

**SHROPSHIRE COUNCIL  
POLICY AND GUIDANCE  
FOR  
EDUCATIONAL VISITS AND JOURNEYS  
  
JANUARY 2021**

**Link to National Guidance: [www.oeapng.info](http://www.oeapng.info)**

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## Foreword

As we are all aware, education is more than the acquisition of knowledge. Improving young people's understanding, skills, values and personal development that can significantly enhance learning and achievement for young people. Learning outside the classroom is not an end, rather it could be viewed as a vehicle to develop the capacity to learn. It can provide a framework for learning that uses surroundings and communities outside the classroom. This enables young people to construct their own learning and live successfully in the world that surrounds them.

Learning outside the classroom and offsite trips are about raising young people's achievement through an organised, powerful approach to learning in which direct experience is of prime importance. Meaningful learning occurs through acquiring skills through real life hands-on activities. This is not only about *what* we learn, but most importantly, *how* and *where* we learn.

Improving young people's understanding, skills, values, personal and social development can act as a vehicle to develop young people's capacity and motivation to learn. Real-world learning brings the benefits of formal and informal education together and reinforces what good educationalists have always known: that some of the most meaningful learning occurs through acquiring knowledge and skills through real-life, practical or hands-on activities.

The September 2019 Ofsted Framework recognizes the role of experiences beyond the classroom as being key in bringing both the curriculum alive and preparing young people for the world of work and family. Enrichment activities linked to a broad and balanced curriculum are important components and we welcome Ofsted's recognition of this. Work experience, off-site visits, opportunities to develop and encourage healthy lifestyles all play a role in the holistic all-round development of young people attending Schools in Shropshire.

I therefore welcome this policy and guidance which should support staff to organise valuable learning experiences beyond school whilst at the same time ensuring that the young people, and those caring for them, are safe and that their wellbeing protected.

**Steve Compton**  
**Principal School Improvement Adviser**  
**Shropshire Council**

|                         |   |
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| <b>NEXT REVIEW:</b>          | December 2022  |
| <b>RELATED DOCUMENTS:</b>    | The Department for Education (DfE) Guidance Health & Safety on Educational Visits November 2018<br><a href="https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits">https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits</a> |
|                              | Outdoor Education Advisers Panel - National Guidance for the Management of Outdoor Learning, Off-site Visits and Learning Outside the Classroom (Reviewed and updated on regular basis)<br><a href="https://oeapng.info/">https://oeapng.info/</a>   |
|                              | Shropshire Council Guidance – School Emergency Plan  |
| <b>SUPERSEDED DOCUMENTS:</b> | DfE Guidance 1998 – Health and Safety of Pupils on Educational Visits (HASPEV) and Part 1, 2, & 3 supplements  |
|                              | DfE Guidance 2001 – Health and Safety: Responsibility and Powers   |
|                              | Shropshire Council Employers Guidance for Educational Visits and School Journeys - September 2016  |
| <b>AUDIENCE:</b>             | Head Teachers, Principals and Managers of Schools; all other educational settings; other private, voluntary or independent establishments and those that are commissioned by TWC   |
|                              | Educational Visit Co-ordinators (EVCs)   |
|                              | Visit Leaders / Assistant Leaders  |
|                              | Governing bodies   |
|                              | Local Authority Officers – Shropshire Council: <ul style="list-style-type: none"> <li>• Directorate for Education and Corporate Parenting</li> <li>• Shropshire Council Internal Health and Safety service</li> <li>• Legal and Insurance Services</li> <li>• Public Health and Civil Resilience Services</li> </ul>   |

## **Shropshire Council Policy for Educational Visits and Journeys**

This policy is essential for all those who have responsibility for the approval, planning and/or execution of any educational visit.

All visits must be planned and organised in accordance with this document. The status of this document is mandatory for all Shropshire community and voluntary controlled schools.

Schools / Establishments, school staff and course providers have a duty of care to their children and young people, any accompanying adults, each other and themselves to ensure that they are kept safe and well and, that, in the event of any incident, they are able to respond appropriately in order to minimise the risk of harm.

Any Shropshire foundation or voluntary aided schools choosing not to follow the Shropshire Policy and Guidance must (as employers) have other guidelines in place for educational visits and journeys, which the Local Authority (LA) will expect to be at least as comprehensive as its own guidelines.

### **Shropshire Council is responsible for:**

1. An Outdoor Education Advisor accredited by the Outdoor Education Advisors' Panel
2. Shropshire Local Authority Policy and Guidance for Educational Visits and Journeys which is compliant with Department of Education's guidance 'Health and Safety on Educational Visits' (November 2018) and adopts the Outdoor Education Advisor Panel's National Guidance.
3. Forms 16A to 16H and the E-Visits software system with associated training and support.
4. Initial and revalidation training for Educational Visits Coordinators (compulsory role for all schools)
5. Termly network meetings for Educational Visits Coordinators.
6. Email and telephone support with response time within 5 working days.
7. Monitoring of visits.
8. Approval of more complex Category 2b Educational Visits; outdoor adventurous activities both on/off site, residential visits, visits overseas and their associated journeys.
9. Webpage for guidance, events and resource: [www.shropshirelg.net](http://www.shropshirelg.net).
10. Outdoor Learning and Leadership and Professional Development programme (fees will vary).

### **Schools/ Establishments are responsible for following this policy and guidance and:**

1. Ensuring the School holds a current Educational Visits and Journeys SLA.

2. Appointing an Educational Visits Coordinator (EVC), who at St George's is: Rebecca Manning, and makes sure they have the training they need. The Head Teacher has this duty if there is no coordinator. The EVC works with the Shropshire Outdoor Education Adviser to help their colleagues in schools to assess and manage risks.
3. The EVC should:
  - be an experienced visits leader
  - have the status to be able to guide the working practices of other staff
  - be confident in assessing the ability of other staff to lead visits
  - be confident in assessing outside activity providers
  - be able to advise Head Teachers and Governors when they're approving trips
  - have access to training, advice and guidance
4. Schools/establishments must have an emergency response plan that covers what to do if there is an incident during an Educational Visit or adventurous activity on site. This must be part of the School/Establishment Emergency Plan. This plan must include communications plan that covers how routine communications should be handled, including regular check-ins and calls to reassure people. Visit Leaders must be familiar and confident with these plans.
5. Schools/establishments using an external organisation or provider are responsible for checking they have the appropriate safety standards and liability insurance. There should be an agreement that makes it clear what everyone is responsible for, which is especially important if the organisation or provider is taking over supervision of the young people. The school/establishment is responsible for making sure required dietary, allergen, medical and behavioural information for both staff and young people are communicated as appropriate.
6. School/establishments are responsible for evaluating all visits once they have concluded from the planning through to the visit itself. Schools/establishments are required to keep a record of any incidents, accidents and near misses. This will help with evaluation of the value of the visit and to learn from any incidents which took place and inform the management of future visits.

# Shropshire Guidance for Educational Visits and Journeys

## 1. Introduction

1.1 This guidance is essential for all those who have responsibility for the approval, planning and/or execution of any educational visit. All visits must be planned and organised in accordance with this document. The status of this document is mandatory for all Telford & Wrekin community and voluntary controlled schools. Any foundation or voluntary aided schools choosing not to follow the Shropshire Guidance must (as employers) have other guidelines in place for educational visits and journeys, which the LA will expect to be at least as comprehensive as its own guidelines.

1.2 Schools/establishments, school staff and course providers have a duty of care to their children and young people, any accompanying adults, each other and themselves to ensure that they are kept safe and well and, that, in the event of any incident, they are able to respond appropriately in order to minimise the risk of harm.

1.3 This guidance sets out Shropshire Council's expectations of how Educational Visits and Outdoor Learning and any associated journeys will be managed by its Employees and those that have adopted their Employer Guidance. To ensure that Visits and Outdoor Learning are properly planned, managed and run by competent staff and to maximise the many benefits, Shropshire Council has adopted Outdoor Education Adviser's Panel (the OEAP) National Guidance.

## 2 Shropshire Council adoption of Outdoor Education Advisors Panel National Guidance



National  
Guidance

2.1 Shropshire Council has adopted the OEAP National Guidance. This will ensure that this Guidance for Educational Visits and Journeys reflects nationally recognised standards. To ensure that the most up to date National Guidance is accessed, please ensure you do so via the OEAP website: <http://oeapng.info/>

2.2 This Policy/Guidance document can be accessed through the Shropshire Council Educational Visits Service Level Agreement which can be accessed by emailing [Ed.visits@shropshire.gov.uk](mailto:Ed.visits@shropshire.gov.uk). All associated guidance, training information, events and resources are found on the webpage: [www.shropshirelg.net](http://www.shropshirelg.net) and also within the documents section of your establishments EVisits site.

2.3 OEAP National Guidance is written and kept up to date by leading and informed professionals and replaces the previous TWC / Shropshire Guidelines. This Guidance contains specific additional detail and clarification that has developed through input from

the Shropshire Council Health and Safety Team, Head Teachers, Educational Visit Coordinators (EVCs) and the Outdoor Education Service.

2.4 In the event of any apparent conflict between Shropshire Council Guidance, your school/establishment's policy or National Guidance, then Shropshire Council Guidance must be followed and clarification sought from the Educational Visits Co-ordinator, Outdoor Education Advisor or management.

2.5 Throughout this document, reference is made to individual OEAP guidance documents; these are the key documents but further information may exist. Shropshire Council recommend the use the OEAP website and its search function, and that the most current version of a document is always used.

### 3. Clarification of Roles

3.1 All visits and Outdoor Learning activities will follow the hierarchy below and this is used in both the paper based and E Visits systems:

- **Visit Leader (VL)** - Initiates, plans and runs the visit and/or Outdoor Learning activity and on return completes an evaluation.
- **Educational Visits Co-ordinator (EVC)** – checks the plans and associated documents, gives outline approval, monitors progress, assesses the success (or otherwise) and provides feedback to improve future visits or Outdoor Learning activities. Under Shropshire Council Employer Guidance every school/organisation **must** have an EVC and they **must** be registered with the Outdoor Education Advisor and be current.
- **Outdoor Education Advisor** – For the higher risk/more complex visits the Outdoor Education Advisor checks the plans and associated documents, gives LA approval (or otherwise) and provides training, advice and guidance to improve future visits or Outdoor Learning activities.
- **Head Teacher/ Senior Manager** – checks that essential elements for the visit or outdoor Learning activities are in place and **must** give their approval by signing the Form A (or equivalent)
- **Governors / Management Board** – will determine which visits and Outdoor Learning they would like to be notified of in advance to give their prior approval. It is their responsibility to ensure an Establishments Visits Policy is in place for their school/organisation as part of their health and safety statutory requirements. This Establishment Visits Policy should clarify any establishment-specific requirements of these and other roles within your school/organisation. Any delegation of key areas of responsibility, such as assessment of competence or approval must be clear. The policy should also set out the criteria for selecting the EVC, if these are different from those recommended in National Guidance.

Refer to OEAP National Guidance 3.1b **Establishment roles and their inter-dependence** for further details.



#### 4. Procedural Requirements

4.1 This guidance applies to all situations where adults acting in the course of their employment have responsibility for children and young people taking part in educational visits and on site adventurous activities.

4.2 All schools/establishments following Shropshire Educational Visits and Journeys Guidance must have a trained EVC who has either been trained by Shropshire Council or has, within 3 years, revalidated their training or obtained elsewhere by attendance at an OEAP EVC course delivered by an OEAP accredited Outdoor Education Advisor. EVCs must attend at least 1 out of 3 Network Meetings each year. Every EVC **must** attend at least one Shropshire EVC training course and then maintain subsequent revalidation. EVCs are also welcome to attend repeat EVC training if this is deemed appropriate. The numbers of EVCs required by the school / establishment is a decision for the Head Teacher / Senior Manager.

4.3 Educational Visits and journeys are placed in 3 categories:-

- **Category 1. Routine activities covered by generic risk management.** These are off-site activities and outdoor learning on-site activities that take place during school hours and which are a normal part of a child's education. These involve no more than an everyday level of risk, such as slips and trips, and are covered by a school's current policies and procedures. They only need a little extra planning beyond the educational aspect of the trip. They can be considered as lessons in a different classroom. These would include the use of the school grounds for enhancing the delivery of the curriculum including data collection and local studies. Also included typically would be regular visits to a library or place of worship. Routine PE fixtures although not covered by Educational Visits and Journeys Guidance would be another example.
- **Category 2a. Visits and/or journeys that require enhanced planning and event/journey specific risk management but are NOT residential, overseas or adventurous.** These visits require one-off consent, parents **must** be given specific information about the visit and their child's proposed participation, and **must** also be given the opportunity to withdraw their consent should they not wish them to participate. Examples will include visits that extend beyond the school day (out-of-hours), longer journeys that involve breaks e.g. for toilets and food stops, and larger public venues such as national museums and cultural events.
- **Category 2b. Visits that are residential, or require travel overseas, or are adventurous in nature.** These require detailed planning to reflect the challenging environments, locations, and higher risk activities. The activities in this category require enhanced Leader competence.
- These visits are those that are any of the following:
  - Residential visits
  - Visits that involve travelling outside England, Scotland and Wales

- On-site adventurous activities
- Off-site adventurous activities
- The associated journey and travel arrangements

4.4 Adventurous activities both day/residential and both on/off site include:

|                               |                              |                            |
|-------------------------------|------------------------------|----------------------------|
| Multi activities (from below) | Abseiling                    | Airborne: all types        |
| Archery                       | Assault course               | Bell boating               |
| Bushcraft                     | Camping in wild country      | Camping on campsites       |
| Caving                        | Clay pigeon shooting         | Climbing: indoor & outdoor |
| Coasteering                   | Cycling on tracks & roads    | Dog sledging               |
| Dragon boating                | Field studies: natural envt. | Forest School              |
| Free running                  | Go karting                   | Gorge walking              |
| Ghyll scrambling              | Hang gliding                 | Horse/pony riding          |
| Hovercraft                    | Improvised rafting           | Jet skiing                 |
| Kayaking                      | Kite surfing                 | Mine exploration           |
| Motorised sports (all)        | Mountain biking              | Mountain boarding          |
| Open canoeing                 | Orienteering                 | Paintballing               |
| Paintballing                  | Pot-holing                   | Powered boats inc. safety  |
| Ropes courses                 | Rowing                       | Sailing                    |
| Sand yachting                 | Scuba diving: lake & sea     | Scuba diving: indoor pools |
| Segway                        | Shooting                     | Skateboarding              |
| Skiing & snowboarding         | Snorkelling                  | Surfing/body boarding      |
| Swimming: not lifeguarded     | Trampolining out of PE       | Walking: hill & moorland   |
| Walking: Lowland              | Walking: Mountain            | Water skiing               |
| White-water rafting           | Wind surfing/sailboarding    |                            |

4.5 EVC's will audit Category 1 and 2a Visits and/or journeys themselves, and refer Category 2b visits to the Outdoor Education Advisor. All visits are given final approval by the Head Teacher or their equivalent in other establishments. Where this responsibility is delegated, this must be clearly stated in the school/establishment policy.

4.6 There are two options to support this process: A forms based system or a software system called 'E Visits'. The forms are included with this guidance in the Appendix, E Visits is provided as part of the SLA and accessed on request through:

[Ed.visits@shropshire.gov.uk](mailto:Ed.visits@shropshire.gov.uk). Each school / establishment chooses the system that works best for its staff.

#### 4.7 Notification and approval of visits and/or journeys

- **Category 1 visits and/or journeys.** These will be organised through the general school planning. Generic risk assessments must be in place and available for the EVC for process checking. Submitted to the Head/Manager for approval as part of annual curriculum for approval. E Visits can be used if desired and this will add any visits to the school/establishment calendar.
- **Category 2a Visits and/or journeys.** Visit Leaders complete Forms A and C (and D if relevant) to the EVC for process checking. On receipt of the Forms from the Visit Leader, the EVC must check that all required information is completed fully and submit to the Head Teacher/Manager for approval. Alternatively, this process can be done through the E Visits software package.
- **Category 2b Visits and/or journeys.** Visit Leaders complete Forms A and C (and D if relevant) to the EVC for process checking. On receipt of the Forms the EVC must check that all required information is completed fully and submit to the Head Teacher/Manager for approval. Once the Head Teacher has approved the Visit, **Forms A and C (and D if relevant)** are submitted to the Outdoor Education Adviser for process checking and approval and notification to Shropshire Council. Again this process can be done through the E Visits software package.

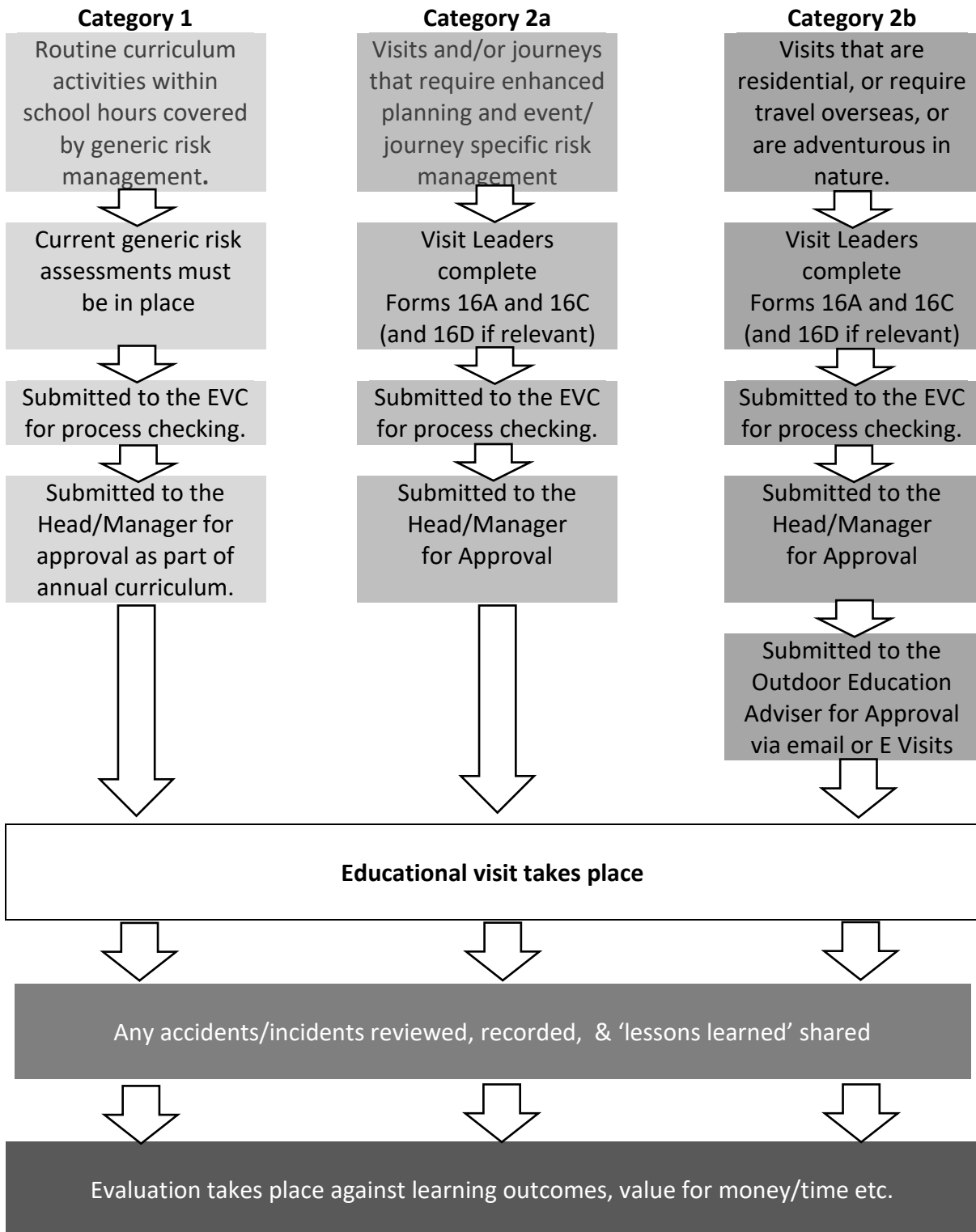
4.8 Shropshire Council strongly recommend that all those who lead learning outside the classroom activities undertake Visit Leader Training to meet OEAP National Guidance requirements regarding leader competence. Leaders must be current in their knowledge of expectations of good practice, so update refresher training is also strongly recommended. Schools and other educational establishments may find training for Visit Leaders can more successfully be delivered to whole staff on training days. There is a 3 hour theory module or a 6 hour theory and practice full course available – both accredited with the OEAP and nationally recognised.

4.9 Shropshire Council requires any commissioned provider, purchased or otherwise, providing educational visits and Outdoor Learning activities to work within the National Guidance and to be able to demonstrate their compliance through a quality standard, accreditation or scheme e.g. Learning Outside the Classroom Badge. The Form D: External Provider Declaration is a generic way to audit a provider's compliance if required. Please note it is NOT a requirement to ask for copies of Risk Assessments from a Provider although a Safety Management Summary should be available for inspection and a reputable provider will provide the necessary information to inform and support a Visit Leader in their planning and risk management.

4.10 Category 2b educational visits submission to the Outdoor Education Adviser is required **four working weeks** before the departure date. This is to allow any recommendations to be considered and implemented. Forms will be considered after this 4 week period but a response cannot be guaranteed. Advice may also be sought well in advance if a visit and/or journey is particularly complex for any reason. Notification forms may be submitted via E Visits or the email address: [Ed.visits@shropshire.gov.uk](mailto:Ed.visits@shropshire.gov.uk)

4.11 Duke of Edinburgh Award Expedition. This guidance applies to DofE training and assessed expeditions and practice walks. Forms A, C (and D and G, as relevant) and route information clearly marked on a map to be submitted to the Outdoor Education Adviser **six working weeks** before the departure date. This is to allow any recommendations to be considered and implemented. Forms will be considered after this 6 week period but a response cannot be guaranteed. Notification forms may be submitted via E Visits or the email address: [Ed.Visits@shropshire.gov.uk](mailto:Ed.Visits@shropshire.gov.uk).

#### 4.12 Notification of Educational Visits and/or Journeys Summary



## 5. Monitoring

5.1 Schools and other education settings should ensure that there is sample monitoring of educational visits and learning outside the classroom activities undertaken. Such monitoring should be in keeping with the recommendations of OEAP National Guidance. There is a clear expectation that the monitoring function is a delegated task to the School/Establishment, principally carried out through systems put in place by the EVC.

5.2 Shropshire Council will monitor through the notification process.

Refer to OEAP National Guidance document: 3.2b **Monitoring** for further details.

## 6. Induction, training, apprenticeship and succession planning

Shropshire Council offers training to assist educational establishments in discharging their duties with regards to educational visits and journeys, as follows:-

**6.1 Educational Visits Co-ordinator:** ALL EVCs must hold a current EVC training certificate (valid for 3 years). Shropshire Council provide 6 hour OEAP accredited initial and revalidation training for Educational Visits Coordinators as part of the core package. Also provided are termly Network Meetings for Educational Visits Coordinators as part of the core package. A certificate is issued by Shropshire Council and a record of EVC course attendance is kept.

**6.2 Visit Leader Training:** OEAP accredited Visit Leader Training (Theory and Practical) is offered by Shropshire Council as a recommended option for EVCs and staff leading and/or taking a key role on an Educational Visit.

**6.3 Management of Visit Emergencies:** Shropshire Council also offers the OEAP accredited Management of Visit Emergencies (MOVE) 3 hour scenario based course for EVCs and Managers. This is an expanded section of the EVC Training course.

**6.4 Endorsement of Visit Leaders:** OEAP National Guidance provides clear advice regarding the assessment of Visit Leader competence. It is an expectation as part of this guidance that all leaders and their assistants have been formally assessed as competent to undertake the responsibilities of leading the educational visit or learning outside the classroom activity. To be deemed competent, a Visit / Activity Leader, or Assistant Leader must be able to demonstrate the ability to operate to the current standards of recognised good practice for that role. All staff and helpers must be competent to carry out their defined roles and responsibilities. The OEAP Education Visit Leader course attendance is an indicator of competence (see section 3). OEAP National Guidance sets a clear standard to which leaders **must** work.

**6.5 Accompanying Staff:** Staff participating in educational visits and learning outside the classroom activities must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff.

**6.6 Volunteers:** Adults volunteering are required to follow the instructions of the Party Leader and the school staff and help with ensuring the health, welfare and safety of the children. They may be allocated a group to supervise and help but not be left in sole charge of the children. Where a Volunteer helper is a parent (or otherwise in a close relationship to a young person taking part in the visit) they should be aware of their roles and responsibilities with regards their own, and other children. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment. The Form G is provided to assist.

**6.7 Additional Outdoor Education Courses:** Additional and specific training courses are also provided to support Visit Leaders; examples include First Aid appropriate to Educational Visits, Water Margin Safety Management, Outdoor Leadership Awards (e.g., Lowland Leader), The John Muir Award, Outdoor Learning linked to curriculum delivery, and first hand data collection through field studies. School/establishment bespoke courses are also available on request and content can be adjusted to needs and time available.

**6.8 Apprenticeship model:** Competence is a combination of skills, knowledge, awareness, judgement, training and experience. It is not necessarily related to age or position within the establishment. It is situational – a leader who is competent in one activity or environment may not be so in another - and it involves breadth as well as depth. Relevant experience is not necessarily gained by repeating the same thing several times, but by experiencing a range of different activities and environments. Shadowing an experienced and competent Visit Leader, can develop accompanying staff in preparation to becoming the future Visit Leader themselves. By taking responsibility for less complex and lower risk visits first, skill sets can be developed and confidence built.

**6.9 Succession:** To avoid a visit becoming dependent on one individual succession planning is required. Planning for a visit should also include consideration of the possibility of the Visit Leader or an Activity Leader becoming incapacitated. An Assistant Leader can contribute to supervision, support the Visit Leader with agreed aspects of the visit and act as deputy for a Visit Leader. At the same time the Assistant Visit Leader will be developing their experience and competence for the future.

Refer to OEAP National Guidance document: 3.2d/4.4a **Approval of Leaders** and 4.3a **Good Practice Basics** for more details.

## 7. Risk management, risk-benefit assessment, ratios and effective supervision

7.1 Shropshire Council, as an employer has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level. This requires that suitable and sufficient risk management systems are in place, requiring the employer 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. Shropshire Council strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. HSE endorse this approach through their “**Principles of Sensible Risk Management**” and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

7.2 There is a requirement for the risk assessment process to be recorded in writing/electronically and for suitable and sufficient control measures to be identified for all significant risks i.e. those that may cause serious harm to individuals. Form C is provided for this purpose and has two styles of risk assessment which a Visit Leader may choose from. ‘Form C with notes’ gives assistance with this process. When completing a risk assessment it is essential to focus on what is important, to keep this group of children, safe on this day, with these staff, doing this activity - be specific and avoid over generalisation. The risk assessment must include the safety of staff, volunteers and members of the public. The risk assessment shows the Visit Leader’s thinking and then informs the ‘how’ the visit is going to be managed safely, which can then be shared.

7.3 Risk assessment is included in both the EVC, Visit Leader and MOVE training and regularly included in EVC Network Meetings. Shropshire Council Health and Safety Team also provide training in managing risk.

7.4 School/establishment risk assessments are required with the submission of a Form A. Risk assessments from a Provider are not required, evidence of their management of risk can be shown through their Safety Management Statement and relevant accreditation e.g. the Learning Outside the Classroom Badge, Schools Travel Forum or the Adventure Activities Licence. If no recognisable accreditation is available please request the completion of a Form D – ‘External Providers Declaration’

7.5 **Ratios and effective supervision** Schools and establishments must ensure that the staffing of visits enables leaders to supervise young people effectively. Decisions about the staffing and supervision should take into account:

- The nature and duration of the visit and the planned activities.
- The location and environment in which the activity is to take place
- The nature of the group, including the number of young people and their age, level of development, gender, ability and needs (behavioural, medical, emotional and educational).
- Staff competence.



- The consequence of a member of staff being indisposed, particularly where they will be the sole leader with a group for any significant time.

7.6 Staffing ratios are a risk management issue and should be determined through the process of risk assessment. It is not possible to set down definitive staff/participant ratios for a particular age group or activity.

7.7 Shropshire Council require the staffing ratio to young people sufficient to ensure effective supervision and taking into account:

- The nature of the activity (including its duration).
- The location and environment in which the activity is to take place.
- The age and gender (including developmental age) of the young people to be supervised.
- The ability of the young people (including their behavioural, medical, emotional and educational needs).
- Staff competence.

7.8 Shropshire Council provide the following ratios of staff: young people for guidance with staff numbers capable of being decreased if the risk assessment supports it. (The term 'staff' here includes all competent adults provided by the school / establishment).

- Nursery: **1:2**
- Reception: **1:4**
- School years 1 - 3, **1:6** (overnight minimum **1:8**)
- School years 4 - 6, **1:15** (overnight minimum **1:10**)
- School years 7 onwards, **1:15** (overnight minimum **1:10**)

7.9 When planning a repeat visit or a series of activities, it is important to review the previous plan (no matter how well it worked in the past) so as to ensure that it meets current group needs and any other changes (e.g. time of year and experience level of the staff).

Refer to OEAP National Guidance documents: 4.3c **Risk Management – an overview**, 4.3f ***Risk Management – some practical advice*** 4.3g **Risk Management- what to record and how** and 4.3b **Ratios and Effective Supervision**. 4.2a **Group management and Supervision**

## 8. Assessing venues and providers

8.1 Where possible, an exploratory visit will give the party leader greater confidence in their ability to supervise the pupils. It will help the party leader to concentrate on the needs of the group as well as the unexpected demands of the environment. The aim of the exploratory visit is to:

- ensure that the venue is suitable to meet the aims and objectives of the visit
- undertake a full appraisal of learning opportunities and experiences
- identify what facilities are available and what the leader will need to provide
- establish the level of care and supervision which will be required
- identify any special problems or hazards and the organisation and expertise required to cope with them
- establish what information the provider will need and by when
- Consider what alternative activities are available if those planned could be adversely affected by weather or other changes.

8.2 If a visit is impractical the same information needs to be gathered by other means – from the venue or provider, previous visit leaders, other users and local information sources.

8.3 Use the Form 16D as a guide to selecting a provider and/or accommodation but take advantage of established national approval schemes such as:-

- Learning Outside the Classroom Badge
  - Adventure Activities Licence
  - Schools Travel Forum
- (See Shropshire Council resource 'Know your Badges')

8.4 For providers who do not hold external accreditation, please see Form D External Providers Declaration which is a pre-visit questionnaire to assist with gaining information to make an approval decision.

8.5 You should **not** ask for copies of providers' risk assessments but should seek any information specifically aimed at helping Visit Leaders to manage their visit and complete the school/establishment risk assessment, such as a Safety Management Statement or information for specifically written for visit Leaders.

Refer to OEAP National Guidance document: 4.4h **Using external providers and facilities** and 4.4f **Assessing an adventure activity provider**.

## 9. Volunteers

9.1 If your establishment uses volunteers, then your policy should address the following;

- The vetting procedures for volunteers, including when an enhanced DBS check is required.
- The minimum induction and training procedures for volunteers.
- Under what circumstances (if any) volunteers may act as Visit Leaders or their assistants. If volunteers are allowed to act as Visit Leaders, they must be accountable. This implies that they have been engaged through a thorough recruitment process that includes vetting and induction into the establishment's policies and procedures.
- How volunteers are assessed as competent to carry out their assigned role.
- Requirements for supervision of volunteers.

9.2 The Form G is provided for use with volunteers, and you will need to ensure you collect any relevant medical needs and/or dietary requirements.

Refer to OEAP National Guidance document: 3.4 **Volunteers**

## 10. Emergency procedures and incident reporting

10.1 Schools and Establishments need to have an emergency response plan that covers what to do if there is an incident away from school. Or if there is an incident at base that the Visit Leader may find affects the visit currently taking place off site.

10.2 For the purposes of these procedures, examples of an emergency might be:

- an accident leading to a fatality or other serious injury;
- circumstances in which a party member is/might be seriously at risk;
- serious illness;
- any situation in which the press or other media are, or might be involved;
- significant delays that need to be communicated to parents/others

It should be noted, however, that it is not possible to give a definitive list of what might constitute an emergency. Visit Leaders should consider any unexpected event and decide whether or not the circumstances amount to an emergency and whether the emergency procedures should be followed.

10.3 The establishment policy should explain the visit emergency procedures, including any procedures or support provided by the employer. This should include nominating suitable people to provide 24/7 cover at base during a visit; these contacts need to be competent to fulfil this role. The Emergency Contact(s) should have 24/7 access to all details of the visit, including medical and next-of-kin information for staff and young people.

10.4 The School/establishment policy should also refer to the establishment's or employer's procedures for incident reporting. EVCs are encouraged to share their experiences as 'Lessons Learned' in Network Meetings to inform the policies and practice of other schools and establishments in the Shropshire Community.

10.5 Shropshire Council has a Risk and Business Continuity Team who will advise on School Incident Planning which includes Educational Visits.

10.6 Depending on the nature and seriousness of the emergency, a response to media interest may be required. Shropshire Council is ready to handle enquiries from the media, but direct contact between the media and school personnel is also very likely. Consideration needs to be given to who amongst the staff, and/or the Governing Body is to act as spokesperson in dealing with the media; this is likely to include the Headteacher, but may need to include others. Shropshire Council support is available in responding to media enquiries (with the involvement of the Communications Unit), please contact: [communications@shropshire.gov.uk](mailto:communications@shropshire.gov.uk).

Refer to OEAP National Guidance documents 4.1h **Avoiding Accidents and Emergencies** 4.1i **Emergencies and Critical Incidents – An Overview** 4.1k **Visit Leader Emergency Checklist** | 4.1j **Off-Site Visit Emergencies: The Role of School Governors**, **4.1l / 8.1l Visit Leader Emergency Action Card – amendable version**

## 11. Behaviour

11.1 The school/establishment policy should encourage the use of codes of behavioural conduct as a means of establishing appropriate expectations of young persons' behaviour. Such codes should be explained to young people and parents before a visit, so reducing the opportunity for misunderstanding of both expectations and the sanctions that may be invoked where the code is breached.

11.2 The policy should address the following:

- Do young people sign up to a "behavioural contract" for all residential visits?
- Do parents also sign and accept responsibility for removing young people in prescribed circumstances?
- What are the expectations for discipline and sanctions on visits?
- Any specific establishment rules relevant to visits (e.g. whether children are allowed to bring mobile phones or other electronic devices).

11.3 Careful consideration should be given to pupils whose behaviour is likely to pose a serious risk to themselves or others on a visit. An individual risk assessment may be required and a balanced and reasoned decision reached as to whether control measures are suitable and sufficient to enable the young person to take part in the educational visit.

Refer to OEAP National Guidance documents 8i **Model Code of Conduct** for more details.

## **12. Inclusion**

12.1 Every effort should be made to ensure that school journeys and activities are available and accessible to all who wish to participate irrespective of disability, special educational or medical needs, ethnic origin, sex, religion etc.

12.2 All young people should be encouraged to participate in as wide a range of activities as possible. If a visit is to cater for pupils with particular needs, a suitable venue should be selected and in some cases additional supervision, resources or support may be needed or activities adapted. An individual risk assessment may be appropriate. Visit Leaders are responsible for ensuring a Provider is fully informed of all relevant information including medical, emotional, dietary including allergens, and behavioural to enable them to fulfil their duty of care.

12.3 Early discussion with all parties concerned including parents about what is needed will enable plans to be drawn up to meet these needs in most situations. These should enable the child/young person to take part safely and benefit from the visit.

12.4 Your Establishment Visits Policy should endorse these principles:

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

12.5 It is unlawful to:

- Treat a disabled young person less favourably.
- Fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage **without justification**.
- 

Expectations of staff must be reasonable, so that what is required of them (to include a given young person) is within their competence and is reasonable.

Refer to OEAP National Guidance documents **3.2e Inclusion**

## 13. Insurance

13.1 The Visit Leader must ensure, well before the group departs, that adequate insurance arrangements are in place. Insurance may be arranged through, for example, the LA, a travel firm or the organisation to be visited as well as direct with an insurance company.

13.2 The Visit Leader should inform the parents of the scope of any insurance cover the school is to arrange. It is advisable to make copies of the insurance schedule available to parents as early as possible in the booking process.

13.3 Insurance policies are legal documents. They will impose conditions, limit the cover, and exclude certain people or activities. For any insurance enquiries please contact Shropshire Council Insurance Services on Tel no 01743 252092 or email: [Insuranceservices@shropshire.gov.uk](mailto:Insuranceservices@shropshire.gov.uk). They can offer assistance on types of insurance necessary as well as providing full details of the Schools' Travel Insurance Scheme run by the authority. The following **are examples** of cover which may be appropriate to many types of school visit:

- public liability;
- personal accident cover for teachers, other adults and pupils;
- costs of medical treatment;
- specialised risk activities (often excluded from standard policies) and the costs of evacuation for medical reasons when abroad;
- damage to or loss of hired equipment (check the wording of the hire agreement);
- programmed and non-programmed activities;
- transport and accommodation expenses in case of emergency;
- compensation against cancellation or delay;
- compensation for loss of baggage and personal effects including money;
- legal assistance in the recovery of claims; or
- Failure or bankruptcy of the centre or travel company.

13.4 Additional arrangements may be necessary to obtain insurance cover for activities abroad and activities of a potentially hazardous nature. The party leader should scrutinise carefully the list of exclusions in the policy. If there is any doubt about the cover the provider of the insurance should be asked for clarification.

13.5 The Visit Leader must ascertain the details of the insurance held by the tour operator together with confirmation of their membership of ABTA/ATOL or the

appropriate trade organisation.

13.6 Additional cover may be necessary for participants with certain known medical conditions. The party leader should check this with the insurance company before departure.

13.7 Cancellation/curtailment of the trip is usually covered by travel insurance. The reason for cancellation will determine whether a refund is available under the insurance policy. Limits will apply within a policy.

13.8 When hiring coaches etc. the party leader should check that the company used has appropriate insurance both in terms of motor vehicle insurance and public liability insurance.

13.9 The party leader should check that the insurance policy for the school minibus is appropriate to the journey. Taking the school minibus abroad may require extra insurance.

13.10 The School/establishment must check that the drivers of the school minibus abroad are appropriately licensed for the countries to be visited or passed through en-route.

13.11 Where the transport arrangements for a particular visit or journey are to involve the use of privately owned motor vehicles the party leader must obtain confirmation from the vehicle owner that it is fully and appropriately insured, particularly in respect of passenger liability and for use on the school business which the vehicle is to be put on that occasion. (Note: Where a vehicle is insured in the name of a spouse or relation “business use” cover may not extend to the driver concerned – only the policy holder). If there is any doubt the owner concerned must check with his/her insurance company so that the required confirmation can be obtained. It is good practice for the school to request and retain a copy of the valid insurance certificate.

#### 13.12 **Shropshire Council Insurance Cover: Third Party Policy**

The Council insures against its own legal liability for injury or damage that might arise as a result of negligence. The policy carried is known as a ‘third party liability policy’ or public liability insurance.

- The policy covers the Council for claims from third party persons (including from pupils and students), it extends to indemnify governors, employees and voluntary helpers carrying out the business of the Council.
- The policy does not cover liability arising from the use of mechanically propelled vehicles as this is more appropriately covered by motor vehicle insurance.

- Teachers on out of school activities are provided with some personal accident cover under Shropshire Schools' Travel Insurance Scheme if your school has opted to purchase this cover.

### 13.13 Insurance Cover NOT PROVIDED by Shropshire Council

Whilst not provided as a matter of course for schools/establishments, personal accident cover for pupils and staff is provided as part of Shropshire's Schools' Travel Insurance Scheme which schools can opt into, by means of an annual fee, to cover all their off-site needs whether these be journeys or visits or other activities (including visits abroad). This insurance is a full travel insurance and details can be obtained from the Insurance Team, please contact email: [Insuranceservices@shropshire.gov.uk](mailto:Insuranceservices@shropshire.gov.uk)

13.14 The taking out of additional insurance cover for pupils is a matter for schools themselves to determine **except** for trips abroad where fully comprehensive travel insurance - combined medical, journey, personal accident and public liability etc. insurance **must be** taken out.

### 13.15 Is there anything which may invalidate the council's insurance?

In relation to Shropshire's third party policy the Insurers will expect proper and reasonable arrangements to have been made for the visit. All risk assessments and other supporting documentation must be kept and retained in case required for a claim.

13.16 Not all schools buy into Shropshire's Insurance cover, you **must** check your own school's cover insurance arrangements. Deliberately ignoring the LA's advice given in this guidance or elsewhere may compromise the insurance cover arrangements. Refer to OEAP National Guidance 4.4c **Insurance** for more details.

## 14. Finance

14.1 Local Authorities, maintained schools and academies (including free schools, studio schools and University Technical Colleges) must take account of the law relating to charging for school activities, as set out in sections 449 to 462 of the Education Act 1996.

14.2 No charges may be made unless the governing body of the school or local authority has drawn up a charging policy giving details of the optional extras or board and lodging that they intend to charge for, and a remissions policy.

14.3 Schools and local authorities **must not** charge for:

- Education provided during school hours.
- Education provided outside school hours if it is part of the National Curriculum, or part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school, or part of religious education.



- Transport provided in connection with any educational visit of this type.
- Supply teachers to cover for teachers who are away from school on a visit.
- It should be noted that 'part of the National Curriculum' is not restricted to learning outside the classroom experiences that are specifically subject based but includes, for example, activities designed to fulfil requirements under the National Curriculum 'inclusion statement'.

14.4 Schools and local authorities **may** charge for optional extras, which include:

- Education provided outside of school time that is not:
  - Part of the National Curriculum.
  - Part of a syllabus for a prescribed public examination that the pupil is being prepared for at the school.
  - Part of religious education.
- Board and lodging for a pupil on a residential visit, except to parents in receipt of certain benefits (broadly equivalent to those that qualify children for Free School Meals).
- Extended day services offered to pupils (e.g. activity clubs).

14.5 The Visit Leader should ensure that parents have early written information about the costs of the visit, how much will come from school funds and how much each parent will be charged or asked to contribute. Parents should be given enough time to prepare financially for the visit. It will be useful to break the costs down into subheads such as travel, hostel/accommodation, meals etc. This is essential for residential visits in term time to show clearly the elements for which a charge may be made against those for which a voluntary contribution only may be sought.

14.6 The Headteacher/Manager should ensure that banking arrangements are in place to separate the visit's receipts from other school funds and from private accounts.

14.7 The Headteacher/Manager or party leader should reach a pre-agreement with parents on whether any funds left surplus after the visit will be returned to the parents concerned or retained by the school to be used for another visit(s).

14.8 The Headteacher should obtain the parents' agreement to meet the costs of an optional extra visit before the visit is planned in detail. Charging parents for an optional extra visit must not include an element of subsidy in respect of other pupils whose families do not meet the full charge.

14.9 Government guidance on charging for school activities is available at the following website. This includes details of the benefits which exempt parents from being charged for board and lodging: <https://www.gov.uk/government/publications/charging-for-school-activities>

Please refer to OEAP National Guidance 3.2c **Charging for School Activities**

## 15. Key staff Contact details

### **Dave Thorley**

Outdoor Education Adviser (OEAP Accredited)  
Shropshire Council  
1st Floor, Shirehall, Abbey Foregate, Shrewsbury, Shropshire, SY26ND.  
Tel: 01743 254485  
Mobile: 07970909252  
Email: [dave.thorley@shropshire.gov.uk](mailto:dave.thorley@shropshire.gov.uk) or [Ed.visits@shropshire.gov.uk](mailto:Ed.visits@shropshire.gov.uk)

### **Jane Cooper**

Risk & Business Continuity Team Leader  
Risk, Insurance & Resilience Team  
Shropshire Council, Abbey Foregate, Shrewsbury SY2 6ND  
Tel: 01743 252851  
Email: [jane.cooper@shropshire.gov.uk](mailto:jane.cooper@shropshire.gov.uk)

### **Carol Fox**

Occupational Health, Safety & ICT Approvals Manager  
Workforce & Transformation Shropshire Council.  
Shirehall, Abbey Foregate, Shrewsbury, Shropshire, SY26ND.  
Tel: 01743 252814  
Email: [carol.fox@shropshire.gov.uk](mailto:carol.fox@shropshire.gov.uk)

### **Rob Earll**

Educational and Offsite Visits/ E Visits System Administrator  
Shropshire Council  
1st Floor, Shirehall, Abbey Foregate, Shrewsbury, Shropshire, SY26ND.  
Tel: 01743 254492  
Email: [rob.earll@shropshire.gov.uk](mailto:rob.earll@shropshire.gov.uk) or [Ed.visits@shropshire.gov.uk](mailto:Ed.visits@shropshire.gov.uk)

### Schools Insurance Enquiries

Shropshire Council, Shirehall, Abbey Foregate, Shrewsbury, Shropshire, SY26ND.  
Tel: 01743 252092 Email: [Insuranceservices@shropshire.gov.uk](mailto:Insuranceservices@shropshire.gov.uk)

### Corporate Communications Manager

Shropshire Council, Shirehall, Abbey Foregate, Shrewsbury, Shropshire, SY26ND.  
Tel 01743 252826  
Email: [communications@shropshire.gov.uk](mailto:communications@shropshire.gov.uk)

## 16. Educational Visit Forms

- **Form 16A:** Application for the approval and notification of an educational visit
- **Form 16B:** Checklist to plan their visit
- **Form 16C:** Risk Benefit Assessment to cover educational value, foreseeable risks and suitable and sufficient control to manage the risks identified. There may be a need to include personalised RBA for anyone for whom the visit may pose a specific and unique risk. Form C with notes gives an explanation on how to complete a Risk Benefit Assessment.
- **Form 16D:** External Provider Declaration
- **Form 16E:** Parental consent form for a specific school visit.
- **Form 16F:** Emergency contact information
- **Form 16G:** Formal agreement for the provision of pastoral support by Volunteer Supervisory Adults during Educational Visits
- **Form 16H:** Evaluation of Visit

### E Visits

The E Visit system has been created by the Outdoor Education Advisers Panel. Shropshire Council have purchased the system to enable maintained schools, academies and other organisations to manage their education visits with an electronic system.

E Visit is an online system that works independently of any school or Shropshire Council system. Shropshire Council, along with the Outdoor Education Adviser and Administrator are responsible for the day to day management of the system, backed up by technical support from the developers QES. It is GDPR compliant and certified.

All Shropshire schools and other schools/organisation within the Shropshire Educational Visits Service Level agreement have been added to the system. Once the Educational Visit Coordinator (EVC) and Establishment Administrator have been identified, and training has taken place the school/organisation will have the option to be made live on the system.

All visits are stored on the system and can be viewed by the EVC and Head Teacher at draft and completed stage. This is an audit tool to view all visits taking place in the establishment, which can be used by the school and the employer, including in the event of an emergency.

E Visits should reduce the amount of paperwork associated with visits. Some documents will still be required depending on School's own policies and to provide further detail.