



**PENK VALLEY  
ACADEMY TRUST**

# ***Educational Visits Policy***

**Approved by Audit Finance & Risk Committee Summer 2024**

**Ratified by Board of Trustees: July 2024**

Frequency of Review: 3 years

Author: Chief Operating Officer

Policy based on LEA Educational Visits Policy and National Guidance (NG) (<http://oeapng.info>)

## Amendments

2016 – DS/HJ/NF/JA/PF Federation SLT 17/02/2017

2017 – TP – SJFS added

2018 – TP – amended for PVAT & new insurance policy details

2021 – PF – checked and updated including provision for Covid-safe educational visits

### ***Policy Statement***

Penk Valley Academy Trust acknowledges the many benefits of learning outside the classroom and is committed to supporting educational visits and activities that enrich the learning opportunities of all children and young people.

This document sets out the Academy Trust's policy on managing off-site activity and learning outside the classroom. This policy applies to all schools within the Penk Valley Academy Trust and must be adhered to by all its employees.

### ***Scope and Remit***

This policy applies to all Academy Trust employees, regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

### **1. Provision of Employer Guidance**

The Academy Trust follows the guidelines issued by the National Guidance (NG) (<http://oeapng.info>)

Where the Academy Trust employee commissions a Learning outside the classroom (LOtC) activity, they must ensure that such a commissioned agent has either:

1. adopted NG
- or**
2. have systems and procedures in place where the standards are not less than those required by NG

**and** all commission agents required to have their own Educational Visits Policy.

### **2. Ensuring Understanding of Basic Requirements**

As an employer, Penk Valley Academy Trust will ensure that its employees are provided with:

- Appropriate guidance relating to visits and LOtC activity;
- 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.

Each school's EVC officer will support staff in preparing for an Educational Visit, and ensure all necessary documentation/risk assessments and permissions are properly administered.

### **3. Approval and Notification of Activities and Visits**

Employees must follow guidance included in this policy which include where responsibilities and functions are delegated. All Academy Trust schools utilise the on line EVOLVE system developed by Staffordshire County Council.

A key feature of this system is that visits and LOtC activities requiring approval e.g. residential or adventurous activities are automatically brought to the attention of the Local Authority (LA), where their approval is required.

Those visits and activities not requiring LA approval may be viewed, sampled or monitored using the database and diary facilities of the system. For further assistance/guidance is available from the LA's Educational Visit support team.

#### **4. Risk Management**

Where LA approval is required, a visit forms should be submitted onto EVOLVE between four to six working weeks before a visit is set to take place. Approval notification will be sent out as soon as possible, or up to two working weeks after receipt of the visit form for more complex/LA approved trips.

The Academy Trust 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. The Penk Valley Academy Trust seeks additional guidance/support from ‘Staffordshire’, including training, exemplar risk assessments and resources.

The Penk Valley Academy Trust has the following expectations in relation to risk assessments:

- All Risk Assessments are prepared in advance of the visit by the Visit Leader and reviewed by the EV Co-ordinator and Headteacher
- Training will be provided via the EVC in relation to risk assessments and risk-benefit assessment
- Generic risk assessments from both the school and visit establishment will be utilised where appropriate
- Staffing ratios will also be determined depending upon the age range of students and activity type
- Transport arrangements will be properly vetted
- Specific local hazards will be assessed (ego waterways, busy roads etc)
- The level of risk associated with a large-scale situation such as the recent Covid-19 pandemic in the area of the visit should be assessed regularly up until the day of the visit. Guidance relating to any crisis or large-scale situation can be viewed in the LA's Educational Visits Guidance document (available on Evolve from the schools EVC). Furthermore, OEAP National Guidance document is regularly updated on their website (<https://oeapng.info/8723-coronavirus-4/>)

#### **5. Emergency Planning and Critical Incident Support**

A critical incident is an incident where any member of a group undertaking an off-site activity has:

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

The Penk Valley Academy Trust has the following procedures in place:

- A duplicate visit file is held at the school for reference
- A dedicated member of leadership is nominated by the school to support the Visit Leader outside of the school day as main contact
- A “what to do in the event of an emergency”.
- If an incident occurs, information is collated as part of the evaluation process undertaken after every visit.

The emergency contact phone number for Staffordshire County Council outside office hours is 00-44-1785-278499 or 00-44-8451-213322. This is the number for Staffordshire Fire & Rescue

Service Fire Control and it will be answered by a Control Operator. Upon connection, please provide the Operator with your name, a contact number and a brief outline of what has happened. Then ask the Control Operator to page the CCU Duty Officer and to pass this information in full onto him/her. **Please note that calls to the numbers above are to be used only in extreme circumstances, such as serious injuries and/or fatalities and should only be called by a senior member of school staff, the visit leader or the school's EVC. This is because if the incident has reached that level it would also be classed as a safeguarding incident and Staffordshire County Council still have a duty of care to all pupils in their authority area in regards to safeguarding.**

These numbers should be carried by leaders at all times during an off-site activity.

Under no circumstances should these numbers be given to young people or to their parents or guardians.

## **6. Monitoring**

Penk Valley Academy Trust monitors visits by following the processes detailed below:

The EVC will:

- Ensure that there are establishment procedures for visits
- Lead, or be involved with, the approval of leaders
- Organise training and induction of Visit/Activity Leaders and Assistant Leaders.
- Ensure that there are administrative audit trails.
- Ensure that systems and procedures are reviewed.
- An annual report detailing visits which have taken place, number of children involved and any incidents are recorded and reported to governors

Any visits involving residential or physical activities such as skiing will be subject to further scrutiny by the Leadership within the school, with the Visit Leader being approved by Leadership and appropriate training arranged where necessary.

## **7. Role-specific Requirements and Recommendations**

**The Headteacher/Principal:**

- The Visit Leader will discuss with the EVC, and Headteacher if required, and potential risks and what measures have been put into place.
- The Headteacher/Principal will approve all Educational Visits prior to any correspondence being issued

**Visit Leader will:**

- be confident and competent in following the Academy Trust procedures and have an awareness of what the visit will entail.
- have overall responsibility for supervision and conduct of the visit.
- be a single individual who will be appointed to ensure accountability
- review and adapt risk assessments in keeping with the activity and the students going.

**Activity Leader will:**

- be responsible for specific and specified activities if applicable and report to/support the Visit Leader

**Helpers/Volunteers including parents will be:**

- subject to appropriate vetting and used appropriately
- informed of objectives of the trip and briefed on procedures

- briefed on procedures
- informed as to what their role is, and how to integrate with other staff
- able to contribute towards the trip evaluation
- informed of behavioural expectations and sanctions.

### **8. Assessment of Leader Competence**

The Penk Valley Academy Trust has a process to induct staff into becoming Visit Leaders as part of each school's internal processes. We do this in the following ways:

- Line managers oversee EV arrangements
- Leadership provide support and act as main point of contact during visit
- The EVC provides any support relating to the procedural elements e.g. pupil ratios/letters of consent etc.
- External training on how to be a Visit Leader is available

### **9. Charges for Off-Site Activities and Visits**

Charges are made in line with the Academy Trust Charges and Remissions Policy.

All Penk Valley Academy Trust visit/trip letters will contain the following sentence:

This is a visit for which by law we are unable to make a charge. However, the visit cannot take place unless we ask for a voluntary contribution of £X per student towards the cost of the following chargeable elements of the visit, i.e.: transport, admission fees etc. In the event of the contribution not meeting the costs of the visit then this visit will not be able to take place.

### **10. Vetting and DRB checks**

Penk Valley Academy Trust follows the guidelines relating to DBS checks for all staff. Volunteers if used frequently are also subjected to DBS clearance.

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

### **11. Requirements to Ensure Effective Supervision**

Activity and Visit Leaders must ensure that young people are supervised in accordance with the principles of "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'.

Effective supervision should be determined by a 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

As an exception to the above Ofsted and DfE guidance prescribe ratios for Early Years.

## **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 young people. It is a vital dimension of risk management.

As the Penk Valley Academy Trust, a preliminary visit would be required in the following instances:

- Skiing trip
- Dangerous activities' where additional risk assessments would be required

Schools' within Penk Valley Academy Trust encourage 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:

- Learning Outside the Classroom (LOtC) Quality Badge
- Adventure Activities Licensing Service (AALS) licensing
- Adventuremark
- National governing body (NGB) centre approval schemes (applicable where the provision is a single, specialist activity).

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

## **13. Insurance for Off-site Activities and Visits**

Employer's Liability insurance is a statutory requirement and Penk Valley Academy Trust holds a Staffordshire County Council policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it where negligence attaches. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. Staffordshire 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 attaches. Employees (as agents of the employer) are indemnified against all such claims, as are all voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities such as off-site activities and visits organised by all establishments and settings for which the employer is responsible.

Limited Personal Accident insurance is provided for all Staffordshire employees in the course of their employment, providing predetermined benefits in the event of an accident in respect of qualifying injuries. However, Visit Leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

The Penk Valley Academy Trust also subscribes to the Department for Education's Risk Protection Arrangement (RPA) membership which is open to Academies.

When providers are used it is a requirement for them to hold Public Liability insurance cover with a minimum limit of indemnity of £5M.

## Claims procedure

**TopMark Claims Management Ltd handle RPA claims on behalf of the Department for Education. TopMark Claims** should be notified as soon as reasonably practicable after the event that a claim is to be made. Claims are to be notified to:

All claims are to be submitted via the TopMark Claims Management website - <https://www.rpaclaimforms.co.uk/make-a-claimv2/>

Emergencies and urgent incidents (excluding overseas travel)

Email: [rpa@topmarkcms.com](mailto:rpa@topmarkcms.com)

Phone: 03300 585566

24-hour Travel Emergency - Select Option 1

Business Interruption Emergency (such as Fire, Flood or Storm Damage) - Select Option 2

Overseas travel emergencies and incident claims

Phone: 020 3475 5031

Enquiries Relating to Cover Provided

Phone: 0117 976 9361

Email: [rpaAdvice@willistowerswatsonsecure.com](mailto:rpaAdvice@willistowerswatsonsecure.com)

Access to the RPA cover helpdesk is available 9.00 to 17.00 Monday to Friday excluding bank holidays.

## 14. Inclusion

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, financial status, gender or religion. If a visit needs to cater for young 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.

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

- An entitlement to participate
- Accessibility through direct or realistic adaptation or modification
- Integration through participation with peers

## 15. Good Practice Requirements

To be deemed competent, a Visit Leader, or Assistant Visit 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.

NG sets a clear standard to employees are expected to follow. The guidance states:

*'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 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 establishment procedures supported by a structured induction process specified by the 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 off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities which 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. Establishments should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies.

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 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-benefit assessment.

Similarly, it is good practice for the home contact not to be related to (or otherwise in a close relationship to) any of the young people or staff taking part in the visit.

## **16. Transport**

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and establishments **must** follow the specialist guidance provided in Staffordshire'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 if hired from a reputable company with all safeguarding and vetting procedures in place with the company.

Transporting young people in private cars requires careful consideration. Any proposals to do so should be consulted upon with the Chief Operating Officer in advance to ensure that the correct insurance and risk assessments are in place.

## **17. Planning and Evaluation**

Planning should reflect the consideration of legal and good practice requirements, ensuring:

- The plan is based on establishment procedures and employer guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).



- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

### **18. Accident Reporting**

All accidents that involve anyone – employees, pupils, service users, contractors or members of the public – on County Council premises or anywhere else when engaged in County Council activities are to be handled in line with 'Staffordshire's' Accident Policy. Accident investigation and employee hazard report forms are available from the PVF Health and Safety Co-ordinator, along alongside other relevant policies and useful information available on the SLN. A copy of any County Accident Forms (HSF40) submitted to the Strategic Health and Safety Service should be attached to the visit form on EVOLVE.

### **POLICY REVIEW**

This policy will be reviewed every 3 years, or before if deemed if, by the Penk Valley Academy Trust Board of Trustees.