



**Educational Trips and Visits Policy  
for the Management of Learning Outside the Classroom**

Date	October 2018
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Adopted by MAT Board	30 October 2018
Adopted by LAB	
Review Date	September 2019

## **The Hawksmoor Learning Trust**

### **Policy for the Management of Learning Outside the Classroom (LOtC)**

The Hawksmoor Learning Trust positively promotes the active involvement of all children and pupils in educational visits and journeys or 'learning outside the classroom' activities. Off-site activities have a great potential for enhancing the educational, personal and social development of children and pupils by enabling them to participate in experiences which are not available to them within the classroom or other education or childcare setting.

Every young person should experience the world beyond the classroom as an essential part of learning and personal development, whatever their age, ability or circumstances.

These are often the most memorable learning experiences, help us to make sense of the world around us by making links between feelings and learning. They allow us to transfer learning experienced outside the classroom and vice-versa.

The benefits of educational visits and outdoor education include the opportunity to:

- Enhance learning and raise achievement
- Develop independence
- Develop team work
- Extend, enrich and support the curriculum
- Develop resourcefulness
- Develop problem solving skills
- Face challenges
- Question values
- Raise confidence and self-esteem
- Develop social skills
- Appreciate the world at large and environmental awareness
- Extend personal horizons

The management of visits and off-site activities places particular responsibilities for the health, safety and welfare of all participants on the Local Academy Board, Head of School, the party leader, members of staff and volunteers, pupils and parents. The school also has responsibilities to other members of the public and to third parties. This policy on visits and off-site activities therefore complements the wider school health and safety policy.

It is a priority of the school that all visits and off-site activities are safe, well-managed and educationally beneficial.

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

The Hawksmoor Learning Trust has formally adopted "**LOtC National Guidance**" as "**Academy Trust Employer guidance**". This LOtC guidance can be found on the following web site:

**[www.lotc.org.uk/](http://www.lotc.org.uk/)**

It is a legal expectation that employees **must** work within the requirements of their employer's guidance; therefore employees working within THLT schools must follow the requirements of "LOtC Employer Guidance", as well as the requirements of this Policy Statement. THLT employees should also follow LOtC NG recommendations.

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

1. adopted **The Hawksmoor Learning Trust** or LOtC National Guidance

**or**

2. have systems and procedures in place where the standards are not less than those required by LOtC National Guidance.

## **2. Scope and Remit**

The LOtC NG document “**Basic Essentials MUST Read - Status and Remit**” 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 pupils undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of pupils undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for pupils undertaking experiences beyond the boundary of their normal operational base;
- deploying staff who will supervise or facilitate experiences of or for pupils 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 expectations, all users of the guidance are strongly recommended to read the LOtC NG document: “**Underpinning Legal Framework**”

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

As an employer, **The Hawksmoor Learning Trust** 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 **THLT schools** is the LOtC National Guidance web site.

**Each school within The Hawksmoor Learning Trust must have an appointed Educational Visits Co-ordinator who has undertaken the relevant training courses:**

1. Educational Visit Coordinator (EVC) Training
2. Educational Visit Coordinator (EVC) Revalidation
3. Visit Leader Training

For the purposes of day-to-day updating of information, the EVCs and Visit / Activity Leaders within THLT schools are directed to the posting of “*EVC Information Updates*” (which include information on how to access the relevant courses) available on the following web link:

[www.plumsun.com](http://www.plumsun.com)

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), or **Plumsun**.

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

The Hawksmoor Learning Trust delegates the responsibility for formal approval of all Visits and LOtC activity to establishment Headteachers. It is a requirement of this policy that Heads and Managers carry out this function in accordance with LOtC Employer Guidance and uses Plumsun systems and procedures as the external adviser.

Although approval is delegated, establishments must notify the advisor (Plumsun) of visits and activities falling within any one of the triggers set out below:

- involves a journey more than 50 miles away from base;
- involves a residential or overnight stay;
- involves the provision of an adventurous activity.

The Hawksmoor Learning Trust Schools use an online system for notification and approval with Plumsun. A key feature of this system is that visits and LOtC activities requiring approval are automatically brought to the attention of the Advisor. 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 THLT school establishments use the system; for further advice and help using the system, the establishment should contact the nominated adviser (see section 3)

#### 5. Risk Management

As an employer, **The Hawksmoor Learning Trust** 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. **THLT** requires that proportional (suitable and sufficient) risk management systems are in place, requiring 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. **THLT** 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 pupils are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal or 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 The Hawksmoor Learning Trust, 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 the following web link:**  
**[www.plumsun.com](http://www.plumsun.com)**

**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 LOtC learning opportunities.**

Refer to LOtC 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, **The Hawksmoor Learning Trust** is committed to providing emergency planning procedures to support establishments in the event of a critical incident through a service level agreement with the Local authority if such an event occurs.

Refer to LOtC NG document: “**Critical Incident Management for Visits**”

**To activate support from: Northamptonshire County Council Emergency Planning Team**

**Normal office hours: 0300 126 1012**

**Outside normal office hours: 07885 292851**

These numbers should be carried by leaders at all times during an off-site activity but should only be used in the case of a genuine emergency. Under no circumstances should these numbers be given to pupils or to their parents or guardians.

## **7. Monitoring**

As an employer, **The Hawksmoor Learning Trust** ensures that there is sample monitoring of the visits and LOtC activities undertaken by its establishments, as part of its wider safeguarding Audit. Such monitoring should be in keeping with the recommendations of LOtC National Guidance. 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.

Refer to LOtC EG document: “**Monitoring**”

## 8. Assessment of Leader Competence

LOtC Employer Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of **The Hawksmoor Learning Trust's** Policy that all **school** leaders and their assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with the LOtC guidance.

Refer to LOtC NG document: ***“Assessment of Competence”***

## 9. Role-specific Requirements and Recommendations

LOtC National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found in the THLT school management structures. These are:

### Responsibilities

**The Local Academy Board (LAB)** as employer will satisfy themselves that appropriate safety measures are in place and that training needs have been addressed.

**The Head will:**

- ensure all visits and off-site activities have specific and appropriate educational objectives
- ensure off-site programmes are led by competent staff who are appropriately experienced to assess the risks, manage the activity and manage the specific group;
- check that the staffing is suitable for each visit;
- check that risks have been assessed, significant risks recorded and any appropriate safety measures are in place.

**The Educational Visits Co-ordinator**, has delegated responsibility from the Head of School and approval of the Governors to authorize all off-site School visits and to ensure that all visits are prepared and conducted in accordance with the required standards. The Educational Visits Co-ordinator requires regular updated training and must stay abreast of updated guidance and best practice.

**The party leader will:**

- take overall responsibility for the supervision and conduct of the visit and continues to monitor the arrangements to ensure the on-going health and safety of the group.
- obtain the Head of School's approval (or the EVC on his /her behalf) before an offsite visit takes place;
- follow policy and procedures of the Council and the school;
- assess the risks involved and amend as appropriate any previously recorded risk benefit assessment;
- use the school planning checklist to ensure all procedures have been followed;
- inform parents fully about the visit and gain their consent, where appropriate;
- reassess risks while the visit or activity takes place;
- ensure there is a contingency plan (Plan B) should a significant change to the programme be necessary due to weather etc.

**Manager of an establishment other than a school** has responsibility to ensure all of their establishment procedures and practices are adhered to by their staff and that all of their safety measures and practices are up to date.

**Members of staff, volunteers and parent helpers should:**

- Assist the party leader to ensure the health, safety and welfare of pupils on the visit;
- Be clear about their roles and responsibilities whilst taking part in a visit or activity.
- Abide by the Code of Conduct for trips and Visits (appended)

**Responsibilities of parents**

Parents have an important role in deciding whether any visit or off-site activity is suitable for their child. Subject to their agreement to the activity parents should:

- support the application of any agreed code of conduct;
- inform the party leader about any medical, psychological or physical condition relevant to the visit;
- provide an emergency contact number;
- sign the consent form.

**Responsibilities of pupils**

**Whilst taking part in off-site activities pupils also have responsibilities about which they should be made aware by the party leader or other members of staff, for their own health and safety and that of the group. Pupils should:**

- Avoid unnecessary risks;
- Follow instructions of the party leader and other members of staff;
- Behave sensibly, keeping to any agreed code of conduct;
- Inform a member of staff of significant hazards.

## 10. Charges for Off-site Activities and Visits

The Hawksmoor Learning Trust, Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to LOtC NG document: ***Charges for Off-site Activities and Visits in an Educational Establishment***

## 11. Vetting and DBS Checks

**Employees working in schools within The Hawksmoor Learning Trust** who work *frequently* or *intensively* with, or have *regular access* to pupils or vulnerable adults, must undergo an enhanced DBS 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 4 days or more in a month or overnight.

However, it must be clearly understood that a DBS 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 pupils 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.

Refer to LOtC EG document: ***“Vetting and CRB Checks”***

## **12. Requirement to Ensure Effective Supervision**

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

Effective supervision should be determined by proper consideration of:

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

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

Refer to LOtC NG document: ***“Ratios and Effective Supervision”***

Refer to LOtC document: ***“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 pupils. 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:

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

The Hawksmoor Learning Trust **takes the view that where a provider holds such one of the above accreditations, there should be no need for its schools to seek further assurances.**

Refer to: LOtC EG document ***“Preliminary Visits and provider Assurances***

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

Employer’s Liability Insurance is a statutory requirement and The Hawksmoor Learning Trust holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it. This cover should extend to those persons who are acting in a voluntary capacity as

assistant supervisors for schools in the Trust. The Trust 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. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff. The indemnity covers activities such as off-site activities and visits organised by all establishments and settings for which the employer is responsible.

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

THLT Visit and Activity leaders should contact the School Insurance Provider to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Refer to LOtC NG document: ***“Insurance”***

## **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 pupils 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 pupils. 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

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

Under the Equalities Act 2010, 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.

Refer to LOtC NG document: ***“Inclusion as a Legal Issue”***

## **16. Adventure Activities Licensing Regulations**

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

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

The intention of the regulations is to provide a regulatory framework to protect children, parents, teachers and schools when using providers of defined adventurous activities in closely defined

environments. The regulations and supporting inspection regime provide a formal process of professional inspection to accredit that providers have effective safety management systems and processes, meeting a national standard.

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

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

Refer to LOtC EG document: "**Summary of Adventurous Activity Licensing Regulations**"

## 17. Good Practice Requirements

To be deemed competent, a **school's** Visit / Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognized good practice for that role*.

All staff and helpers must be competent to carry out their defined roles and responsibilities.

LOtC Employer Guidance sets a clear standard to which **school** 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 of 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.

Refer to LOtC EG document: "**Good Practice Basics**"

## 18. 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. 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 pupils in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

Refer to LOtC EG document: ***“Transport: General Considerations”***

Refer to LOtC EG document: ***“Transport in Minibuses”***

Refer to LOtC EG document: ***“Transport in Private Cars”***

## 19. Planning

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 pupils 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.

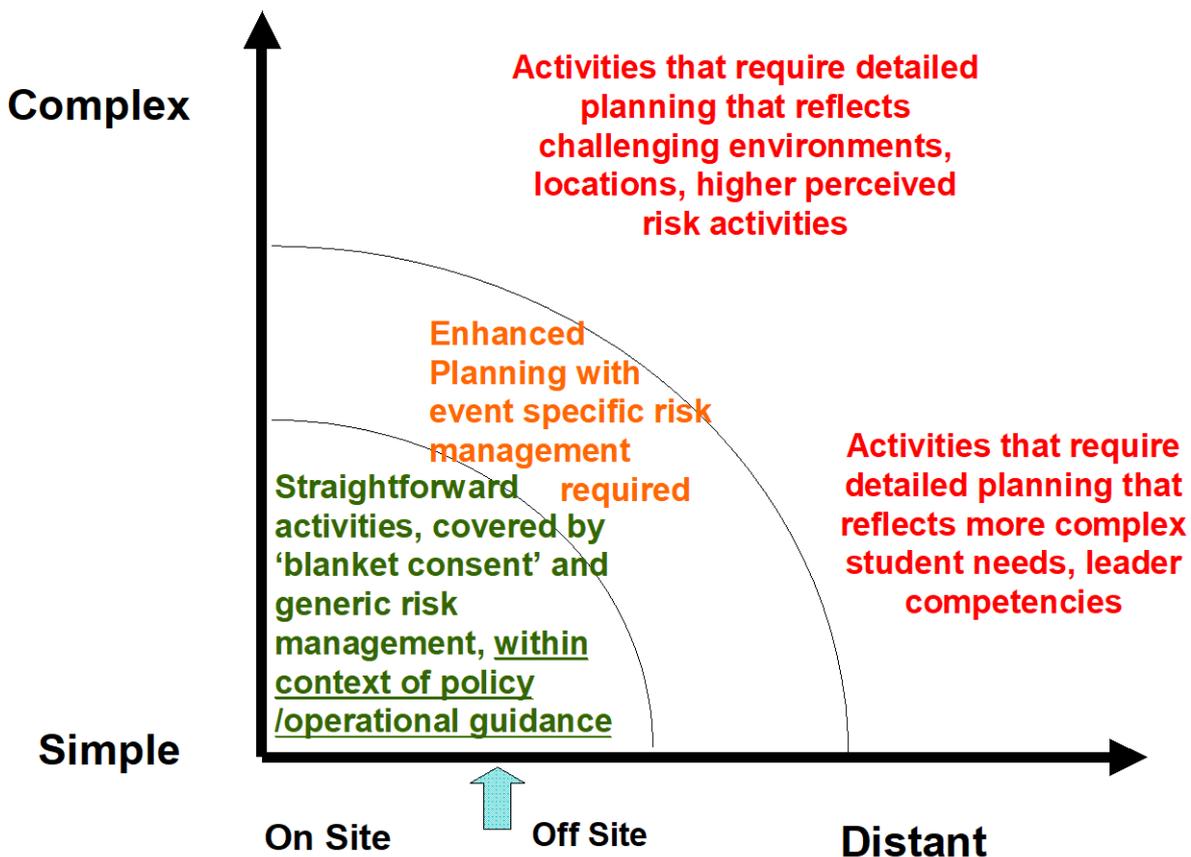
It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brain storming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigor (an Ofsted expectation), then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and also be a vital part of the risk management process in providing some objectivity in a “Risk Benefit Analysis”. Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

To reduce bureaucracy and encourage activity, establishments need to take account of the legalities regarding a requirement for formal consent. When an activity is part of a planned curriculum in normal curriculum time and no parental contributions are requested, then a formal consent is not necessary. However, in the interests of good relations between the establishment and the home, it is good practice to ensure that those in a position of parental responsibility are fully informed.

This supports the move towards developing activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to *“operational guidance”* that makes it clear how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity. These variables can be remembered as **“SAGED”** as explained below.

- Staffing requirements – trained? experienced? competent? ratios?
- Activity characteristics – specialist? insurance issues? licensable?
- Group characteristics – prior experience? ability? behaviour? special and medical needs?
- Environmental conditions – like last time? impact of weather? water levels?
- Distance from support mechanisms in place at the home base – transport? residential?



Refer to LOtC NG document: ***"Planning Basics"***

Refer to LOtC NG Power Point: ***"Planning Visits Off-site Activity and LOtC"***

## 20. The Value and Evaluation of LOtC

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 LOtC, including the fact that it raises achievement. THLT Headteachers, senior managers, EVCs and Visit Leaders are strongly recommended to familiarise themselves with the main content of this report.

