



## Educational Visits Policy

### Policy Statement

Staffordshire County Council ('Staffordshire') 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.

'Staffordshire' is indebted to leaders who have enriched the education of past generations of pupils and students and to those who will continue this valuable work.

This document sets out the 'Staffordshire' policy on managing off-site activity and learning outside the classroom.

### 1. Provision of Employer Guidance

Staffordshire County Council has formally adopted Outdoor Education Advisers' Panel 'Employer Guidance' (EG) as its guidance for the management of off-site visits and learning outside of the classroom (LOtC). This guidance can be found on the following web site:

<http://oeapeg.info/>

It is a legal expectation that employees **must** work within the requirements of their employer's guidance; therefore 'Staffordshire's' employees must follow the requirements of EG, as well as the requirements of this policy statement.

Where another employer (such as the governing body of a voluntary aided school) wishes to opt into 'Staffordshire' guidance, systems and processes for supporting and monitoring LOtC, they should produce a policy statement that makes this clear.

Where a 'Staffordshire' employee commissions LOtC activity, they must ensure that such a commissioned agent has either:

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

Establishments are required to have their own Visits Policy. For further information and guidance please refer to the EG document [How to Write an Establishment Visit Policy](#)

## **2. Scope and Remit**

The EG document [Status, Remit and Rationale](#) clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- Direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- Direct supervision of young people undertaking experiences that fall within the remit of Learning Outside of the Classroom;
- Facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;
- Deploying staff that will supervise or facilitate experiences of or for young people 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.

For a more expansive explanation of legal explanations, all users of the guidance are strongly recommended to read the EG document [Underpinning Legal Framework](#)

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

As an employer, 'Staffordshire' is required to 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.

The appropriate guidance for the management of outdoor learning and LOtC in Staffordshire is the Outdoor Education Adviser's Panel 'Employer Guidance' website, the address of which is given in section 1.

The relevant training courses in Staffordshire are:

- Staffordshire Educational Visits Coordinator (EVC) Training – all Staffordshire schools and SYPS establishments are required to have a current trained EVC in post. Currently there is no requirement for formal revalidation.
- Staffordshire Visit Leader Training – this course is strongly recommended for all those who lead LOtC activities.

For the purposes of day to day updating of information, Staffordshire EVCs and Visit Leaders are directed to the posting of updates (which include information on how to access the relevant courses) available on EVOLVE.

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their establishment's Educational Visits Coordinator (EVC) in the first instance. Further help and guidance can be obtained through the Educational Visits team who are best contacted by e-mail at [eva@staffordshire.gov.uk](mailto:eva@staffordshire.gov.uk). The nominated advisers in Staffordshire are Gill Cryer 07794331637 and Chris Dillon 07969097487.

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

Employer guidance **must** provide clarity on issues where responsibilities and functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities.

'Staffordshire' uses an online system (EVOLVE) for notification and approval. A key feature of this system is that visits and LOtC activities requiring approval are automatically brought to the attention of the Local Authority (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 'Staffordshire' schools and SYPS establishments use the EVOLVE system; for further advice and help using the system please use the information (i) buttons and help pages provided throughout the system. For further assistance please contact the Educational Visits team using the contact details given in Section 3.

Visit forms should be submitted **six working weeks** before a visit is set to take place, and **before anyone is financially committed**. Approval notification will be sent out as soon as possible up to two working weeks after receipt of the visit form.

## 5. Risk Management

As an employer, Staffordshire has a legal duty to ensure that risks are managed – requiring them to be reduced to an ‘acceptable’ or ‘tolerable’ level – and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring ‘Staffordshire’ 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. ‘Staffordshire’ 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. 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 young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal or ‘Staffordshire’ requirement to produce a risk assessment 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, Staffordshire EVC training ensures that establishments are supplied with an electronic portfolio of exemplar generic risk-benefit assessments, as well as exemplar event-specific assessments. These risk management materials can also be accessed through EVOLVE.

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

For further information please refer to EG document [Risk Management](#)

## 6. 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.

As an employer, 'Staffordshire' is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

For further information please refer to EG document [Critical Incident Management for Visits](#)

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. This provision is not for resolving matters such as lost passports, lost luggage and forgotten items such as medication.

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.

## **7. Monitoring**

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

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

EG provides clear advice regarding the assessment of leader competence. It is an expectation of 'Staffordshire' policy that all 'Staffordshire' leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with EG.

For further information please refer to EG document [Assessment of Competence](#)

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

EG sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within 'Staffordshire's' management structures.

For further information please refer to EG document [Requirements and Recommendations for Employers](#)

EG sets out clear and detailed responsibilities and functions of specific roles that relate to roles within most schools and SYPS establishments.

For further information please refer to EG document [Requirements and Recommendations for Establishments](#)

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

'Staffordshire' Heads and Managers, Curriculum Planners, EVCs and Visit Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449-462 of the Education Act 1996.

For further information please refer to EG document [Charges for Off-Site Activity](#)

## **11. Vetting and CRB checks**

'Staffordshire' 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 guidance:

- *Frequently* is defined as once a week or more
- *Intensively* is defined as four days or more or overnight

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 young people 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.

For further information please refer to EG document [Vetting and CRB Checks](#) and 'Staffordshire's' [Criminal Records Bureau Policy](#)

## **12. Requirements 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'.

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.

For further information please refer to EG documents:

[Ratios and Effective Supervision](#)

[Group Management and Supervision](#)

### **13. 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.

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

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

Visits to the 'Staffordshire' Outdoor Education Service centres do not require approval or notification as they are self-approving.

Visits that are the responsibility of 'Staffordshire' establishments will usually be staffed by at least one appropriate representative who will fulfil the role of leader. This will always apply to participants under 14 years. The exception to this is on the occasion when education for the 14-19 year old age range may be conducted for individuals or small groups by appropriate provider organisations without close supervision from a 'Staffordshire' leader. In order to ensure that the provider organisation is appropriate and both school/learner base and provider are fully aware of their responsibilities the school/learner base must apply the [Staffordshire 14-19 Protocols](#)

For further information please refer to EG document [Preliminary Visits and Provider Assurances](#)

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

Employer's Liability insurance is a statutory requirement and 'Staffordshire' holds a 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 optional School Journey scheme (not applicable for Academy schools who should refer to their own insurers) gives benefits that exceed those of most tour operators and provides a phone number giving rapid access to support and assistance in the event of a claim.



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

For further information please refer to EG document [Insurance](#)

For further information and advice on insurance matters please contact:

Insurance Manager  
Rachel Fox  
Finance and Resources  
Wedgwood Building  
Stafford  
ST16 2DH  
Tel 01785 276477  
E-mail [rachel.fox@staffordshire.gov.uk](mailto:rachel.fox@staffordshire.gov.uk)

## **15. 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, 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

For further information please refer to EG document [Inclusion](#)

## **16. Good Practice Requirements**

To be deemed competent, a Staffordshire 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.

EG sets a clear standard to which 'Staffordshire' leaders **must** work. 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 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. 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.

For further information please refer to EG document [Good Practice Basics](#)

## **17. 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 are hired from a reputable company.

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

Please refer to EG documents:

[Transport \(General Considerations\)](#)

[Transport \(Minibuses\)](#)

[Transport \(Private Cars\)](#)

Further information and advice is available from 'Staffordshire's' [Road Safety and Sustainable Travel](#) team.

## **18. 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.

The Ofsted report 'Learning Outside the Classroom – How Far Should You Go?' (October 2008) makes statements in the strongest terms to support the value of LOfC, including the fact that it raises achievement. 'Staffordshire' Heads, Managers, EVCs and Visit Leaders are recommended to familiarise themselves with the main content of this report.

For further information please refer to EG documents on [Policies, Planning and Evaluation](#)

## **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 [Health and Safety](#) intranet site alongside other relevant policies and useful information. 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.