulated activity accompany visits, most commonly volunteers, activity providers, and exchange hosts) when planning visits.

They should seek to identify and address vetting requirements at the earliest opportunity. Where there is any doubt whether an individual requires an Enhanced Disclosure for Regulated Activity (commonly known as an Enhanced DBS with Barred List check), **the EVC** will make the final decision in consultation with the Designated Safeguarding Lead (DSL) as necessary.

Any safeguarding concerns which arise during a visit must be reported to the DSL (or deputy DSL) at the earliest opportunity and we will ensure that the visit leader has appropriate 24/7 contact details for them. The visit leader must also have the appropriate local police and social care referral information in case a pupil is in immediate danger away from their home authority.

Visit leaders must consider very carefully the safeguarding and data protection implications of providing pupils with panic cards designed to be shown to a stranger if they need help that include where they are staying or contact details for their accommodation. They should also consider how appropriate it is to involve an un-vetted third party like a hotelier in incidents such as lost pupils. The school telephone number or the visit leader's trip mobile number may be more appropriate.

Careful consideration also needs to be given to whether the visit leader's trip mobile number should be provided to parents in case of emergency. If the group is caught up in a major incident, worried parents using the number might inadvertently put pupils in danger or stop the visit leader being able to seek help for the group. The EVC will advise.

5 Exchanges and Homestays

Delete this entire section if you don't participate in exchange visits or homestay arrangements.

Read OEAP documents [7f: Exchanges and home stays](#) (detailed guidance on how homestays should be planned and managed); [3.2g: Vetting and Disclosure and Barring Service \(DBS\) Checks](#) (on the vetting requirements for hosts); [6r: FAQ Hosting a Homestay](#) (guidance aimed at potential hosts to explain their

role and your safeguarding responsibilities for them); [7r: Overseas Visits](#), and the model forms for homestays in [Section 8](#) of the OEAP library.

Outline your expectations for exchange visits planning.

For example:

Leaders planning any visit involving a homestay are expected to have an understanding of and use for reference OEAP documents [7f: Exchanges and home stays](#) (detailed guidance on how homestays should be planned and managed); [3.2g: Vetting and Disclosure and Barring Service \(DBS\) Checks](#) (on the vetting requirements for hosts); [6r: FAQ Hosting a Homestay](#); [7r: Overseas Visits](#), and the model forms for homestays in [Section 8](#) of the OEAP library.

When we ask volunteers from our school community to host an exchange student in the UK, we will give them access to a copy of OEAP document [6r: FAQ Hosting a Homestay](#) which explains their role and our safeguarding responsibilities for them and the children they host.

Before submitting their visit for approval, leaders should first check that it has been planned in accordance with the checklist in OEAP document 7f, and when approving it **the EVC and Head/Manager** will follow the same checklist.

6 Overseas Visits and Specialist Activities

Read guidance in Section 7 of the [OEAP Library](#) and document [3.2h: Self-organised visits and the package travel regulations](#) where they are relevant to the LOTc you offer.

Outline your expectations for specialist activities and overseas visits planning.

For example:

Some visits include activities with special and significant health and safety, or financial risks and they require careful consideration at the planning stage and throughout.

Leaders are expected to have an understanding of and use for reference the guidance in section 7 of the [OEAP Library](#) and document [3.2h: Visits and the Package Travel Regulations](#) where relevant to the visit they are planning. Often, the need will depend on how significant location specific hazards are i.e. a visit to a park to feed ducks is unlikely to need an in-depth understanding of OEAP document 7i: Group Safety at Water Margins, but a complex river study in a challenging environment will.

Such activities might include (list includes links to the numbered OEAP guidance):

[7a: Adventure activities](#)

[7b: Duke of Edinburgh Award expeditions](#)

[7c: Collaborative Provision](#)

[7d: Using OEAP Outdoor Learning Cards](#)

[7f: Exchanges and home stays](#)

[7g: Farm visits](#)

[7h: Field studies](#)

[7i: Group Safety at Water Margins](#)

[7k: Unaccompanied Expeditions](#)

[7l: Camping](#)

[7m: Heritage visits](#)

[7n: Museums and Galleries](#)

[7o: Natural water bathing](#)

[7q: Overseas expeditions](#)

[7r: Overseas visits](#)

[7t: Provider-led study and sports tours](#)

[7v: Snowsport visits](#)

[7x Swimming pools](#)

[7y: Using armed services providers](#)

[7z: Visitor attractions](#)

[3.2h: Visits and the Package Travel Regulations](#)

7 Induction, Training, Apprenticeship and Succession Planning

Read OEAP document [3.2d: Approval of Leaders](#) (outlines good practice procedures in assessing leader competence).

Outline how visit or activity leadership is approved and your expectations for staff induction and training.

For example:

The minimum expectations we have of all leaders is that they are accountable, confident, and competent in line with OEAP guidance [3.2d Approval of Leaders](#), so we follow an appropriate recruitment process which includes vetting (see [Section 4 on Vetting and Safeguarding](#) above), assessment and induction.

Volunteers who take a lead or solo supervision role will undergo the same recruitment and induction process as staff, but in proportion to what they are being asked to do. For example, a parent helper leading a sub-group solo as one of 10 sub-groups in a theme park (with several school staff available) will need a less rigorous assessment and induction than a parent helper who is a qualified climbing instructor and offers to lead a group climbing a local crag with one member of staff. There is plenty of support at the theme park, but if anything happened to our staff at the crag, the parent helper would be taking full charge and they need to understand the role and what would be expected of them.

Specialist activity leaders who we are responsible for under our Employer's Liability Insurance are required to provide evidence of their competence to lead such activities e.g. a suitable qualification or training certificate, a log book or summary of at least 12 of their most recent relevant activities, and in some cases, the testimony of a third party qualified to assess the individual as an instructor in their field. Advice must be sought from our competent health & safety advisors where necessary.

Our EVC will undertake the nationally recognised OEAP EVC course and attend regular refresher training [state timeframe - EVC training does not expire but the OEAP recommends regular refreshment and every 3-5 years might be reasonable]. We are also committed to investing in the continuing professional development of our staff wherever we can [e.g. an after school CPD session on risk assessment or visits management, critical incident briefings and practice, forest schools qualifications,].

8 Risk Benefit Analysis and Risk Management

Read OEAP guidance documents [4.3c: Risk management - an overview](#); [4.3f: Risk management - some practical advice](#); [4.3g: Risk management - what to record and how](#), on risk management and how to do it effectively & proportionately or KAHSC guide [Risk assessment: Evaluating risk \(risk rating\)](#) may be useful.

Outline your expectations of the risk assessment process that must be undertaken before every off-site visit.

For example:

Leaders are expected to have an understanding of and use for reference OEAP documents, [4.3c Risk Management - an Overview](#); [4.3f Risk Management - Some Practical Advice](#); [4.3g Risk Management - What to Record and How](#) on risk assessment and how to do it effectively and proportionately when planning visits. Visit leaders who use KAHSC generic risk assessments may find the KAHSC guide [Risk assessment: Evaluating risk \(risk rating\)](#) helpful.

New or inexperienced leaders will receive adequate induction, training and mentoring in visit procedures and especially our risk management expectations.

We expect them to involve all accompanying staff, and young people where appropriate, in the planning and preparation of visits, including risk management and recording of the risk-benefit assessments.

The only absolute requirements of a risk assessment are that it must be completed by a person competent in leading the activity and be suitable, and sufficient. We have no set requirements on format but recommend [insert any preferred models e.g. KAHSC generic risk assessment templates hosted at www.kymallanhub.co.uk or the [Play England Risk Benefit Assessment template](#)].

When planning Category 1 visits, dynamic (mental) risk assessment as events unfold will be the primary key to keeping people safe. To ensure they are properly prepared, leaders must review our generic

procedures for managing emergencies and the applicable generic risk assessment template we recommend considering the activities, locations, and needs of the group. Experienced leaders are **not** expected to carry out a specific written risk assessment for these visits unless there is something exceptional about the activity, location or pupils. Experienced leaders should tick the declaration on the Generic Risk Assessment tab in their draft visit online and select the appropriate templates they have reviewed. Inexperienced leaders will be mentored through the risk assessment process which might include them needing to evidence their visit specific risk management plans in a written risk assessment to be uploaded to the Custom Risk Assessment tab online for the first few visits they lead. The EVC will direct them at the time they seek approval in-principle.

When planning Category 2 visits, leaders must review our generic procedures for managing emergencies and the applicable generic risk assessment templates we recommend considering the activities, locations, and needs of the group, and make visit specific plans.

All category 2 visits require visit specific written risk assessments to be uploaded to the Custom Risk Assessment Tab on the risk assessment page of an online record, and some may also require a specific written emergency plan for the group or an individual.

In limited circumstances, the EVC may instruct a visit leader that specific written risk assessment of the journeys involved, such as on a day trip to an adventure centre, is **not** required because the journey is simple and directly comparable with journeys undertaken for Category 1 visits where written risk assessment is not generally required. This is unlikely to ever apply to an overnight or highly equipped visit where the quantity of luggage or equipment carried will raise journey risks unless specially considered and managed.

Using the STAGER one-sheet approach to recording risk assessment is not a substitute for using the contents of any existing generic risk assessments that we recommend, as a prompt or aide memoire to guide visit planning. It is just a substitute for recording the visit-specific measures decided on separately on each generic template used.

8.1 Our duty of care

Recap OEAP document [3.2a: Underpinning Legal Framework and Duty of Care](#) (outlines legal responsibilities, especially the section on our Non-Delegable Duty of Care).

Outline your understanding of your duty of care and your expectations of leaders when planning activities involving third party providers taking a leading role.

For example:

We expect all staff and, to a limited extent volunteers, to understand the key elements around our duty of care to pupils outlined in OEAP document [3.2a Underpinning Legal Framework and Duty of Care](#) as follows.

The staff, volunteers and third parties we engage to work for or with us have a legal duty to take *reasonable* care to avoid acts or omissions which could *reasonably* be foreseen to cause injury to anyone for whom they should *reasonably* have regard.

The legal expectations for the different standards of care are:

- non-specialist/non-professional adult (that of an ordinary 'reasonable person' - traditionally referred to as "what the man on the Clapham omnibus would do" e.g. a parent helper with no relevant professional skills).
- adult with expertise/specialist knowledge (that of a 'reasonable professional' - a higher standard than that of the 'reasonable person' e.g. staff or a parent helper with a relevant professional skill e.g. teacher, youth worker, childminder, social worker, activity instructor).
- employers ('in so far as is reasonably practicable' - the balance of cost against the benefits of putting controls in place and deciding what people do in our name - the highest standard held by governors).

This is why a leader's understanding of our duty, the due diligence (reasonable investigation) required in selecting third party providers, and what to include in their briefings to helpers and third parties are so important.

We understand that because we work with children, who the law sees as vulnerable due to their age and inexperience, our duty of care is non-delegable. This means that if a pupil suffers injury or loss due to the negligence of a third party that we engaged, we might be held at least partly responsible for what went wrong and if the third party's insurance doesn't cover the outcomes, our insurers could become liable.

We expect leaders to carry out adequate due diligence when engaging third party providers to deliver activities with clear handover procedures agreed.

All staff and to some extent volunteers must ensure third parties who are leading activities "take reasonable care" too. For this reason, pupils will not be handed over to the care of a third party without an accompanying member of school staff or helper unless there is a very good reason which has been adequately explained to those with parental authority and agreed to by responsible all parties.

8.2 Effective supervision

Read OEAP documents [4.2a: Group management and supervision](#) (good practice guidance on arrangements for direct, indirect and remote supervision) and [4.3b: Ratios and effective supervision](#) (explains what to consider when deciding what an adequate supervision ratio of competent adults to pupils might be).

Outline your expectations of supervision arrangements on different kinds of visits.

For example:

(NB: The variance at secondary school age is very wide and staff may find it helpful if you give them more guidance like a very brief sample range of activities where professional prudence should dictate a supervision ratio *better than 1:15* is required; a ratio *around 1:15* is required, and a ratio *around 1:20* is required.)

Leaders are expected to have an understanding of and use for reference OEAP documents, [4.2a Group Management and Supervision](#) (outlining good practice guidance on arrangements for direct, indirect and remote supervision) and [4.3b Ratios and Effective Supervision](#) (which explains what to consider when deciding what an adequate supervision ratio of competent adults to pupils might be) when planning visits.

The only legal requirement around supervision on off-site visits relates to trips involving pupils in Year One and the Early Years and Foundation Stage (aged 5 and under) who must be accompanied off-site by a qualified Paediatric First Aider.

We acknowledge that there is no such thing as a definitive ratio for a specific age group undertaking a particular activity off site and we expect leaders to make decisions based on their risk assessment.

Our best practice expectation for supervision on all visits is that there will be two competent adults, one of who will be an employee, to suit the gender of participating pupils i.e. a male and a female adult when boys and girls will be present. **This is not an absolute requirement.**

Where single sex supervision only is available for a mixed sex group, this may be acceptable, but must be specifically drawn to the attention of those with parental authority in case they have any objection.

There may also be circumstances when a leader is:

- lone working with pupils [e.g. during an inter-school tournament],
- indirectly supervising pupils [e.g. on theme park trips],

When this is the case, we will have a reciprocal care arrangement with other suitable adults [e.g. a teacher at the school hosting the tournament will take responsibility for the group and follow the agreed plan to return them home] or pupils will have the knowledge and skills to cope if their leader becomes

incapacitated or fails to rendezvous with them as agreed, and they will be adequately briefed on what to do and equipped to do it e.g. the means to communicate, availability of extra funding etc.

Generic risk assessment templates that we might recommend our leaders use to help them plan the risk management of their visits may have guideline supervision ratios on them, but they are only ever “starting points for consideration”. We do not endorse a generic numbers approach to the safe supervision of educational visits and guidelines will only apply where the activity is relatively straightforward, and the group has no special requirements.

Leaders should be able to use the **STAGER** framework to explain their supervision decisions and, particularly for Category 2 visits, consideration of the following should feature clearly in their written visit specific risk assessment:

- **Staffing:** Who is needed/available and what breadth and depth of skills, knowledge, awareness, judgement, training and experience do they have relevant to all likely situations?
- **Timings:** When will it impact the stage of study most, what staff are needed (including back at school), are there any clashes with events at home or at the destination e.g., religious holidays that may affect participation or safety, and what other impacts do timings have e.g., daylight, peak times, cost, missing school transport home, availability of activities.
- **Activities to be undertaken:** What do you want the group to do and what is possible?
- **Group characteristics:** How does prior experiences, abilities, behaviour and maturity, gender, any specific or medical/dietary needs affect plans?
- **Environment:** How do environmental conditions affect plans, and have we considered journeys too?
- **Remoteness:** Can help easily be summoned in an emergency, are communications between the group and base straightforward, and what are the likely travel circumstances and conditions, and any overseas travel requirements such as visas?

Any guideline ratios must be used with professional prudence.

8.3 Transport

Read the ones relevant to what you do from OEAP documents [4.5a: Transport general considerations](#) (good practice guidance on making any kind of transport arrangements); [4.5b: Transport in minibuses](#) (guidance on who can and who can't drive a minibus on school business and good practice when managing and driving them, including outside the UK); [4.5c: Transport in private cars](#) (good practice guide on arrangements and checks required); [4.5d: Seat belts and child restraints](#) (guide to the law on providing the appropriate child restraints required on road transport); [4.5e: Hiring a coach](#) (guidance on how to select a provider, the questions to ask and evidence to see); [Driving school minibuses advice: schools and local authorities](#) (DfE advice on when school employees with a car driving licence may drive a minibus and when a Section 19 Permit might be required); and [KAHSC Safety Series G11: Driving and Managing Minibuses](#) (good practice guidance on owning and using minibuses which includes important forms to assist in approving drivers and carrying out checks).

Outline your expectations of those making visits transport arrangements.

For example:

Anyone making transport arrangements for our visits is expected to have an understanding of and use for reference OEAP documents [4.5a Transport General Considerations](#) (good practice guidance on making any kind of transport arrangements), and [4.5d Seat Belts and Child Restraints](#) (a guide to the law on providing the appropriate child restraints). **If it is a provider we have never used before, the leader must ensure the appropriate checks are completed and results given to Sara Royle so that they can approve them before making any booking or agreement.**

Drivers cannot supervise pupils and drive. If the age, maturity, behaviour, special or medical needs mean they need active supervision during a journey, another responsible adult must accompany the driver.

Hired road transport with a driver

We have a list of appropriately licensed operators of coaches, small buses, minibuses and taxis who have demonstrated to us that they meet our requirements in line with relevant parts of OEAP guide [4.5e Hiring a Coach](#) (guidance on how to select a licensed UK operator to provide transport by road, the questions to ask and the evidence to see). All such transport will be arranged with them.

Before we use a new operator for the first time **Sarah Collison – Office administrator** will use [4.5f Checklist - Assessing a Coach Hire Provider](#) to get enough assurances **to add the operator to our Approved List.**

Driving minibuses

Anyone making arrangements for us to drive pupils in minibuses, whether we hire or borrow them, is also expected to have an understanding of and use for reference [Driving school minibuses advice: schools and local authorities](#) (DfE advice on when employees with a car driving licence may drive a minibus and when a Section 19 Permit might be required), and OEAP document [4.5b Transport in Minibuses](#) (guidance on who can/can't drive a minibus on school business and good practice when managing and driving them, including outside the UK), and [KAHSC Safety Series G11: Driving and Managing Minibuses](#) (good practice guidance on owning and using minibuses which includes important forms which assist us in approving drivers and carrying out checks) when they plan journeys.

When staff or other adults volunteer to drive a minibus on school business they will undergo our approval process using the [Minibus Approval to Drive e-Form](#) **[from Keswick MAT]. Mike Thompson Driving Consultant - minibus driver training and assessment process that potential drivers must complete before they can be approved to drive.]**

Anyone who arranges minibus transport, where our staff or volunteers drive, must ensure they understand the licensing implications when drivers passed their car driving test **after 1 January 1997**. Only drivers licensed **before** that date will have Category D1 (not for hire or reward), licensing them to drive a minibus of any weight and tow a trailer on UK roads. Drivers licensed **after** that date will not have Category D1, so they are not licensed to drive a minibus at all on UK roads.

To be able to legally drive a minibus on UK roads, drivers without D1 on their licence, must display a valid Section 19 Permit in the windscreen of the vehicle they are driving. They are restricted to driving minibuses weighing a maximum of 3.5 tonnes (or 4.25 tonnes if they are adapted for disabled access) and may never tow a trailer.

No charges will be made, or voluntary contributions requested for any journey involving self-driven minibuses or for anything in connection with the minibus journeys i.e. the activity at the end of it, unless a valid Section 19 Permit is displayed in the windscreen of the vehicle used.

We need one Section 19 Permit for every minibus we drive at the same time. Keswick MAT own **1** permit(s) and they are kept **[at Keswick School]**. They are valid for 5 years and it is the responsibility of **[Paul Roberts at Keswick MAT]** to renew them when they become due. This involves completing the [PSV372](#) form and following the instructions on applying in Cumbria [here](#) or for any part of the UK [here](#) and paying any administration fee.

A Section 19 Permit is not valid outside the UK which means that only drivers with a full Category D1 on their licence (without the 101 which signifies 'not for hire or reward') can drive a minibus on school business abroad. All other drivers are restricted to driving Category B vehicles such as people carriers or multi-purpose vehicles (MPVs) abroad.

Transport in private vehicles

Anyone making arrangements for us to transport pupils on visits in privately owned vehicles is also expected to have an understanding of and use for reference OEAP document [4.5c Transport in Private Cars](#) (good practice guide to the arrangements and checks required) when planning journeys.

All drivers, whether staff or volunteers, are required to undergo the same process to be approved to drive pupils in their own vehicles. Each driver must complete a [Driving Declaration Form](#), provide

evidence of insurance, and consent to online checks being carried out on their driving licence for motoring convictions, and their vehicle tax & MOT status where relevant.

Drivers who are our own employees are required to have the class of business use motor insurance for their vehicle which allows them to carry pupils on school business. They are reminded at least annually of their responsibility to have this insurance and to advise us of any motoring convictions, medical conditions or medicines they are taking (as they arise) if they might affect their approval to drive.

Drivers who are volunteers are asked at least annually to refresh their Driving Declaration to reflect their continued understanding of their responsibilities, their current insurance renewal date, and consent to another set of online checks as required. If volunteers will drive pupils regularly, we instruct them to advise their insurance company of the regularity and to ensure their provider does not consider this volunteering requires business use and that their current cover is enough.

We understand that when we organise transport using parent or other volunteer helpers then the activity could be classed as regulated in any one of two ways:

- a). If the helper is alone in the car with pupils then there is arguably an element of supervision, and so this meets the activity definition.
- b). Driving a vehicle being used solely to transport young people under an agreement with the school also meets the activity definition.
- c). The deciding factor is whether the same helper transports pupils 'frequently' or 'intensively'. If they do then this is regulated activity (see [section 4](#) Vetting and Safeguarding above for requirements), if they don't then it is not. Those organising this kind of transport need to be aware of any vetting required at the earliest stage of planning.

When parents make private transport arrangements between themselves, those journeys will not be considered as being taken on our behalf and they will not fall under the scope of these procedures.

9 Assessing Facilities and Providers

Read OEAP documents; [4.4h: Using external providers and facilities](#) (outlines the difference between a facility and a provider and the research required to select appropriate ones); [4.4f: Assessing an adventure activity provider check list](#) (a checklist for visit leaders to use to assess their potential provider); [6a: FAQs: Asking for a provider's risk assessments](#) (which explains why risk assessments are rarely a helpful measure of provider quality assurance); and [8g: Provider Statement Form](#).

Outline your expectations of leaders when they are selecting facilities or third-party activity providers.

For example:

Leaders planning to use an external facility or provider are expected to have an understanding of and use for reference OEAP documents [4.4g Selecting External Providers and Facilities](#) (outlines the difference between a facility and a provider and the research required to select appropriate ones); [4.4h Using External Providers](#) (guidance on roles and responsibilities when using providers); [4.4f Checklist - Assessing a Provider](#) (a checklist for use to assess a potential adventure provider); and [6a: FAQs: Asking for a provider's risk assessments](#) (which explains why risk assessments are rarely a helpful measure of provider quality assurance).

A single venue could be either a facility or a provider depending on what it's being used for. The local football stadium will be a facility when pupils are taken there to watch a match. The local football stadium will be a provider when pupils are taken there to have a professional coaching session with the hometown team. The difference is the control the third party has over what pupils do. At the match there is passive control by the stadium through barriers, signs, and stewards etc., but school staff have full active control over everything the group does. At the coaching session there is active control by the stadium who take complete charge of delivering a coaching session while school staff have passive control through the pastoral support they offer from the sidelines.

When selecting a third-party provider, leaders must look for suitable quality assurance markers like accreditations with relevant professional bodies. Adventure Activity providers must hold an AALA licence when they offer certain activities to children who are not accompanied by their own parents. For details and to check a provider's licence go to: www.hse.gov.uk/aala. Providers that hold a Quality Badge do not need to provide further assurances about the safety or quality of their provision. Only if the specific needs of the group or visit are particularly complex should there be further investigation of an accredited provider. For details of the Quality Badge scheme and to check a provider's accreditation status go to: lotcqualitybadge.org.uk.

If a provider does not hold a suitable accreditation which covers all aspects of their provision, leaders must use other means of gaining assurances about their operation. Using the [KAHSC Provider Risk Management Statement Form](#) or the [OEAP 8g: Provider Statement Form](#) is an effective way of doing so. Leaders should first look for a pre-prepared 'Provider Statement', sometimes called a 'Management Statement of Competence' or a 'Risk Management Summary'. If the provider has one and it addresses all the points in the form, they must not be asked to complete the form.

We do **not** expect leaders to ask a provider for copies of their risk assessments because they are unlikely to be qualified to understand, assess and, if necessary, challenge them. Instead they are expected to look or ask for information that will help them run a safe and successful visit.

It is not necessary to look for such accreditation or assurances from facilities that are open to the general public and where no arrangements are being made for them to provide activities or supervision, but they must still be assessed as suitable for the needs of the visit.

While websites, review forums and smart communications make it easier than ever before to gather information about facilities and providers, reliability can be questionable and there is no substitute for a preliminary visit, so we are committed to enabling staff to make them where necessary and possible.

If the leader is unable to answer yes to all the questions in checklist 4.4f in the section "Do you need to carry out a pre-visit to the provider?" they must discuss with the EVC whether they should. This cost may need to be built into the overall visit budget. Where a preliminary visit is not reasonably practicable, the leader should give special consideration as to how they will gather enough information to make an adequate assessment of their risk management and other issues.

10 Emergency Procedures and Incident Reporting

Leaders are expected to put in place an adequate 'Plan B' for every visit in case something reasonably foreseeable goes wrong with the original plan e.g. the venue is unexpectedly shut, the weather turns, the car park becomes inaccessible etc.

Leaders planning any visit which might be significantly affected by a terrorism-related incident are expected to read [4.4e Terrorism](#), (how to prepare and stay safe in places with a threat of terrorism) and [KAHSC Terrorism Considerations for Educational Visits](#) and plan accordingly.

Even if the risks of direct involvement in a terrorism-related incident are judged especially low, consideration must be given to how the knock-on effects of an incident elsewhere might end up directly affecting the group such as cancelled public transport, closed roads or stations, shut venues, very lengthy transport delays and security checks etc.

10.1 First aid

Read OEAP document [4.4b: First aid](#) (good practice guide on making decisions about first aid provision on visits). For detailed guidance on all aspects of managing first aid see KAHSC Safety Series G02: Managing First Aid (as above and explains the different qualifications and how to choose a quality course or provider); and [Resources for schools & youth organisations | Counter Terrorism Policing](#) (instruction on priorities and actions to take during or in the aftermath of an incident).

Leaders are expected to understand and use for reference OEAP document [4.4b First aid](#) when they plan provision for trips. It outlines the law and provides good practice guidance on making risk-based

decisions about the first aid arrangements that might be needed. Where relevant, they should also make use of the [Resources for schools & youth organisations | Counter Terrorism Policing](#).

Decisions about first aid must be based on the leader's risk assessment and, for Category 1 visits, be recorded in the online Activity Details section or in their online note to the EVC when they submit it for approval, or for Category 2 visits, be recorded on at least one written risk assessment uploaded online. Because it might be important in a claim for personal injury or damage compensation that we provided "suitable first aid", the name and qualification of our first aiders accompanying a trip must be included.

Basic first aid support must always be available from either our own qualified adults or from the facility or provider. In some of the lowest risk circumstances the need might be satisfied by proximity to a local hospital or an urgent care/walk-in/minor injuries unit and the EVC will advise.

When visits include pupils in Year One or the Early Years and Foundation Stage (children aged 5 and under) they must be accompanied off-site by a qualified Paediatric First Aider. [

When visits include outdoor adventure activities led by our own employees or volunteers, the adventure activity leader will have a current and suitable first aid qualification, usually the 16 hours outdoor first aid course. When adventure activities are led by a provider, we expect leaders to see or receive assurances that there is adequate first aid available from the provider.

It is a legal requirement that all public service vehicles, including our school minibuses, carry a first aid kit. It is the responsibility of Paul Roberts – Keswick MAT to carry out the periodic vehicle maintenance checks which includes all on-board equipment. It is the visit leader's responsibility to check that the on-board first aid kit is present and correct before departure. Supporting pupils with medical conditions

Read OEAP documents [4.4d: Medication](#) (good practice guide to managing medicines and medical needs off-site); [6o: FAQs: Recognising and managing anaphylaxis](#) (the emergency action summary from the full [Department of Health: Guidance on the use of adrenaline auto-injectors in schools](#)); and; [Department of Health: Guidance on the use of emergency salbutamol inhalers in schools](#).

Outline your expectations of leaders in taking account of medical needs in their visits planning.

For example:

Leaders are expected to have an understanding of and use for reference our policy on Supporting Pupils with Medical Condition, [procedures for managing asthma and anaphylaxis](#), and OEAP documents: [4.4d Medication](#) (good practice guide to managing medicines and medical needs off-site); [6o FAQs: Allergies and Anaphylaxis](#) (the emergency action summary from the full [Department of Health: Guidance on the use of adrenaline auto-injectors in schools](#)); and; [Department of Health: Guidance on the use of emergency salbutamol inhalers in schools](#) (particularly the emergency action summary) where relevant, in taking account of medical needs in their visits planning.

Leaders must make themselves aware of how a pupil's medical condition or medical needs might impact on their participation in off-site activities (primarily through development of their Individual Healthcare Plan (IHCP)). Leaders are responsible for ensuring their visit meets our equality and inclusion duties and that any reasonable adjustments necessary have been or will be made.

Leaders must also make themselves aware of the medical conditions or medical needs of all accompanying adults if they might have a significant effect on visit or contingency planning. Adults must be able to provide information on a need-to-know basis only with a reasonable expectation of confidentiality.

A pupil will only be excluded from an activity if the Head teacher considers, based on the available evidence, that no reasonable adjustment can make it safe for them, or when evidence from a clinician, like a GP or consultant states that an activity is not possible for a pupil.

The leader's risk assessment will need to specially consider planning arrangements and controls to support pupils with medical needs. Most of that work will have already been done in the IHCP which is a risk assessment, and it may need updating in light of planned activities and be taken on the visit and/or uploaded to the online record.

Leaders must also take with them any forms or templates they need to manage or record the use of medicines i.e. the range of appendices available in our 'Supporting Pupils... Policy' such as general or individual administration records, the asthma/AAI registers etc.

Pupils who need emergency medicines like a salbutamol inhaler, or an Adrenalin Auto-Injector (AAI) will always carry one discreetly on their person (if competent to), and staff or another suitably briefed and trained adult will carry a spare. Leaders must ensure that they know whether they have parental consent to administer our school-owned inhaler or AAI to a pupil instead of, or as well as, their own prescribed medicine.

AAIs and other urgent care medicines like anti-histamines or paracetamol are never to be regarded as part of a first aid kit and should not normally be kept inside one, but for security and accessibility reasons they may need to be carried in travel kits while out on excursions and all accompanying adults must be suitably briefed about this on a need-to-know basis.

When arranging visits overseas, we expect leaders to consult www.nhs.uk/common-health-questions/medicines/can-i-take-my-medicine-abroad **at least three months before the planned departure**. By then, leaders must know whether anyone in the group needs to carry a syringe device; a UK controlled drug e.g. methamphetamine derivatives like Ritalin; or a drug that is controlled/illegal in the destination country or countries travelled through. This is because special travel documents may be required and can take time to arrange. In some circumstances, doctors may need to be asked to prescribe an alternative drug for the visit. When pupils will travel with a controlled drug, leaders must follow up the NHS advice by referring to www.gov.uk/travelling-controlled-drugs, to include consulting with the relevant embassies and making suitable arrangements when a drug is controlled over there.

If there will be a pupil on the visit whose, life, health or education will become at significant risk if their medicine is lost, ruined by poor storage, or destroyed, there needs to be a proportionate plan to replace it as urgently as necessary. Leaders must know how to do this if they are overseas.

Leaders needing specific guidance about individual pupils regarding first aid or medical arrangements should consult the **SENDCo/ EVC / Head teacher** before seeking visit approval.

10.2 Accident/incident recording and reporting

Read OEAP document [4.1a: Avoiding Accidents and Emergencies](#) (outlines good leadership habits and lessons learned from accidents, with some useful pointers on preventing and managing them).

Outline your expectations of leaders when they plan to avoid, respond to, record and follow up accidents or incidents during visits and refer to any of your other policies that will help them.

For example:

Leaders are expected to apply the general good practice leadership principles in OEAP document [4.1a Avoiding Accidents and Emergencies](#) (outlines good leadership habits and lessons learned from accidents, with some useful pointers on preventing and managing them).

If a pupil or adult that we have a responsibility for is injured on a visit, it must be recorded in the accident book of the responsible employer, where there is one. At a hotel or any other place where people work, it would be reportable to them as a member of the public injured in their workplace. Depending on the need for hospital treatment or the severity of the injury, they would be responsible for reporting the injury at their workplace to the HSE under RIDDOR. It must also be properly recorded back at school. If there is no other responsible employer because it did not happen at someone else's workplace, we must record it and we will be responsible for reporting a RIDDOR event to the HSE.

Leaders must follow our accident and incident recording procedures while away using an appropriate form to capture enough detail to make a proper report back at school. If the incident was serious this might include obtaining witness statements, taking photographs etc. to help us explain what has happened to parents and to provide useful evidence in case of a claim for compensation.

Detailed guidance on accident recording, reporting and investigation is available in [KAHSC Safety Series G03: Accident Reporting & Investigation](#) and our own Accident and Incident Recording and Reporting Procedures.

10.3 Critical incident procedures

Read or look at all 14 OEAP documents on handling emergencies in [section 4.1](#) of the OEAP library and decide if you want to use their template Action Cards. The following is just a list of hyperlinks to each OEAP document with a description of what it is for that you might want to copy and paste into relevant parts of your instructions. Users can download them while they read these procedures.

[4.1b Emergencies and Critical Incidents – Overview](#) (outlines what a critical incident might be and the plans and support that the establishment must or are advised to ensure are in place).

[4.1c Emergencies and Critical Incidents - Guidance for Leaders](#) (outlines good practice for visit and activity leaders in the management of off-site emergencies).

[4.1d Emergencies and Critical Incidents - Guidance for Establishments](#) (guidance for settings on how to manage emergencies and critical incidents).

[4.1e Emergencies and Critical Incidents - Guidance for Employers](#) (guidance for employers on how to support their settings during emergencies and critical incidents off-site).

[4.1f Emergencies and Critical Incidents - Guidance for First Contact](#) (guidance and an instruction and prompt card for the Emergency Base Contact (EBC) person's first contact with the leader having the emergency, with questions they must ask and useful telephone numbers) or [KAHSC Emergency Action Card - First Contact Person](#);

[4.1g Model Emergency Procedures for Visit Leaders](#) (an editable instruction and prompt card with useful telephone numbers for the visit leader having the emergency) or [KAHSC Emergency Action Card - Visit Leader](#) and [KAHSC Out-of-Hours Emergency Contact number](#).

[4.1h Model Emergency Plan for Establishments](#) and/or [4.1i Model Critical Incident Plan for Employers](#) (a model to be copied and tailored to create a plan for your organisation - you must acknowledge the OEAP if you use it).

Clearly outline your visit emergency procedures or refer to them if they are separate. Consider using the OEAP model and copying useful text from it into this section or make it standalone and add in a link below to where staff can access it.

You might also want to devise an "Emergencies Pack" which contains some of the emergency action and record cards if you have already customised with your own useful telephone numbers.

As the employer, governors have the ultimate responsibility when things go wrong and every individual that holds a designated role in the management of visits or visit leadership is expected to read, understand and seek any clarification they need about managing emergencies before any visit plans are finalised.

11 Inclusion

Read OEAP documents: [3.2e: Inclusion](#) (a guide to the law, our inclusion duties and good practice); [4.4i: Special Educational Needs and Disabilities](#) (a guide to the law, our duty not to disadvantage pupils with SEND and good practice); [4.4L Transgender Young People and Visits](#) (a guide to sensitive planning); and [4.4m: Young people in a sexual relationship](#) (outlines the considerations and good practice).

Leaders are expected to plan activities in line with our **Equality**, **Inclusion**, and **Behaviour** policies [[state locations or provide links to these policies](#)], and the inclusion principles outlined in OEAP documents [3.2e Inclusion](#) and [4.4i Special Educational Needs and Disabilities](#). They need to take all reasonable steps to include all pupils with no pupil being directly or indirectly discriminated against.

Where necessary, advice must be sought from **the SENDCo, behaviour lead, EVC, Head teacher**.

Any pre-conditions on suitable health or behaviour that could affect a pupil's participation in a visit (because they lack fitness or become excluded) must be adequately explained at the very outset to pupils, parents, and anyone else involved in decision-making or providing relevant support for the pupil, especially if parents will suffer financial loss if their child is withdrawn from a trip. There must adequate record keeping to facilitate an open and fair decision with a clear review process in agreed stages. The final decision on whether a pupil participates in a visit rests with **the Head teacher**.

In considering how some pupils may need to be accommodated, leaders should also refer to OEAP documents [4.4L Transgender Young People and Visits](#) (a guide to sensitive planning); and [4.4m Young People in a Sexual Relationship](#) (outlines the considerations and good practice) and follow relevant recommendations, and [4.4n Mental Health](#) (outlines the benefits to mental health of outdoor learning, and advice on how to manage participants' mental health).

12 Insurance

Read OEAP document [4.4c: Insurance](#) (a guide to insurance requirements and options).

Outline your expectations of leaders when they consider insurance issues in their visits planning. Include a summary of your own insurance arrangements or links to your policy terms and schedule so they understand the extent and limitations of cover and can appropriately advise parents.

For example:

Leaders are expected to understand and use for reference OEAP document [4.4c Insurance](#) (a guide to insurance requirements and options) to ensure they understand what kinds of insurance cover could or needs to apply to their plans. They must also ensure they understand the extent and limitations of cover our existing insurance policies provide.

When the terms of any insurance policy will materially affect pupils and parents, we will draw their attention to them and advise about any significant gaps for example, when personal belongings or personal accident not covered (because there was no negligent party). The minimum information we will provide about our cover on request is the Schedule of Insurance (which values personal injuries and often sets other claim limits) and any exclusions and limitations. This is so that parents can make an informed choice about purchasing their own additional insurance cover.

When leaders choose a third-party provider to deliver activities where there is a real risk of a pupil sustaining a life-changing injury, such as during adventure activities or thrill-seeking sports, we require a minimum of **£10m** in Public Liability Insurance (PLI) cover. Leaders must see evidence of the cover that will apply during the visit, such as the certificate stating the amounts of cover and renewal date or a broker's Letter of Insurance Cover Confirmation. Providers that hold a LOTC Quality Badge publish their PLI limit and expiry date on the register at lotcqualitybadge.org.uk/search. If the policy expires before the date of the visit, the leader must look for or ask to see the current evidence when it becomes available.

If we fail to secure enough PLI from a provider to cover the costs associated with an injury that a pupil suffers due to the provider's negligence, our insurance may be held liable if it was reasonable that we should have sought better cover (case law *Woodland v Essex CC* 2013).

13 Contracts and waivers

Read OEAP document [3.2i Contracts and Waivers](#) (a guide to what might be meant by contract, terms and conditions, risk acknowledgement, disclaimer, and waiver and how to decide what is and is not acceptable).

Visit leaders are expected to understand and use for reference OEAP document [3.2i Contracts and Waivers](#) (a guide to what might be meant by contract, terms and conditions, risk acknowledgement,

disclaimers, and waivers and how to decide what is and is not acceptable) when their arrangements require any such agreements.

This includes the understanding that a contract does not have to be in writing and can include verbal agreements, exchanges of emails, a ticket purchase, telephone booking etc. and that details in advertisements, brochures, and on websites etc. do not necessarily form part of a contract and that they must check what is actually included in any contract that they agree.

All contractual agreements for visits organised by us must be made between us and our suppliers and not directly between suppliers and parents or carers. However, all payment and cancellation terms that we are subject to and that we will pass on to families must be made clear to parents and carers in writing from the outset.

If a participant or parent contracts directly with a supplier, this might conflict with our supervision liabilities (when a parent or carer signs an agreement where safety is heavily contingent on behaviour, but they are not present on the trip to enact their promises) or may conflict with our insurance arrangements and not be covered by us.

Staff who enter into contracts must have the proper authority to do so and risk disciplinary action or personal liability for any costs involved if not.

14 Finance

You cannot make any charges to parents unless you have a charging policy, so make it the basis for this section.

Outline your expectations of visit leaders in applying your charging policy and managing visit finances.

For example:

Leaders are expected to understand their role in providing best value and avoiding any significant visit deficit or surplus as well as in implementing our Charging and Remissions Policy. We have template letters with approved wording which outline what parents must be told in different circumstances about any charges being made, remission offered, funding that can be applied for, or voluntary contributions requested.

Any payment terms, financial conditions or financial commitments will be explained to parents before we seek their consent so that it is fully informed.

Leaders are expected to cost visits carefully to ensure there is no significant surplus or deficit, but to also plan any necessary contingency funding where it is simple, predictable and will arise under circumstances outside of our direct control. For example, an activity on the Wednesday of the residential will cost £X. If the weather is wet the alternative activity will cost £2X. The visit leader should budget for the wet weather activity.

Visit leaders will be given access to enough contingency funding through insurance arrangements, or school debit or credit arrangements in the case of minor disasters like missed transport connections or lost tickets.

Surplus visit funds will be disposed of as decided by the Head teacher in line with normal financial regulatory procedures i.e. returned to parents or retained and accounted for future visits. Visit Leaders are encouraged to plan small 'upgrades' into the latter part of a trip where a surplus is expected. This is where a leader will have 2 alternative plans based purely on cost e.g. meal option 1 or meal option 2. Otherwise Leaders who realise as the trip is ending that they have a surplus should spend it on the attendees e.g. a snack break paid for by the trip funds rather than out of pupils' pockets as originally planned. This is a relatively fair way to distribute any small surplus.

15 Visits Evaluation and Monitoring

Read OEAP document [3.2b: Monitoring](#) (good practice guide to monitoring LOTC for safety and quality); [4.2c Reviewing](#) (guide to the process of reflecting on an experience to learn from it and using with

participants to facilitate their learning and development, and with colleagues to develop practice); and [5.1d Evaluation](#) (guide to visits evaluation considering why, what, and how to evaluate).

Our governors are expected to regularly monitor the implementation of our policies and procedures for LOTC in line with OEAP guidance [3.2b Monitoring](#) (good practice guide to monitoring LOTC for safety and quality); [4.2c Reviewing](#) (guide to the process of reflecting on an experience to learn from it and using it with participants to facilitate their learning and development, and with staff to develop practice); and [5.1d Evaluation](#) (guide to visits evaluation considering why, what, and how to evaluate). They do this mainly by using reports to them from the Head teacher or EVC and [section 4 of the [KAHSC Governor Monitoring Pack \(Autumn\)](#)]

16 Further Guidance

Add here any sources of further guidance available to your staff.

OEAP

All other relevant OEAP documents in sections [6](#) and [7](#) of the OEAP library that are not already specifically referenced above.

Ofsted good practice guides

Available in section 4 of the OEAP library:

[4.6a: Good Practice - Neston High School](#)

How the school secures high attainment and levels of progress through a well-integrated curriculum with a broad programme of LOTC.

[4.6b: Good Practice St John's RC Primary School](#)

How this primary school regularly uses LOTC on its own site, in its local area and on visits and trips to provide rich experiences, promote safety, raise expectations and attainment for all, and narrow the achievement gap across the broad curriculum.

[4.6c: Good Practice Lavington Park Federation](#)

A journey of discovery at two small federated schools as they use the outdoors to improve learning provision and pupil engagement with pupil, focusing on the strategies to improve geography and other subjects as part of an integrated approach to the curriculum.

[4.6d: Good Practice - Netherfield Primary School](#)

How a primary school makes effective use of resources and space to provide children with outstanding indoor and outdoor learning experiences.

[4.6e: Good Practice - Farley Nursery School](#)

How a nursery plans imaginative outdoor activities to develop children's problem-solving, reasoning and numeracy skills, focussing on how using outdoor spaces helps to explore and cement concepts such as distance and height, which are more limited indoors.

[4.6f: Good Practice - Victoria Park School](#) (primary)

A review of the extent and range of learning outside the classroom in the natural environment (LINE) activities and their impact on staff and students.

[4.6g: Good Practice - Curledge Street Academy](#) (primary)

A review of the extent and range of learning outside the classroom in the natural environment (LINE) activities and their impact on staff and students.