

July 2013



Thames Primary Academy

Educational Visits Policy

Inspirational
Supportive
Encouraging
Effective
Ambitious
Imaginative

**Policy for the Management of Supported and Offsite Visits
(including Learning Outside the Classroom)**

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1. Provision of Employer Guidance

Blackpool Council (the LA) acknowledges the immense value of supported and offsite visits and related activities and fully supports and encourages those that are well planned and managed.

It is a legal expectation that employees must work within the requirements of their employer's guidance; therefore Blackpool employees who work with children, young people and adults on supported or offsite visits and related activities must follow this policy most of which is a

reflection of Outdoor Education Advisers' Panel (OEAP) Employer Guidance (EG) www.oeapeg.info and/or the LA Adult Services Procedures Manual.

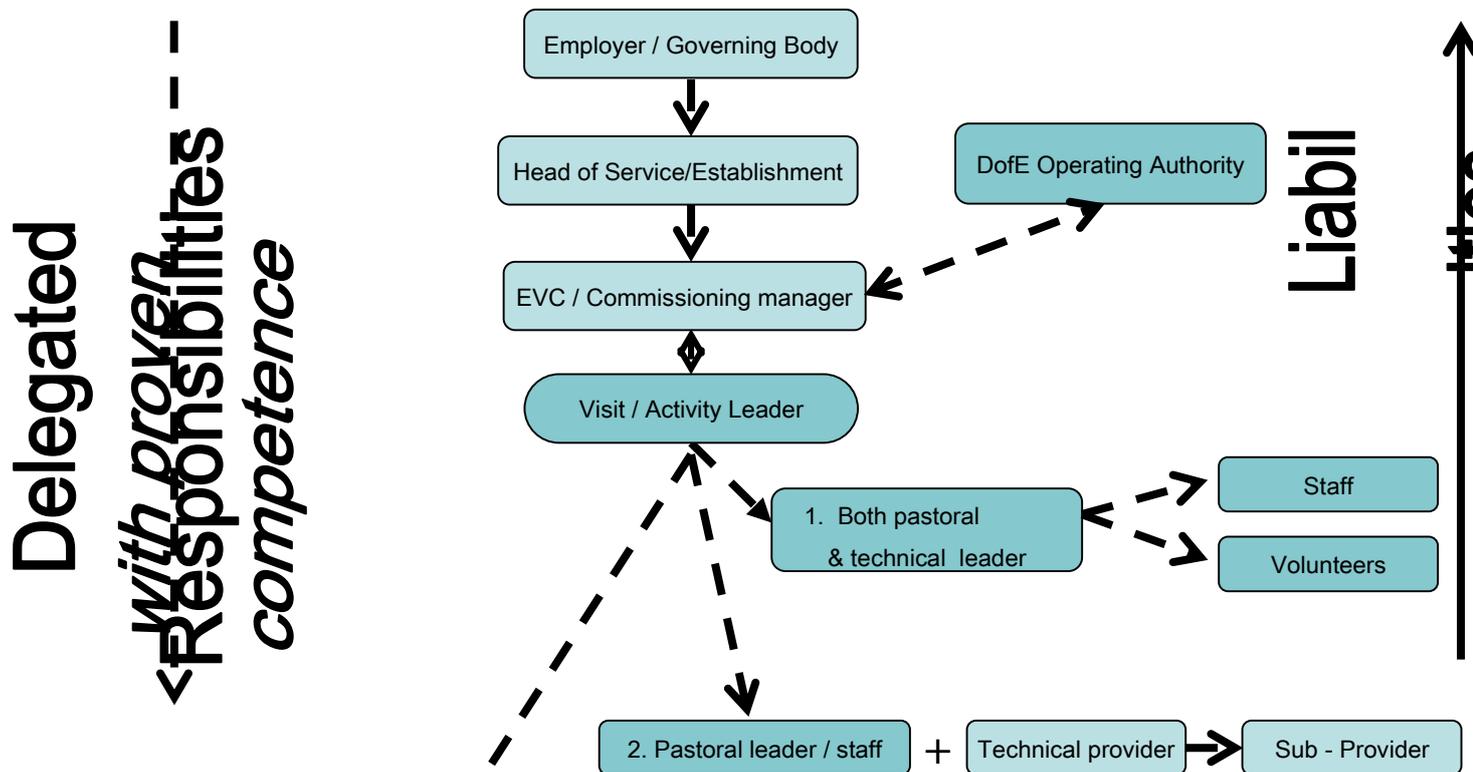
This policy provides managers and staff in LA schools and services with a clear picture on how to fulfil their health and safety duties. This policy supports and reinforces a commonsense and proportionate approach to health and safety and assessment of risk in line with the Government's drive to discourage wasteful bureaucracy. Nevertheless documentary evidence is still needed to support the fact that appropriate advance attention is given to the risks of an activity.

Where another employer (such as the Governing Body of a Voluntary Aided, Foundation or Academy school) wishes to opt into Blackpool guidance, along with the LA's systems and processes for supporting and monitoring activities, they should produce a policy statement that makes this clear.

Where a Blackpool employee commissions an activity, they must ensure that such commissioned agent has either:

1. adopted Blackpool Guidance, OEAP EG or Adult Services Procedures Manual **or**
2. has systems and procedures in place where the standards are not less than those required by the documents named above.

The flow chart below illustrates the lines of responsibility and liability.



2. Scope and Remit

This policy and the related guidance applies to employees whose work involves any one of the following:

- direct supervision of children, young people and adults undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of children and young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for children, young people and adults undertaking experiences beyond the boundary of their normal operational base;

- deploying staff who will supervise or facilitate experiences for children, young people and adults undertaking experiences beyond the boundary of their normal operational base;

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

3. Ensuring Understanding of Basic Requirements

As an employer, Blackpool is required to ensure that its employees are provided with:

- appropriate guidance relating to visits and activities;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed Advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

Blackpool uses a web-based system, EVOLVE, to facilitate the efficient planning, management, approval, monitoring and evaluation of visits. All staff that lead or accompany visits can access their own EVOLVE account, which is set up by their service/establishment's Educational Visits Coordinator (EVC). As well as being an efficient tool for planning and approving visits, EVOLVE also contains a variety of features including search and report facilities, downloadable resources and information, staff records and visit history.

EVOLVE can be found at www.blackpoolvisits.org

It is a requirement of Blackpool Council that at least one senior member of staff from each CAF service/establishment should attend an OEAP accredited EVC Training course and will then act as EVC and support the Head of Service/Establishment. In small services/establishments the EVC may also be the Headteacher or Head of Service and where an EVC has not been appointed this role will fall, by default, to the Headteacher/ Head of Service. Heads should ensure that the EVC undertakes a formal revalidation approximately every 3 years.

The EVC should be specifically competent, ideally with practical experience in leading and managing a range of visits similar to those typically run by the service/establishment.

The EVC should ensure that a policy is in place for supported and offsite visits, and that this is updated as necessary and readily available to staff as well as uploaded on to EVOLVE.

Adventurous Activities

If the service/establishment is leading an adventurous activity, as listed on EVOLVE, the manager must ensure that the group leader and other supervisors are suitably competent to lead or instruct the children, young people or adults in the activity. Competences should be demonstrated by holding the relevant National Governing Body (NGB) award where it exists. Where there are queries regarding the competencies/experience required, the Team Leader LOtC or relevant NGB should be contacted for advice

Other Areas

Staff competence in areas such as first aid, minibus driving and life saving must also be considered when planning activities.

Volunteers will require induction training prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process.

Where an employee requires further guidance they should contact the nominated adviser.

The nominated adviser in Blackpool is:

Suzanne Holroyd,

4. Approval and Notification of Activities and Visits

LA approval is required for visits and activities fulfilling any of the criteria below:

- Visit/activity involves the provision of an adventurous activity to be led by a member of service/establishment staff or an external provider
- Visit/activity involves field work to be led by a member of service/establishment staff in an area of open country
- Visit/activity involves a journey abroad or a significant sea crossing (this includes visits to the Isle of Man, Northern Ireland, the Orkneys and the Shetland Islands)
- Visit/activity involves a stay of one or more nights

Blackpool uses an online system for notification and approval called EVOLVE. A key feature of this system is that visits and activities requiring LA approval are automatically brought to the attention of the LA. Those visits and activities not requiring approval may be viewed sampled or monitored using the database and diary facilities of the system.

It is a requirement that all Blackpool services and establishments use the EVOLVE system. For further advice and help using the system, the service/establishment should contact the nominated adviser (see section 3).

5. Risk Management

As an employer, Blackpool has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring Blackpool to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. Blackpool strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is “acceptable”. HSE endorse this approach through their **Principles of Sensible Risk Management** and advocate that it is important that people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal or Blackpool requirement to produce a risk management plan in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. However, Blackpool LA ensures that services/establishments are supplied with an electronic portfolio of exemplar generic risk-benefit assessments via EVOLVE.

It is strongly recommended that services/establishments adopt and adapt these materials to ease the burden of bureaucracy that might otherwise discourage leaders from making full use of activity opportunities.

Risk assessment procedures should be clearly outlined in each service/establishment’s own LOtC or Supported/Offsite Visits Policy and a library of generic risk management plans made available to staff.

6. Emergency Planning

Staff involved in a visit must be aware of and adhere to their service/establishment's policy on emergency procedures.

A critical (serious and untoward) incident is an incident where any member of a group undertaking a supported or offsite activity has:

- either suffered a life threatening injury or fatality;
- is at serious risk;
- or has gone missing for a significant and unacceptable period.

Certain incidents are also reportable to HSE under RIDDOR (Reporting of Injuries Diseases and Dangerous Occurrences Regulations), see www.hse.gov.uk/riddor.

For further information on reporting accidents see www.hse.gov.uk/pubns/edis1.pdf.

As an employer, Blackpool is committed to providing emergency planning procedures to support services/establishments in the event of a serious and untoward incident. Initially, any incident should be handled by following the Service/Establishment's policy and procedures but, if it is deemed necessary to activate support from Blackpool Council, the following telephone number should be used: **01253 477600**

7. Monitoring

As an employer, Blackpool ensures that there is sample monitoring of the visits and activities undertaken by its services/establishments, either by attaching such monitoring duties to its officers, or by delegating these tasks to services/establishments. Such monitoring should be in keeping with the recommendations of the relevant Employer Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the service/establishment EVC.

8. Assessment of Leader Competence

Those organising, leading or supervising visits or activities must be competent to do so. The EVC must assess competence, taking account of staff's ability to lead, manage and control the children, young people and adults partaking in the visit. Competence on specific activities may also be necessary, as well as knowledge of the venue being visited.

Blackpool Council policy is that a competent Visit /Activity Leader (or an assistant leader where they may take sole responsibility for a sub-group) requires:

- Knowledge and understanding of their employer's guidance supported by service/establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.
- Knowledge and understanding of service/establishment procedures supported by a structured induction process specified by the service/establishment.
- Knowledge and understanding of the group, the staff, the activity and the venue.
- Appropriate experience
- In some circumstances (e.g. first aid, adventurous activities), a formally accredited qualification.

Staff participating in supported or offsite activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with their employer guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. Services/Establishments should view the original documents and certificates when verifying leaders' qualifications, and not rely on photocopies.

A volunteer leader cannot be the designated Visit Leader because they are not legally contracted or commissioned. The Health and Safety at Work Act 1974 places overall responsibility for health and safety with the employer and, while volunteers are not employees, they must work to the requirements of the employer within the service/establishment where they volunteer their services.

Employers have legal duties to ensure, so far as is reasonably practicable, the health, safety and welfare of all employees and volunteers.

Volunteer helpers must:

- Be suitably competent and knowledgeable about service/establishment and employer policies/procedures - insofar as they affect the responsibilities they have been assigned;
- Understand the role, responsibilities and limitations assigned and how these integrate with other staff;
- Be prepared to contribute to the evaluation of all aspects of the visit, both during and after the event;

Where a Volunteer Helper is a parent, close relative or partner of a participant on the visit they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the risk assessment process.

OEAP accredited Visit Leader Training is strongly recommended for all Blackpool employees who lead activities. Currently there is no revalidation requirement however leaders must be current in their knowledge of expectations of good practice, so update refresher training is also strongly recommended.

9. Charges for Activities and Visits

Blackpool Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996 or the LA Adult Services local service guidance.

10. Vetting and CRB Checks

Blackpool employees who work *frequently* or *intensively* with, or have *regular access* to young people or vulnerable adults, must undergo an enhanced CRB check as part of their recruitment process.

For the purposes of this policy:

- *frequently* is defined as "once a week or more";
- *intensively* is defined as 3 times in a 30 day period or overnight (2am - 6am).

However, it must be clearly understood that a CRB check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

The placement of an adult within a situation of professional trust (where children, young people and/or adults could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that an overview based on a common sense risk-benefit assessment process has been considered.

Blackpool's recommendation to schools for trainee teachers on placement is that they only accept CRBs obtained through the university or college for where the organisation has signed up

to say that they will share our criteria to operate to certain minimum standards. (The practice of using a CRB obtained through another organisation is known as portability. Currently the CRB do not endorse this practice.)

11. Requirement to Ensure Effective Supervision

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is “effective”.

The LA requires services/establishments to ensure there is an appropriate level of supervision at all times for all visits and that such supervision is effective. This must have been approved by the EVC and Head of Service/Establishment and, where applicable, in accordance with Governing Body policy.

Effective supervision should be determined by proper consideration of:

- age (including the developmental age) of the group;
- gender issues;
- ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics etc);
- nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions,
- staff competence.

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

Staff assigned to support the special needs of particular individuals cannot be included in the overall staffing ratio. Their responsibility should not include the wider group.

Particular consideration should be given to the additional implications that may arise if staff are to be accompanied by family members (or partners) on visits.

12. Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of children, young people and adults. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit.

Service/Establishment policy should clarify the circumstances where a preliminary visit is a requirement.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

- The LOtC Quality Badge
- AALS licensing
- Adventuremark
- NGB centre approval schemes (applicable where the provision is a single, specialist activity).

Blackpool takes the view that where a provider holds one of the above accreditations, there should be no need to seek further assurances.

If the provider does not hold a recognised accreditation, the service/establishment must ask the provider to complete and return an Independent Provider's Questionnaire.

13. Insurance for Activities and Visits

Employer's Liability Insurance is a statutory requirement and Blackpool holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it if it is proved that the Council has been negligent in its duties. This cover extends to those persons who are acting in a voluntary capacity as assistant leaders. Blackpool also holds Public Liability insurance, indemnifying it against all claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property where negligence on the part of the Council is proved. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities and visits organised by all services/establishments for which the employer is responsible.

Some level of Personal Accident Insurance is provided for all Blackpool employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit / Activity Leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

Blackpool Visit/Activity leaders should contact the local authority's Insurance Department to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

The policies above consider claims where Blackpool is considered by the claimant to be at fault and the claimant wants compensation. However, for overnight stays or appropriate day trips Blackpool's liability insurance policies do not provide sufficient cover on their own. Group Leaders should therefore give consideration to the following 3 types of insurance cover and satisfy themselves that adequate cover is in place:

- Travel insurance

This covers risk such as cancellation, medical expenses, loss of money, loss of personal effects, business equipment, personal accident etc. When travelling abroad, Visit Leaders must carry an Injury & Travel Assistance Card supplied by the insurer. Visit Leaders should ensure that any hazardous activities are covered by the Insurance Policy used.

- Motor Vehicle Insurance

As a minimum third party cover must be in place. Visit/Activity leaders should contact their own insurance company to confirm that their level of cover is appropriate and that they are covered for business use.

- Liability Cover

When using an external provider, the Visit/Activity Leader must ensure that the provider has Public Liability Insurance in place with a minimum limit of £5 million.

14. Inclusion and the Equality Act 2010

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or

religion. If a visit needs to cater for people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Services/Establishments should take all *reasonably practicable* measures to include all children, young people and adults. The principles of inclusion should be promoted and addressed for all visits and reflected in service/establishment policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Employers, Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a legal issue.

Under the Equality Act 2010, it would be discriminatory to:

- treat a disabled person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

Staff must be aware of appropriate language and behaviour towards children, young people and adults from diverse backgrounds.

15. Adventure Activities Licensing Regulations

Employers, Heads/Managers, EVCs and Leaders should have a basic understanding of where and when the provision of adventurous activities is legally regulated.

The Activity Centre (Young Persons Safety) Act (1995) established the Adventure Activities Licensing Regulations and the Adventure Activities Licensing Authority (AALA), initially responsible to the DfES. The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Service (AALS).

The intention of the regulations is to provide a regulatory framework to protect children, parents, teachers and schools when using providers of defined adventurous activities in closely defined environments. The regulations and supporting inspection regime provide a formal process of professional inspection to accredit that providers have effective safety management systems and processes, meeting a national standard.

The definitive source of advice on the Licensing Regulations is to be found in the Health and Safety Executive publication: "**Guidance to the Licensing Authority on Adventure Activity Licensing Regulations 1996**".

Leaders should be aware that the AALS license is an assurance of safety. It does not accredit educational or activity quality.

16. Transport

Careful thought must be given to planning transport to support activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and services/establishments **must** follow the specialist guidance provided in Blackpool's transport policy. All national and local regulatory requirements **must** be followed.

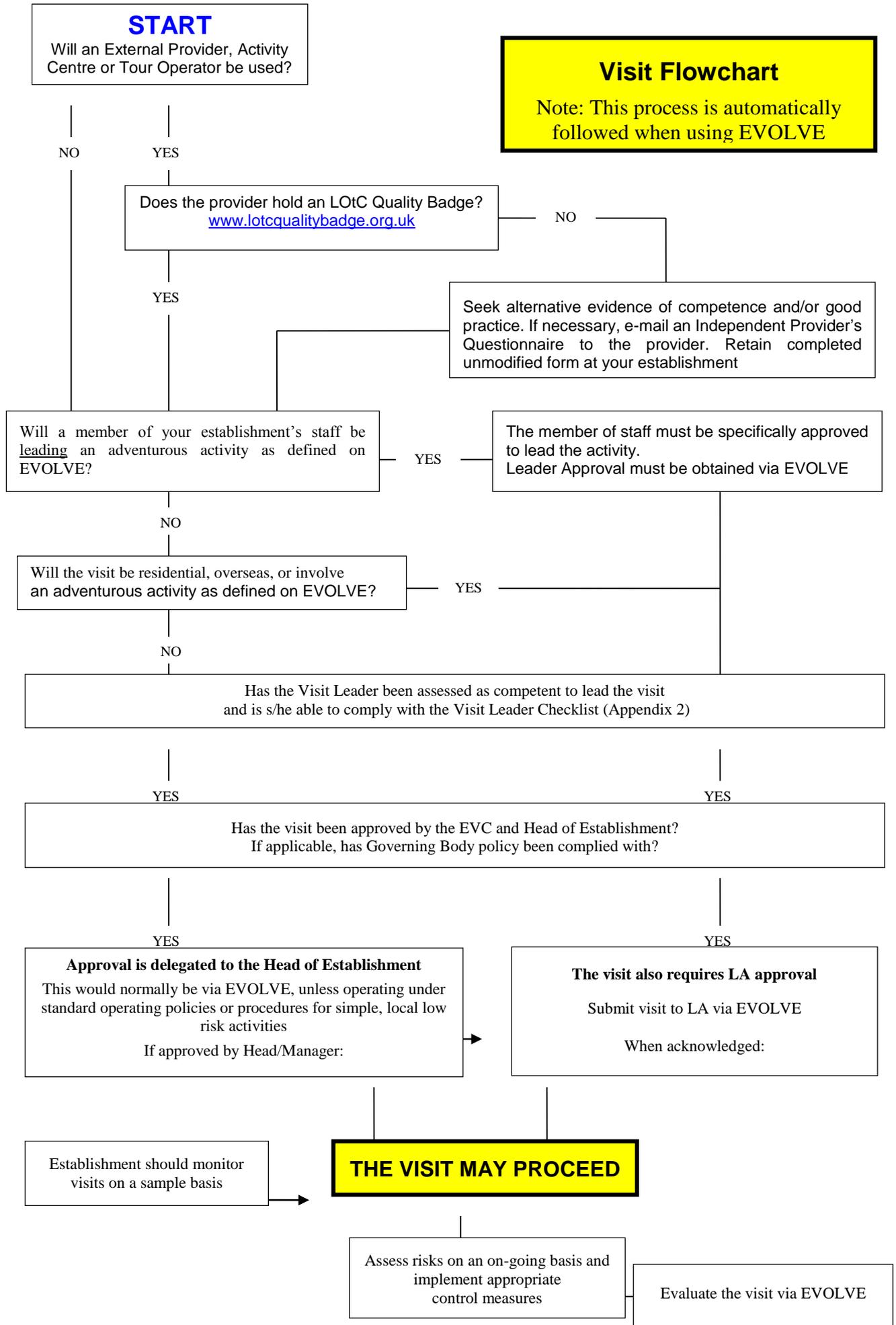
The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when

considering what supervision is required for the specific group of passengers being transported in a minibus.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

Transporting people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

Appendix 1



Appendix 2

Visit Leader Check List

- I have met all requirements of my employer's and my establishment's policies relevant to the visit.
- I am confident to lead the visit and have the specific competence to do so, and have been judged so by my head / manager in line with my employer's requirements.
- I have planned and prepared for the visit, involving staff in the planning and risk management process to ensure wider understanding
- I have kept my EVC informed at each stage of the planning process
- I have undertaken a preliminary visit if appropriate or required by establishment policy
- I have involved young people in these processes, wherever appropriate
- I have defined the roles and responsibilities of other staff (and young people) to ensure effective supervision, and have appointed a deputy
- I have shared details of 24/7 emergency contacts and emergency arrangements with key staff
- I have obtained parental consent forms (where required), medical details and contact details and these have been copied and shared with relevant staff and providers
- I have checked whether insurance arrangements are adequate
- If accompanying leaders take a family member on a visit, there are adequate safeguards to ensure that this will not compromise group management
- Child protection issues are addressed, including CRB/ ISA checks and processes where appropriate
- I have disseminated relevant information to supporting staff
- There is access to first aid at an appropriate level
- Relevant information has been provided to parents and young people and pre-visit information meetings have been arranged where appropriate
- All aspects of the visit (both during and after the event) are evaluated
- Staff and other supervisors have been appropriately briefed on:
 1. the nature of the group, including age, health characteristics, capabilities, special educational needs, likely behaviour and any other information relevant to the planned activities
 2. the nature and location of the activity
- The visit is effectively supervised - staffing ratios meet requirements of good practice
- I understand that the overarching duty of care remains with establishment leaders, even when partial responsibility is shared with a provider
- Staff and third party providers have access to emergency contact and emergency procedure details