

Educational Visits Policy

September 2023

Office use

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|  |  | **Associated documents:** | | | |
| * DfE (Department for Education) Guidance on Educational Visits * North Somerset Council’s Visits Guidance for Children and Young People (‘NSC’s Visits Guidance’) * OEAP National Guidance | |  |  |  | |
|  |  | **Links to:** | | | |

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# Introduction

The Elmtree Learning Partnership and Governors of each Setting recognise that the participation of children and young people in a wide range of visits, journeys and experiences is important in promoting learning and development. As part of their responsibilities, the Settings, Governors, and Leadership Teams will take all reasonably practicable steps to ensure the health, safety and welfare of participants while travelling to, and engaged in, activities away from the setting, whether provided by a contracted provider or the setting itself.

The Setting’s Educational Visits Policy is to ensure that the safety of students, employees and others is managed, to minimise risk as far as practicable and in developing its procedures, is guided by National Guidance issued by the DfE and the Outdoor Education Advisers Panel.

# Scope and remit

This guidance is specific to all situations where staff (or volunteers) acting in the course of their employment take responsibility for children and young people taking part in activities off Setting premises. This includes outdoor learning, off site, residential and overseas visits.

NSC’s Visits Guidance and OEAP National Guidance is not pertinent to situations where schools operate on split sites, work experience placements or Physical Education events (excepting aspects of managing the journey either side of a sporting activity) where activity supervision should be that recommended by specialist PE Guidance such as that provided by the Association for Physical Education (AfPE).

# Buy-back support for educational visit support

To achieve its objectives and ensure safety across the setting, it is required that all Elmtree Learning Partnership adhere to the following:

All Settings arrange annually the service support of North Somerset Council, Educational Visits and Outdoor Education Advisory Service and use the Evolve risk management and visit planning system. All Elmtree Learning Partnership are responsible for the cost of this service.

# Responsibilities

The Health and Safety at Work Act 1974 places the overall responsibility for health and safety on educational visits with the employer (Elmtree Learning Partnership).

The employer’s responsibilities are to provide guidance, information, and a policy framework for staff to work within (these are itemised within the NSC’s Visits Guidance).

## Responsibility of Setting Committee and Executive Setting Lead/Setting Lead

Governors need to be satisfied with the setting’s procedures and practice in relation to this guidance. They should ensure that the guidance is in place in Settings and is actively followed. They should ensure that the Setting Lead and staff have the time and expertise to fulfil their responsibilities regarding visits. It is not necessary for governing bodies to approve each visit. However, Setting Leads should inform local setting committees, in advance where possible, of all non-routine visits, particularly those involving adventure activities, residential visits and visits abroad.

The overall responsibility for all visits rests with the Executive Setting Lead and Setting Lead at each Setting. The respective roles of each are outlined within the NSC’s Visits Guidance.

Please see the flow chart for approval of all categories of visits in Appendix 4.

There MUST be a named member of the Senior Leadership Team, who has delegated responsibility for monitoring and overseeing Educational Visits (this may be the Setting Lead or another designated person from the Senior Leadership Team). This member of staff will be responsible for ensuring that all visits and trips are planned, organised, controlled, monitored, and reviewed in accordance with North Somerset Council, DfE, Elmtree Learning Partnership guidance documents and other relevant regulations and should only authorise visits when everything is fully in place. The Executive Setting Lead can also authorise visits in his/her absence.

### N.B All Category C visits MUST obtain approval in principle from the Setting’s Chief Executive prior to any planning taking place.

Following this, the Compliance Quality and Risk team will review the visit to ensure that it has been planned in accordance with the procedures and processes set out in the Policy.

## Responsibility of the Educational Visits Co-Ordinator/Administrator (EVC) and Deputy EVC

There MUST be an assigned Educational Visits Co-Ordinator/Administrator (EVC) in each Setting with a further deputy EVC to support as required.

The EVC/Deputy EVC should fully understand and adhere to the NSC’s Visits Guidance, DfE and Elmtree Learning Partnership’ specific guidance and this Policy. Where appropriate, the Foreign Commonwealth Office (FCO) advice should be followed.

They will undertake duties as agreed between themselves and the educational visits Senior Leadership Team member. They must ensure that all visits are considered within the appropriate approval channel, in accordance with guidance provided and are suitably recorded and that there is sufficient liaison with the LA Outdoor Education Adviser where necessary to ensure that visits meet the LA’s requirements.

The EVC should ensure that the Deputy EVC is updated on a regular basis and support as required should any absence of the EVC occur.

Where the EVC has been made aware of a significant incident, near miss, unforeseen hazards, risks, or general observations from other staff accompanying the visit, the EVC must undertake a thorough review and record within the Evolve system and report back to Senior Leader in charge of visits.

## Responsibility of Visit Leaders

The Visit Leader is approved by the Setting Lead in conjunction with the EVC and will have overall responsibility for the planning and supervision of the visit. This person must have undertaken the training prescribed in Annex 3 of this Policy and be sufficiently experienced and competent to run a visit to which they have been an assigned leader.

The Visit Leader will adhere to the NSC Visits Guidance, FCO and DfE guidance, this Policy, and other Elmtree Learning Partnership service specific guidance.

The Visit Leader will liaise with the EVC throughout the planning and preparation of their visit to ensure that any activities or events that may place staff or other participants at significant risk are assessed and that safety measures are in place prior to the trip taking place. It is our expectation that all Visit Leaders keep a full file of documentation relating to a visit they are leading as well as providing information for the EVC.

The Visit Leader will ensure that all parents of children on their visit are provided with all the required information, which may include risk assessment information, and that any questions raised are answered prior to the trip taking place. The Visit Leader will obtain the requisite parental consents.

The Visit Leader named for each visit will have overall responsibility for that visit whilst it is underway.

The Visit Leader will be fully aware of the emergency procedures and contact numbers and assign a Deputy Visit Leader, as required, to be fully informed of all the visit information in the event of the designated Visit Leader being unable to lead the visit and is prepared to take full responsibility to lead the visit. It is therefore desirable that all Deputy Visit Leaders have undertaken appropriate training.

Where the Visit Leader has been made aware of a significant incident, near miss, unforeseen hazards, risks, or general observations from other staff accompanying the visit, the Visit Leader must report back fully to the EVC who will then undertake a thorough review and record within the Evolve system.

## Responsibility of other supervisory staff on visits

The Visit Leader will ensure that all staff assisting with supervision on any visit will be aware of the NSC Visits Guidance, DfE and Elmtree Learning Partnership Educational Visits Policy and the specific risk assessments for the event.

All staff will ensure that the requirements of any risk assessments, risk control procedures and safety systems are followed.

All staff will ensure that once the visit has commenced, where any significant incident, near miss, unforeseen hazards or risks or observations are identified, they are brought to the attention of the Visit Leader during the trip.

# Arrangements

Staff must use the most up to date guidance when planning and providing visits away from their normal place of work. The EVOLVE system has been developed to facilitate this and is regularly updated. Settings MUST use this system for ALL visits in every category.

The Elmtree Learning Partnership flow chart template (Appendix 4) must be used for ensuring the correct authorisation process is adhered to.

When staff are using their own vehicles the Volunteer Drivers Form (Appendix B) must be fully completed and relevant insurance policies checked for cover.

A Visit Leader Checklist Form (Appendix C) MUST be used and kept on record for all visits.

# Visit categories

There are three categories of visits within the NSC’s Visits Guidance, and these have been adopted as the same for Elmtree Learning Partnership. All three require different levels of approval which are shown in Appendix 2.

# Local setting appendix to policy

Each Setting is to complete Appendix 1 to this policy and review at least annually in line with any amendments to the Elmtree Learning Partnership policy review, or making any amendments as required within the year. This appendix is required to be completed and checked by the Senior Leader in charge of visits by the end of September on an annual basis. This must be uploaded to the local setting website policy page.

# Financial planning for a visit

All visits require a financial plan to be completed and handed to the EVC before any authorisation of a visit can be made.

All visit leaders should refer to the Elmtree Learning Partnership Financial Procedures Manual (Income Section regarding trips) and Visits Financial Planning Form (Appendix D) when preparing a visit.

It is the responsibility of the Visit Leader, EVC and Setting Lead to ensure that appropriate insurance cover is in place for the educational visit, in liaison with their local finance manager. Settings should refer to the risk protection arrangement (RPA) for the Centre's guidance and make suitable enquiries with the RPA insurers as to insurance provision.

# Emergency planning

The Setting Emergency Plan (Sample Emergency Plan- Appendix E) is to be completed with procedures for educational visits and all staff should have access to this information and handed a copy when taking a visit.

Emergency Cards (Appendix F) must be issued with the appropriate guidance and contact numbers to ALL STAFF taking part in a visit.

A copy of all contact details and information as outlined in the NSC’s Visits Guidance must be left at the setting prior to any visit departing and with the designated Senior Leader overseeing the trip.

A log of significant incidents and near misses must be kept by the Educational Visits Co-Ordinator for each Setting. This must be sent to the Elmtree Learning Partnership’ Compliance, Quality and Risk (‘CQR’) team immediately after the visit. The CQR team will then decide on the next course of action.

In the case of significant incidents on any visit the Significant Incident Form (Appendix G) must also be completed.

# Training requirements for staff involved in educational visits

Elmtree Learning Partnership have an expectation that staff adhere fully to the training requirements in Appendix 3 (all training will be funded by Elmtree Learning Partnership).

# Support and funding for pupil premium, FSM, and other disadvantaged students

Elmtree Learning Partnership continues to have a commitment to enabling equality of opportunity for all children and will consider the needs of disadvantaged children when offering, planning, and delivering all educational visits. For further information please refer to the Setting’s Charging and Remissions Policy.

All requests for assistance should be authorised using the Elmtree Learning Partnership Parental Remission Request form (Appendix H). In the case of any disadvantaged children, this can be requested by a member of staff leading the visit. In all cases the approval forms should be authorised by the Senior Leader for Educational Visits.

# Monitoring, support, and review

As part of the Elmtree Learning Partnership’ commitment to sharing best practice and quality assessment, the following activities will be undertaken:

* Educational Visit Co-Ordinator's will meet once per term (minimum) to share best practice and create a shared environment of support and collaboration across the setting. The Chair of this group will be the Elmtree Learning Partnership’ Strategic Development Lead with responsibility for educational visits.
* Targeted evaluations of educational visits’ practice will be conducted by the CQR team led by Strategic Development Leader (responsible for educational visits).



Appendix to Educational Visits Policy Setting responsibilities

2023-24

**Elmtree Learning Partnership Educational Visits Policy - Setting Responsibilities**

|  |  |  |  |
| --- | --- | --- | --- |
| **Setting name and address:** |  | | |
| Position | Name | Date of Last Training | Type of Training (if applicable as per  Appendix 3) |
| Executive Setting Lead |  |  |  |
| Setting Lead |  |  |  |
| Senior Leader in charge of visits (responsible for authorising, overseeing, and monitoring educational visits in the setting.  *(Must be a leadership team member and can be the*  *Setting Lead)* |  |  |  |
| Named Educational Visits Co- Ordinator |  |  |  |
| Named Deputy Educational Visits Co-Ordinator |  |  |  |

As staff responsible for educational visits in Elmtree Learning Partnership we confirm that we have read, understood, and will ensure that all statutory regulations and guidance for educational visits as outlined in the Elmtree Learning Partnership’ Educational Visits Policy (and appendices), DfE visits guidance and NSC’s Visits Guidance are used and applied.

Signed Chair of Governors

(on behalf of the Local Setting Committee) Date

Signed Executive Setting Lead Date

Signed Setting Lead Date

Signed Senior Leader i/c Visits Date

Signed EVC Date

Signed Deputy EVC Date

# Appendix 2 – authorisation of educational visits

## Category A – Locally approved visits

All such events will be approved by the Senior Leader for Educational Visits and managed by the setting by adherence to NSC visits guidance and DfE guidance alongside the setting’s specific operating procedures (as listed below):

* All parents MUST complete the annual parental consent form (Appendix I – Annual Parental Consent). Without this form, students will not be allowed to take part in any regular curriculum-led visit or sports fixture.
* All Category A visits MUST be submitted to EVC for checking, authorisation and recording on the EVOLVE system. Each Setting must go to their establishment dashboard, click on the local area visits tab, then click on EVC approval required and click continue. A full checklist of information (Appendix C) must be taken on the trip and a duplicate copy left with the setting

## Category B – North Somerset Council Outdoor Education approved

Settings must include their own tear off reply slip on letters for parental consent (there is no prescribed Setting template) to be given for such events that do not have any high-risk activities. This will complement the annual parental consent form and it must always be checked that this is in place and duly signed before a child is allowed to go on a trip.

A specific risk assessment needs to be prepared or a generic risk assessment is required to be amended for such visits.

## Category C – The Executive Setting Lead/Setting Lead, Local Setting Committee and the North Somerset Outdoor Education Adviser MUST authorise and give approval for all Category C visits, (after Setting CET approval in principle).

All parents MUST complete the Category C consent form (Appendix J – Category C Parental Consent Form). Without this form, students will not be allowed to take part in the visit.

First Aid provision and the administration of medication and drugs for all trips should be considered in accordance with the advice provided in the NSC Visits Guidance.

# Appendix 3 – Training requirements

## Management of Visit Emergencies (MoVE)

Settings should have in place a written, structured, and rehearsed policy for the Management of Visit Emergencies. It is desirable that all Senior Visit Leaders have attended this training and disseminated to relevant staff prior to anyone leading/being part of an educational visit and refreshed in line with the Local Authority recommendations.

## Training for Educational Visit Coordinators (EVC)

It is a Elmtree Learning Partnership requirement that the Strategic Development Leader (responsible

for educational visits), Setting Lead, Senior Lead for Educational Visits (if different to the Setting Lead), the EVC and Deputy EVC attend EVC training delivered by NSC’s Visit’s Advice and Awards Team as follows:

* Full EVC training – when appointed to role
* Refresher training – every 3 years once full EVC training has been completed.

## Visit Leader training

It is desirable that the following staff must have attended the accredited Visit Leader Training (theory and practical full day) delivered by NSC’s Visit’s Advice and Awards Team:

* All staff who lead Category C visits;
* All staff appointed deputy leader of Category C visits;
* Strategic Development Leader (responsible for educational visits)

AND must be sufficiently experienced and competent to run a visit to which they have been assigned Visit Leader.

It is a requirement that the following staff must undertake the certified course “Organising and arranging school trips” available through The National College:

* New staff (NQT/Teaching Assistants/Teacher new to Setting);
* Existing staff who lead Category A & B & C visits;
* Existing staff where additional CPD (Continuing Professional Development) is required and/or desired in this area

AND must be sufficiently experienced and competent to run a visit to which they have been assigned Visit Leader.

## Visit Leader refresher training

It is desirable that staff leading visits refresh the Visit Leader training as set out above every three years.

## All other staff attending/supporting visits

It is advisable that all staff attending/supporting visits have a regular update (at least annually) on policy, procedure and best practice led by the EVC or Senior Leader in charge of visits.

Other courses must be considered and undertaken in accordance with NSC Visit Guidance and generic risk assessments in EVOLVE, dependent on the nature of the visit

All these courses can be accessed through the North Somerset Council Outdoor Education Team or other recognised and approved training providers and certificates must be uploaded to EVOLVE.

**APPENDIX 4 - FLOWCHART FOR EDUCATIONAL VISITS**



EVC to obtain approval in principle to start planning for ALL category of visits (as

per the Setting’s requirements)

Visit proposal by Visit Leader to EVC



CAT A



CAT C



Submit financial planning document to finance ASAP

(ideally 4 weeks + prior to visit but at the discretion of the EVC)



Submit financial planning document to finance ASAP

4- 8 weeks + prior to day visit

12 - 26 weeks + prior to UK residential 40 weeks + prior to overseas visit

EVC to complete and submit Governor Approval for Planning of CAT C Visit form



Plan and book trip in accordance with Evolve guidance/timelines, government guidance, Setting Educational Visits Policy and ensure appropriate insurance in place

Receive financial approval



Complete application on EVOLVE using “local visits tab” uploading all relevant documents including risk assessments – EVC must authorise via EVOLVE



Plan and book trip in accordance with Evolve guidance/timelines, government guidance, Setting Educational Visits Policy and ensure appropriate insurance in place

Receive financial approval



1. Visit Leader to review plans (use Visit Leader checklist)
2. Visit Leader issues information letter to parents countersigned by LT with consent slip or medical consent form, as appropriate
3. Collect any money in accordance with Setting requirements
4. Submit list of participating pupils to EVC (taking into consideration any SEND and/or behaviour risks)
5. Notify kitchen of numbers of pupils involved/packed lunches ordered (if applicable)



Before Departure

1. Copy of student list + all consent information (including medical) /emergency contacts to main reception (and when appropriate a designated person, if out of school hours)
2. EVC arranges copies for out of hours contact After Visit:
   1. Complete a review of the visit and submit to EVC
   2. Complete finance balance sheet and return to finance office within two weeks

CAT C only (THIS IS NOT APPROVAL)

Prior to departure - EVC to submit Educational Visits Section 2 to CQR team to review that Cat C visit has been planned and approved in accordance with the Educational Visits Policy

Complete application on EVOLVE uploading all relevant documents including risk assessments – EVC & Setting Lead must authorise via EVOLVE



Plan and book trip in accordance with Evolve guidance/timelines, government guidance, Setting Educational Visits Policy and ensure appropriate insurance in place



Receive financial approval

Submit financial planning document to finance ASAP

4 weeks + prior to visit



CAT B

Complete application on EVOLVE uploading all relevant documents including risk assessments – EVC, Setting Lead and LA must authorise via EVOLVE