



THE GILLFORD CENTRE

HEALTH & SAFETY POLICY - PART 3

OFF SITE VISITS PROCEDURES

Approved by			
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Position:	Headteacher		
Signed:		Version Number:	10
Date:	Sept 24	Proposed Review Date:	Sept 25

REVIEW SHEET

Each entry in the table below summarises the changes to these Procedures made since the last review (if any).

Version Number	Version Description	Date of Revision
1	Original	April 2014
2	Removed 24hr emergency arrangements from Governor role. Changed some wording about contracts in Head's role. Clarified national expectation EVCs will arrange staff visits training. Clarified under 18s do not count in supervision ratios even if they have simple supervisory tasks in Volunteer role. New section on safeguarding with clarification on DBS, volunteers, driving and exchange visits. New section explaining Duty of Care clarified re: third parties. New section on overseas and specialist activities. Updated guidance on transport and licences. Appendices removed: Form A, E, example generic risk assessment for All Visits. New appendices: vetting, exchanges, code of conduct, Provider Risk Management Statement Form and Driver Declaration Form.	July 2015
3	Major revisions throughout to halve the content but improve clarity and better signpost to staff to extensive guidance that they should read parts of before ever contemplating running a trip and dip in and out of the rest as the need arises.	December 2018
4	Updated to better reflect good practice in the management of data protection, data sharing, consent, and dispute issues (section 3.3); and planning visits potentially affected by terrorism (section 10). (Blue highlighting)	September 2019
5	Minor updates. Minor wording alterations, updated links, more information on the law under consent, removal of all reference to any guideline ratios of adults to children in line with OEAP National Guidance, 2 starting sentences and a guidance note on outlining emergency procedures. (Green highlighting)	November 2019
6	Links updated	May 2021
7	Updated to include a new section 10.5 on Public Health Emergency Preparedness to describe general expectations when managing visits during a local, national, or international public health situation affecting travel and individuals' behaviour like a severe local pollution event or global pandemic.	September 2021
8	Minor updates throughout regarding some significant updates to OEAP guidance and what people holding different roles in visits management need to be aware of. Updates will affect visit leaders' practical planning more significantly than they affect setting Policy. Key areas of updates: Managing emergencies, and Visits evaluation & monitoring	September 2022
9	New section on contracts, waivers, disclaimers. New introduction to the STAGER one-sheet risk assessment approach. Updated to provide clearer descriptions of roles in relation to the new Hub and the role of Visits Administrator. Links are both updated and highlighted in the body of model procedural text to signify staff should click on them to refresh and update their knowledge. The same links are not updated or highlighted in boxed guidance text meant for authors that should be deleted before issue.	September 2023
10	New: Example Standard Operating Procedures (SOP) for Category 1 visits based on OEAP guide 8.1d, section on pupils aged 18+, section for DofE, reference to environmental sustainability, wording on blood transfusions and parental consent, advice on using KAHub suppliers to reduce the workload of doing due diligence. Updated: Governor's role, activities requiring employer approval, parental consent, the approval process, safeguarding and child protection,	September 2024

	<p>overseas & specialist activities, risk assessment if using a SOP, supervision, transport and school OBU policies, and medicines. Moved: Guidance on letters for trips abroad from section 2.8 Parents to section 6 Overseas..., and Guidance on young people in a sexual relationship from section 11 Inclusion to section 4 Vetting.</p>	
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1 Introduction

The Gillford Centre recognises the positive outcomes associated with Learning outside the Classroom (LOtC) and believes that every young person should experience this essential part of learning and personal development, whatever their age, ability, or circumstances.

LOtC to be governed by these procedures is defined as: “any occasion where young people engage in activities beyond the boundaries of this educational setting”.

Our rationale is that such learning often makes the most memorable learning experiences and helps young people make sense of the world by linking feelings and learning. These experiences stay with them into adulthood and affect behaviour, lifestyle, and work. They influence their values and the decisions they make and develop an individual’s ability to transfer skills from outside to the classroom and vice versa.

1.1 Aims

When we provide learning outside the classroom, our intended outcomes seek to ensure that our pupils:

1. Enjoy participating and reflecting in outdoor activities and adopt a positive attitude to challenge and adventure.
2. Are enhancing their overall well-being by gaining personal confidence and developing character and resilience through taking on challenges, experiencing valuable failures, and achieving success.
3. Are developing their self-awareness and social skills, and their appreciation of the contributions and achievements of themselves and of others.
4. Are becoming alive to the natural local and global environment and understand the importance of conservation and sustainable development.
5. Are acquiring and developing a range of skills in outdoor activities, fieldwork, exploration, journeys, and expeditions.
6. Are demonstrating increased initiative and innovation, enthusiasm, curiosity, self-reliance, responsibility, perseverance, tenacity, and commitment.
7. Are developing and extending their key skills of communication, problem-solving, creativity, critical thinking, leadership, and co-operation.
8. Are learning to appreciate the benefits of physical activity and the lifelong value of participation in healthy leisure activities and reflection.
9. Are displaying an increased motivation and appetite for self-directed learning that is contributing to raised levels of attainment in other aspects of their development, as well as becoming concerned, responsible, and fulfilled citizens.
10. Are broadening their horizons and becoming open to a wider range of employment opportunities and life chances.

Giving young people responsibility for achieving these outcomes helps them to learn from their successes and failures.

1.2 Scope

We have formally adopted the Outdoor Education Advisers’ Panel “*National Guidance*” (NG) available at oeapng.info. Links to specific guidance documents on the OEAP website will appear throughout these procedures. **These documents are essential to the proper understanding and implementation of our procedures and all employees and volunteers acting on our behalf are expected to refer to them and follow their requirements and recommendations when planning and leading LOtC off site.** For this reason, these procedures are best not printed in hard copy, but reviewed on an internet-enabled device with access to the OEAP website.

Any clarifications of employer expectations which are necessary are outlined in these procedures or can be sought from Ashley Preston, Educational Visits Coordinator.

There are **two** categories of off-site visit, each with different procedures outlined in section 3.

Category 1 visits are broadly defined as day or evening activities that are relatively simple in the complexity of staffing requirements, timings, activities, group characteristics, environment, and are within easy reach of support. Category 1 visits and their leaders are vetted internally, the visits must comply with our Standard Operating Procedures (see and require approval from the Headteacher as a minimum).

Category 2 visits are broadly defined as those which require enhanced planning with event specific risk management to reflect the increased complexity of staff activity-specific competence requirements, timings, activities, group characteristics, challenging environments, and being more remote from support, and are typically adventurous activities and overnight stays. We source competent health and safety assistance with this category of visits as necessary from Kym Allan Health and Safety Consultants Ltd. (KAHSC).

Physical Education, School Sports, and Physical Activities (PESSPA) such as curricular swimming, sporting tournaments etc. are governed by these procedures only in respect of the journey to and from an off-site facility unless it involves an overnight stay. Conduct of PE activities is otherwise governed by the PE Department's Code of Practice; activity risk assessments and any current guidance from a relevant sporting National Governing Body or the Association for Physical Education (AfPE).

Work experience activities as defined in the publication '*Work Experience: a guide for secondary schools*' (DfES 2002) are not governed by these procedures.

To ensure best value and quality assurance in all learning outside the classroom, identifying the benefits and learning outcomes is embedded in the visit planning process. Targeted learning outcomes are recorded and communicated appropriately to everyone involved including parents in pre-visit information and visits are reviewed and rigorously evaluated within a framework of safety and quality.

2 Roles and Responsibilities

2.1 The employer

Our Management Committee is the employer and our critical friend, and they are responsible for ensuring:

- they understand their role and responsibilities as set out in OEAP documents [3.2a Underpinning Legal Framework and Duty of Care](#) (legal responsibilities) [3.1a Requirements and Recommendations for Employers](#) (employer responsibilities); [3.4f Member of a Management Board or Governing Body](#) (governor responsibilities), [3.3c Checklist – Management Board/Governing Body](#) (action to take to be effective), and other relevant guidance these documents refer to;
- there is a systematic approach to:
 - identifying or appointing an appropriate technical advisor and appointing and training our EVC and visit leaders;
 - assessing and approving visit proposals: we have written procedures and use Evolve;
 - managing incidents, emergencies and critical incidents;
 - managing and maintaining equipment;
 - using third-party contractors; and
 - performance monitoring and evaluation of the effectiveness of the LOtC we provide, including a performance assessment/review at least annually using [5.1b Establishment Self Evaluation Form](#) in line with the guidance in [5.1c Self-evaluation and the Ofsted framework](#) (see section 15 Visits Evaluation and Monitoring below). This should include consideration of [4.4p Visits and the Environment](#) (guidance on sustainability and how outdoor learning and educational visits can benefit from the environment while minimising their impact on it).

Our Management Committee has delegated the task of approving all visits to the Head teacher, **except for** Category 2 visits overseas and Category 2 adventure activities led by our own employees or volunteers when either is being undertaken for the first time ever. These visits must be notified to a full Management Committee meeting with all the information members will need to decide whether they approve of

proposals. This is likely to include advice from KAHSC which cannot be sought less than one week before the Management Committee deadline.

2.2 The Head teacher or Manager

Our Head teacher, is responsible for ensuring that they understand and fulfil their role and responsibilities in law; as a governor (described in Section 2.1 above); and as set out in OEAP documents [3.4g Head Teacher/Manager](#) (Head teacher responsibilities), [3.3b Checklist - Head Teacher or Manager](#) (what Head teachers can do to be effective), and other relevant guidance documents they refer to.

In summary, the Head teacher will take steps to ensure that:

- the general visits principles and arrangements outlined in Checklist 3.3b apply to the LOtC we provide.
- our procedures clearly set out how visits should be planned and managed to address the responsibilities they hold outlined in document 3.4g, for example, expectations of leader competence, employer requirements when choosing contractors, visit evaluation requirements etc.
- all LOtC complies with these procedures and any relevant OEAP good practice guidance by logging into [Evolve](#) to give all visits the final review (in line with the Visit/Activity Specific section of Checklist 3.3b) and their online approval;
- where charges are made to parents, they comply with our Charging & Remissions Policy, and procedures are in place to account for the finances of visits (see section 13 Finance below). Our policy is available to staff and published to parents through the school website.

2.3 The Educational Visits Coordinator

Our EVC (Ashley Preston), was selected using the criteria outlined in OEAP document [3.4j Educational Visits Coordinator \(EVC\)](#). They are responsible for ensuring that they understand and fulfil their role and responsibilities as set out in OEAP document 3.4j (EVC key requirements and responsibilities) and [3.3a Checklist - EVC](#) (what EVCs can do to be effective), and other relevant guidance documents they refer to.

In summary, the EVC will take steps to ensure that:

- the general visits principles and arrangements outlined in Checklist 3.3a apply to the LOtC we provide.
- all LOtC complies with these procedures by logging into Evolve and reviewing the visits submitted by visit leaders (in line with the Visit/Activity Specific section of Checklist 3.3a), before applying for final approval online from the Category 1 Visits Approver, or requesting technical advice online for Category 2 visits from KAHSC.
- they champion LOtC and challenge colleagues to use visits effectively to provide a wide range of pupil outcomes, contributing to our overall effectiveness.
- they support/oversee visits planning by providing clarification to visit leaders and by monitoring things like how appropriately helpers are being used, the early resolution of specific issues like managing SEND, obtaining Enhanced DBS Disclosures, access issues etc.
- they mentor leaders and aspirant leaders, contribute to assessment of their competence, support their ongoing development, sample monitor their activities to identify any further training needs, and ensure succession planning begins as soon as notice is received that a key member of staff is leaving.
- they provide regular updates to the Management Committee about LOtC and contribute to the annual performance assessment/review of the effectiveness of our LOtC.

2.4 Visit leaders.

Our leaders are selected using the key requirements and responsibilities criteria outlined in OEAP document [3.4k Visit or Activity Leader](#). They are each responsible for ensuring that they understand and fulfil their role and responsibilities as set out in 3.4k (providing evidence as necessary) and [3.3e Checklist - Visit Planning](#) which outlines what they can do to be effective.

All leaders are expected to have an understanding of and use for reference as necessary OEAP guidance [8.2b Visit Planning Mind Map](#) and [8.2c Visit Planning Flowchart](#) and sections 4 & 6-8 of the [OEAP Library](#).

For more information about specific leader competence assurance procedures for higher risk undertakings like adventure activities, see section 7 Induction, Training, Apprenticeship and Succession Planning.

In summary, visit leaders must:

- Ensure their activities comply with these procedures i.e. By logging into <https://kymallanhub.co.uk> and inputting enough data and uploading enough supporting information which adequately outlines visit arrangements **before** carefully reviewing their visit (in line with the relevant parts of checklist 3.3e), **and then** applying for approval online from the evc **no less than**, usually 1 week for category 1 trips and 6 weeks for category 2 trips;
- Ensure, if necessary, that any final amendments like last minute medical updates or attendee lists, are given to the online visits administrator for approved entry or upload online before departure.
- Show in their planning appropriate due diligence (reasonable investigation – into the needs of the group, quality of third-party providers etc.) And a clear understanding that the overarching duty of care for pupils remains with us, even when responsibility is shared with an activity provider who is leading i.e., clear handovers, briefings to consider stopping an activity at the first appropriate moment if concerned etc.
- Get informed parental consent.
- Evaluate all aspects of a visit, both during and after the event, and contribute to the annual performance assessment/review of LOTC; and
- Record and report all accidents and near-miss incidents in accordance with accident/incident recording and reporting below and RIDDOR (the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations, 2013) i.e., to the appropriate employer.

2.5 Assistant visit leaders

While we have not made it a blanket requirement for all off-site activities, where possible, a visit will have an assistant leader who is sufficiently competent, resourced, and briefed to take over from the visit leader in an emergency.

Our assistant visit leaders are selected using the criteria outlined in OEAP document [3.4L Assistant Leader](#).

Assistant visit leaders must:

- Be competent and confident to take over a visit and suitably fulfil the ‘*typical expectations*’ outlined in OEAP document 3.4l (as applicable to their activities) and as agreed with the EVC (providing evidence if required).
- be meaningfully involved in planning and preparation for the visit, including contributing to the risk management plans.
- ensure they understand their role & responsibilities, relevant policies & procedures, needs of the group, nature & location of activities, and how to work alongside other staff and the visit or activity leader.
- contribute to ongoing monitoring during and evaluation after the event.

2.6 Helpers

A helper is an adult who has an agreed role during a visit, but who is not a visit leader, assistant leader, activity leader, or participant. For example, a helper might be an inexperienced member of staff; a parent or carer; an apprentice, student, or trainee, or someone supporting the visit leadership team with their expertise, but not taking a leadership role (e.g., a driver or a local historian). When our risk assessments talk about “supervisors”, they might be experienced members of staff leading subgroups, or they might be helpers who more often supervise groups alongside an experienced member of staff.

Any child (aged 15 and under) or young person (aged 16 or 17) in a helping role will **not** be regarded as a supervisor in the supervision ratio count.

All helpers will be subject to a recruitment and vetting process proportionate to what they are being asked to do. If it involves activity leadership this might include providing evidence of qualifications and

undertaking an Enhanced DBS Disclosure for Regulated Activity in line with our expectations of employees. For more information see section 4 Vetting and Safeguarding below.

The minimum requirement is that a helper is competent and confident in what they are being asked to do, and that they understand our policies and procedures insofar as they affect what we are asking them to do.

Leaders must ensure that helpers who do not have an Enhanced DBS will **never** be left in sole charge of pupils or asked to carry out sensitive supervision such as giving prompts or physical help to pupils to eat, toilet, dress, wash etc. Arrangements will also ensure that inexperienced helpers will be accompanied by experienced helpers or staff.

Helpers can be given access to a copy of OEAP document [3.4m Helper](#), and the leader must ensure they:

- are briefed appropriately about, the pupils (including age, health, capabilities, special needs, safeguarding & behavioural issues) and the nature and location of the activity.
- can report concerns during a visit to the visit leader or assistant leader as soon as possible.
- understand that any role assigning leadership with direct responsibility for their own child is avoided for good practice reasons unless otherwise agreed for sound risk management reasons e.g., the child's age, maturity, or SEND; and
- contribute to the evaluation of the event.

2.7 Pupils

Our Behaviour Policy and Code of Conduct apply to all off-site visits and will be suitably reinforced before every departure and during visits. Sometimes, event specific additions might be made to the Code, but expected conduct, rewards and sanctions will be made clear to everyone involved.

When planning visits leaders will:

- consider SEND, medical, behavioural, and other significant risk management issues at the earliest stage of planning and in consultation with the relevant specialists if necessary.
- ensure any pre-conditions placed on a pupil's participation, such as suitable health or behaviour, are in line with our policies and are properly communicated to and agreed with the pupil (where possible), parents and anyone else relevant to decision-making **before** any deposit that is not fully refundable is paid;
- involve young people in the risk management process in ways appropriate to their age, ability, and level of understanding e.g. Duke of Edinburgh's Award participants doing their own risk assessment for camping; and
- before going on the visit, provide pupils with all the information they would need to be able to complete OEAP document [3.3f Checklist - Young Person](#) (outlines the key information they should have) and any personalised version we have created of [8.1i Model Code of Conduct](#).

Any child (aged 15 and under) or young person (aged 16 or 17) in a helping role (see section 2.6 above) is to be regarded as a pupil in the supervision ratio count and **not** as a supervisor.

2.8 Parents or those with parental authority

In written communications and face-to-face meetings where appropriate, parents can expect us to:

- provide clear information about:
 - what a visit involves so their consent can be properly informed.
 - any pre-visit preparation they need to take an active role in e.g., ensuring their child meets any pre-conditions for attendance and understands behavioural expectations and sanctions.
 - data protection and privacy information when sharing personal data with third party providers.
 - arrangements for sending a pupil home early (when there has been serious failure to meet the required standards of behaviour) or collecting a pupil before the end of a visit (when they have become ill or injured) and how any costs will be met.
- Ask for:

- emergency contact numbers, where an appropriate adult can be contacted 24/7 during the period of the visit.
- detailed personal information about a pupil to help us manage their wellbeing e.g., physical and mental health, medicines (incl. dosage and who may administer it), allergies, dietary or religious requirements, recent injury or infectious illness, sleepwalking, bedwetting, water confidence and swimming ability, phobias etc.
- specific consent regarding any proposed filming or photography.
- specific consent for a pupil to receive emergency medical treatment, including an anaesthetic or blood transfusion.
- cooperation in only making indirect contact with their child if there is a home emergency (normally through a nominated Emergency Base Contact's telephone number provided to parents).

This information should include (where relevant):

- Purpose of the visit;
- Details of the destination(s);
- For longer journeys, how parents will know their child arrived safely;
- Practical details e.g., dates, times, clothing, equipment, spending money etc. required;
- Costs, including how much parents are being charged or asked to contribute, deposits required, and whether surplus funds after will be returned to parents or retained for another visit;
- Cancellation terms and conditions;
- Insurance details;
- Details of all the activities involved, incl. what is involved in participating them;
- Details of how parents can contact their child or leaders at any time in the event of a home emergency.
- Accommodation arrangements;
- The nature of supervision, and any responsibilities pupils have for their own health and safety;
- Arrangements for providing for SEND;
- Information about any risks involved in the planned activities;
- Details of any pre-visit preparation where parents need to take an active role;
- Behavioural expectations and sanctions;
- Expectations on the use of technology e.g., mobile phones & trackers, social media 'check-ins';
- Arrangements for sending children home early i.e., if ill or misbehaving, and how any costs will be met;

OEAP documents [3.4n Guidance for Parents](#) (explaining what 'informed consent' means and the minimum mutual expectations parents and organisations should have of each other when arranging off-site visits) and [3.3d Checklist - Parent or Guardian](#) (which outlines key information parents need before their children go on a visit) can be made available to parents and carers if the EVC or a visit leader thinks they would be helpful, but well written letters by us about each trip are just as important. For more information about communication with parents and consent see section 3 Procedures below.

When a looked after child is part of our community, we will have a written agreement between the carer(s) (foster carers), and the legal parent or guardian (a Local Authority acting as a Corporate Parent), about the extent to which a carer can make decisions about visits or give consent for activities. It will make special reference to any limitations e.g., whether they can travel abroad, participate in adventure activities, or need to avoid specific geographical locations.

Our aim is to treat looked after children as much like any other pupil as we can and our Designated Teacher for looked after children and previously looked-after will lead on this. We also aim to treat their carers as much like any other family in our community as we can and will provide suitable information and support to try to achieve this.

3 Visits Procedures

All visit leaders are expected to plan off-site activities in line with these procedures and the principles in OEAP document [9b: The STAGER Diagram](#) (describes the boundaries of activities that are best covered by policy and procedures, and those that require enhanced planning and event specific risk assessment and procedures) using the updated STAGER approach.

They must also, where applicable to their visit, have an understanding of and/or use for reference OEAP guidance documents: [3.2f: AALA Licensing](#) (a good practice outline); [3.2h Visits and the Package Travel Regulations](#) (guide to the law and good practice arrangements). [4.1a Avoiding Accidents and Emergencies](#) (outlines good leadership habits and lessons learned from accidents, with some useful pointers on preventing and managing them), and [4.2b: Residential](#) (a good practice guide).

3.1 Obtaining approval for Category 1 visits

This category of visits and their leaders are vetted internally by our EVC and require final approval from the Headteacher.

Types of activities we class as Category 1 include:

- regular or one-off activities like swimming in leisure pools open to the general public; visits to shops, churches, museums, parks, other schools, offices, theatres etc. regardless of the presence of water or whether they extend or begin beyond the normal school day.
- walking in parks, other public places, or non-remote country paths (<300m above sea level **and** <1km from a road) regardless of the presence of water.
- field studies in environments presenting no technical hazards e.g., pond dipping, river dipping, bug hunting, pedestrian, or traffic surveys.
- forest or conservation-based programmes regardless of the presence of water.
- day visits further afield to places like Newcastle, Manchester, and London.
- non-adventure sporting activities **not** involving an overnight stay e.g., netball, football, cricket, water polo matches, swimming galas.

Some of these visits are so frequent, local and/or low risk, and to places or with organisations we know very well, that we have developed Standard Operating Procedures (SOP) to describe the scope of these Category 1 activities and how visit leaders are expected to manage the most significant risks. When visit leaders follow the SOP, they should not need to create visit-specific risk assessments.

Visit Leaders must:

1. Get approval in principle at the very outset of planning by either entering enough detail online and submitting an outline proposal to the EVC and having it returned with a note advising of in-principle approval, or by discussing it directly and receiving verbal approval to begin planning.
No visit arrangements may be made unless the outline proposal adequately addresses timetabling, finance, staffing, cover, and provider quality assurance issues, or there is a clear plan to resolve them before any commitments are made.
2. Review the SOP to see if the activities and planning fall under those arrangements and if so, follow them.
If not, identify benefits and learning outcomes and seek any third-party provider assurances.
3. Begin the formal approval process by updating the outline proposal online that was returned to them by the EVC with the note of in-principle approval (or by creating a new draft visit online if in-principle approval was given verbally) and entering data and uploading supporting information like the letter/email home with the itinerary & kit list etc. as and when it becomes available or confirmed.
4. Review the SOP on managing risks and emergencies and, if necessary, re-read the more detailed generic risk assessments it links to when considering the activities, locations, and needs of the group in

line with the specific risks identified in the SOP. Experienced visit or activity leaders are **not** expected to carry out a specific written risk assessment for Category 1 visits arranged using the SOP unless there is something exceptional about the activity, location, or pupils. For more information about risk assessment requirements see section 8 Risk Benefit Analysis and Risk Management below. Inexperienced leaders will be mentored through this process which might include needing to evidence their visit specific risk management plans in a written risk assessment for the first few visits they lead.

5. Give parents enough information about the visit for consent to be properly informed using approved letter/email templates (and offer them the opportunity to give/withdraw their consent if the visit involves religious or sex education, or is outside normal school hours).
6. Carefully review their final visit proposal (in line with these procedures and relevant parts of OEAP document [3.3e Checklist - Visit Planning](#)) and submit it for EVC approval online **no later than** 1 week before the visit. If the visit is returned by the EVC for further action, visit leaders should edit and update the visit and re-submit it online as soon as possible.
7. Collate and distribute as necessary all visit emergency information e.g., medical conditions, special needs, behaviour, Emergency Action Cards, panic cards etc. **no later than** 1 day before the visit. This includes ensuring any last-minute updates are added online by the Visits Approver or online Visits Administrator.
8. Finalise ‘checking out’ and ‘checking in’ procedures for before, during and after a visit.
9. Evaluate the visit soon after return involving staff, volunteers, and pupils as well where possible (for information on how see section 15 Visits Evaluation and Monitoring below).

3.2 Obtaining approval for Category 2 visits

The Management Committee must decide whether certain visits or activities require formal employer approval in line with any insurance policy limits or conditions of cover. This list is not exhaustive and may be subject to anomalies or require interpretation. Exceptions can include:

- a) facilities or activities provided by an external provider that holds a valid Learning Outside the Classroom Quality Badge and has public liability insurance cover of at least £1,000,000 , and
- b) Activities marked * where participants’ feet remain less than two metres above floor/ ground level.

For advice contact the EVC or our Outdoor Education Advisor.

Category 2 visits are those upwards on the Y axis and/or to the right on the X axis on the OEAP Radar Graph indicating that enhanced planning with event specific risk management is required, or that activities require detailed planning to reflect challenging environments, locations, higher perceived risk activities etc. or to reflect more complex pupil needs, leader competency requirements etc.

Types of activities we class as Category 2 include **all visits involving an overnight stay** and:

Climbing, Trekking etc. incl. artificial structures	Water Activities	Other Activities
<ul style="list-style-type: none"> • Abseiling • Activities in rivers, gorges, ghylls, canyons etc. • Bouldering*/traversing* • Coastering/sea level traversing • Fell running • Ice climbing • Mountaineering • Rock climbing 	<ul style="list-style-type: none"> • Activities in rivers, gorges, ghylls, canyons etc. • Aqua/water parks • Pool jumping/tombstoning/plunge pooling • Snorkelling/free diving/scuba diving • Swimming/diving/bathing <i>except</i> in public lifeguarded pool • Use of all watercraft including boats, boards, rafts, 	<ul style="list-style-type: none"> • Any visit outside the UK • Any activity more than 3km or 30 minutes travel from a public access point e.g., car park, layby, built-up area • Airborne activities <i>except</i> commercial flights • All powered vehicles including motorbikes, quad bikes, karts, hoverboards etc. • Archery • Bridge jumping/bungee jumping

<ul style="list-style-type: none"> • Ropes/obstacle/assault courses* • Scrambling • Tree climbing* • Via ferrata • Walking on hills, mountains, fells, moors or near cliff tops • Walking in lowland country more than a 30 minute walk from a public access point e.g., car park, layby, built-up area. • Zip wires/Tyrolean traverses. 	<p>floats, inflatables, skis etc. except:</p> <ul style="list-style-type: none"> – commercial water transport. – activities not involving powered craft where the whole body of water: <ul style="list-style-type: none"> ▪ is less than 1m deep; ▪ <i>and</i> is less than 10m from land; ▪ <i>and</i> has no tides or currents. 	<ul style="list-style-type: none"> • Camping in remote terrain • Camping involving the use of stoves or fires • Grass skiing • Ice skating <i>except</i> supervised managed rinks • Mountain boarding • Orienteering <i>except</i> your own grounds/public parks • Paint-balling/war games • Pony trekking/horse riding • Sand/land yachting • Shooting/airsoft shooting • Skateboarding • Trampoline park • Trapeze/high wire/tightrope walking*/slacklining* • Use of fires/camping stoves • Use of hazardous tools e.g., saws/knives • Use of power tools/chainsaws etc. • Use of hazardous substances/fireworks/pyrotechnics/explosives • Weaselling • Zorbing.
<p style="text-align: center;">Cycling Activities</p> <ul style="list-style-type: none"> • BMX biking • Cycle racing/ • Cycle touring/bikepacking • Gravel biking • Mountain biking • Off road cycling (except on designated cycle paths intended for road bikes). 	<p style="text-align: center;">Snowsport activities incl. artificial slopes</p> <ul style="list-style-type: none"> • Skiing/ski touring/ski mountaineering/cross-country skiing • Snowboarding/split boarding • Tobogganing/sledging • Ringos/tubing <p style="text-align: center;">Underground Activities</p> <ul style="list-style-type: none"> • Cave diving • Caving/potholing <i>except</i> show caves with official guides • Mine exploration <i>except</i> tourist mines with official guides. 	

This list is available to download separately using the '[View Category 2 Summary](#)' button on the Name page of any online trip or press Documents and filter for "approval" to find [KAHSC Category 2 Trips: List of Activities which may Require Employer Approval](#).

Visit Leaders must:

1. get approval in principle at the very outset of planning by either entering enough detail online and submitting an outline proposal to the EVC and having it returned with a note advising of in-principle approval, or by discussing it directly and receiving verbal approval to begin planning.

No visit arrangements may be made unless the outline proposal adequately addresses timetabling, finance, staffing, cover and provider quality assurance issues, or there is a clear plan to resolve them before any commitments are made.

2. identify benefits and learning outcomes and seek any third-party provider assurances.
3. begin the formal approval process by updating the outline proposal that was returned to them by the EVC online with the note of in-principle approval (or by creating a new draft visit online if in-principle approval was given verbally) and uploading evidence that parental consent is fully informed and risks are being suitably managed e.g., letters home, itinerary, kit list, code of conduct etc. when available
4. review generic procedures for managing emergencies and the applicable generic risk assessments considering the activities, locations, and needs of the group, and make visit specific plans.

All category 2 visits require visit-specific written risk assessments (the relevant completed generic risk assessments or a completed STAGER or something else that identifies hazards, risks, and control measures) to be uploaded online under section 8. Documents, and some may require a specific written emergency plan for the group or an individual.

We expect the competent activity leader to be the named assessor on any risk assessment specifically relevant to an activity they are leading, even when they are not the overall visit leader. For example, if a member of staff were a BOF qualified orienteering coach, they will assess the risks of the orienteering element of the residential because they are specifically competent to in a way the visit leader is not.

If the journey aspect of a Category 2 trip is simple and directly comparable with journeys undertaken for Category 1 visits described in the SOP, the EVC can instruct the visit leader to follow the SOP and not do any written risk assessment of the journeys involved. This is unlikely to apply to an overnight or highly equipped visit where the quantity of luggage or equipment carried will raise journey risks unless specially considered and managed.

5. give parents enough information about the visit for consent to be properly informed using approved letter templates and offer them the opportunity to give/withdraw their consent.
6. carefully review their final visit proposal (in line with these procedures and relevant parts of OEAP document [3.3e Checklist - Visit Planning](#)) and submit it for EVC approval online **no later than 6 weeks**. If the visit is returned by the EVC for further action, visit leaders should edit and update the visit and re-submit it online as soon as possible.
7. collate and distribute as necessary all visit emergency information e.g., medical conditions, special needs, behaviour, Emergency Action Cards, panic cards etc. **no later than 1 week**. This includes ensuring any last-minute updates are added online by the Visits Approver or an online Visits Administrator.
8. finalise 'checking out' and 'checking in' procedures for before, during and after a visit.
9. evaluate the visit soon after return involving staff, volunteers, and pupils as well where possible (for information on how see section 15 Visits Evaluation and Monitoring below).

3.3 Obtaining approval for Duke of Edinburgh's Award events

Activities off-site that contribute to students achieving their Duke of Edinburgh's Award (DofE) are governed by these procedures and will be treated as Category 1 or 2 educational visits.

The DofE Coordinator is Ashley Preston.

Information that the DofE Coordinator must ensure parents and carers receive introducing them to how this school runs the DofE programme and which help us get informed parental consent is found on the website.

The minimum expectation of DofE leader competence through qualifications or experience is an outdoor leaders award.

3.4 Communication and consent

We need parental consent to take sixth form or nursery and reception age children off-site before each visit or programme of visits. This is because the education legislation that says we don't need consent only governs the education of children who are of compulsory school age e.g., aged 5-15 years (s29 of the Education Act 2002). We send information home via School Spider describing the visit/visits programme and ask parents to apply their consent and make payment online where applicable. When families have online access issues or are unable to use online payment methods due to a protected characteristic such as a disability or religious or sincerely held belief, parents can come to the school office for support.

We don't need parental consent to take pupils of statutory school age off-site on visits which we use to deliver any element of the national curriculum when it happens entirely within normal school hours. We should still tell parents what we are planning to do because they may have a parental right to withdraw their child from school for that particular activity.

We need parental consent to take pupils off-site on visits which extend beyond normal school hours, are adventurous, or are overnight.

We operate a blanket consent procedure to cover **all visits**, including day trips that extend beyond the normal school day, overnight visits, and adventure trips, but we will always ask parents to re-confirm their

consent when any one of those 3 circumstances apply. A new blanket consent form is issued to all pupils when they arrive in our school and again at every change in key stage to reduce the chances of us having inaccurate data. Paper or online reply slips re-affirming parental consent are an integral part of providing information to parents about Category 2 trips.

When we seek specific consent confirmation for adventure activities and overnight stays we follow the procedure above but include the more detailed consent form which asks for current personal information like sleepwalking issues, swim ability etc. for return with payment where applicable.

The blanket and residential or adventure activities consent forms include the administration of anaesthetics, a blood transfusion, and blood products in an emergency, if a medical professional decides they are necessary. If, for any reason, someone with parental rights & responsibilities for a child does not consent to this, they must still sign the trip consent form (they could cross out or delete words they don't agree with) **and** write to us separately, clearly outlining what they do not consent to and why. Visit leaders must print this and save a copy to the encrypted trip mobile if one is taken. If the visit is abroad, we will ask parents to provide any translations we might need.

The role of staff in an emergency is to provide the written parental consent and any additional evidence to the proper medical authorities and to facilitate communication with parents if necessary.

We don't need parental consent to use personal data, including image or voice recordings when we use it for education purposes. Using the names, images, and voices of children in their work and in displays inside school is a fundamental part of their education, personal development and how we celebrate them. Video and photographs taken on school trips are a rich source and this does not affect anyone's statutory rights (as described in our Privacy Notice). Anyone can raise any concern with any member of staff about our use of their or their child's data at any time and we must ensure the rights of the individual are upheld if we've got no good reason to refuse.

We don't rely on consent to use video or photos taken on educational visits for the prospectus or on the school website etc. However, before publishing, visit leaders **must** ensure the planned use is described to parents and children and they are given the chance to opt out. For more information, please see our data protection policy.

We don't need parental consent to share children's personal data with a supplier or provider when the data is necessary to operate a contract with them. For example, a child allergic to certain foods can't be kept safe from them if we don't tell the residential centre's kitchen etc.

Our school Privacy Notice includes a general recognition that there are times when we do this kind of data sharing. When we know we will need to share personal data with a specific third-party provider like this, we will obtain a copy of, or a link to that provider's Privacy Notice, passing it on to parents and drawing their attention to what it says **before** they sign any consent for their child to take part. This helps us ensure that any trips consent we have is "fully informed". If we don't tell families about this data sharing, we risk failing to ensure their legal rights e.g., the right to object, the right to have information about them corrected etc. and we risk not having fully informed consent for the visit.

To ensure we provide consistently good information, there is a range of approved template letters home. Visit leaders must amend the most appropriate template to suit their individual visit, but may only use the relevant approved wording when they outline our arrangements for:

- charging, voluntary contributions & cancellation (where pupils change their mind about attending, or become unable to attend through injury/ill-health before departure, or are withdrawn by us for failing to meet any agreed pre-conditions, or any other relevant circumstances that we know are not insured;
- agreeing contracts or terms & conditions, acknowledgements of risk, disclaimers, or waivers (see section 13 Contracts and waivers).
- insurance (for more information on cover see section 12 Insurance below).
- place allocation procedures when visits are oversubscribed. Allocation of places by the "first come, first served" method including return of a deposit is not permitted because imposing financial conditions on securing a place discriminates against pupils of low-income families and does not comply with our wider equality duty).

When there is any kind of dispute about who is responsible for providing parental consent we will follow DfE Guidance Document: [Understanding and dealing with issues relating to parental responsibility \(Sep 2018\)](#) and we will comply fully with any court orders in effect. Where parents cannot agree, we might ask the parties in dispute to seek independent legal advice about obtaining a court order setting out exactly what decisions each parent can make in respect of the child (a Specific Issue or Prohibited Steps Order as appropriate).

4 Vetting and Safeguarding

All leaders are expected to have an understanding of and use for reference OEAP documents: [4.3e: Safeguarding](#) (guide to good practice safeguarding arrangements), and [3.2g: Vetting and Disclosure and Barring Service \(DBS\) Checks](#) (detailed guidance on deciding what vetting process needs to apply when people who do not already work in regulated activity accompany visits, most commonly volunteers, activity providers, and exchange hosts) when planning visits.

They should seek to identify and address vetting requirements at the earliest opportunity. Where there is any doubt whether an individual requires an Enhanced Disclosure for Regulated Activity (commonly known as an Enhanced DBS with Barred List check), the EVC will make the final decision in consultation with the Designated Safeguarding Lead (DSL) as necessary.

To safeguard pupils' mental and physical health and wellbeing on school trips, leaders are expected to:

- know school policies on issues that can increase child protection risks e.g., mobile phone use, consuming alcohol (adults & pupils), access to bedrooms of the opposite sex, behaviour etc.
- have an understanding of special vulnerabilities in the group e.g., to bullying, when deciding how to manage risks
- explain and enforce rules and restrictions fairly and report incidents appropriately.

Any safeguarding concerns which arise during a visit must be reported to the DSL (or deputy DSL) at the earliest opportunity and we will ensure that the visit leader has appropriate 24/7 contact details for them. The visit leader must also have the appropriate local area police and home area social care referral information in case a pupil is in immediate danger away from their home authority.

Visit leaders must consider very carefully the safeguarding and data protection implications of providing pupils with panic cards designed to be shown to a stranger if they need help that include where they are staying or contact details for their accommodation. They should also consider how appropriate it is to involve an un-vetted third party like a hotelier in incidents such as lost pupils. The school telephone number or the visit leader's trip mobile number may be more appropriate.

Careful consideration also needs to be given to whether the visit leader's trip mobile number should be provided to parents in case of emergency. If the group is caught up in a major incident, worried parents using the number might inadvertently put pupils in danger or stop the visit leader being able to seek help for the group. The EVC will advise.

5 Overseas Visits and Specialist Activities

Some visits include activities with special and significant health and safety, or financial risks and they require careful consideration at the planning stage and throughout.

Leaders are expected to have an understanding of and use for reference the guidance in section 7 of the [OEAP Library](#) and document [3.2h: Visits and the Package Travel Regulations](#) where relevant to the visit they are planning. Often, the need will depend on how significant location specific hazards are i.e., a visit to a park to feed ducks is unlikely to need an in-depth understanding of OEAP document 7.2i: Group Safety at Water Margins, but a complex river study in a challenging environment will.

Such activities might include (links are to the relevant numbered OEAP guides):

7.1a Adventure activities	7.1s Hosting a Homestay
7.1b Duke of Edinburgh's Award Expeditions	7.1t Provider-led study and sports tours

7.1c Collaborative Provision	7.1u Woodland Activities
7.1d Trampoline Parks	7.1v Snowsport visits
7.1f Exchanges and homestays	7.1z Visitor attractions
7.1g Farm visits	7.1x Swimming pools
7.1h Field studies	7.1y Using Armed Services Providers
7.1i Visiting the Countryside	7.1z Visitor attractions
7.1k Unaccompanied Expeditions	8.1q Provider Statement
7.1L Camping	8.1r Swimming Pool Provider Statement
7.1m Places of Worship	3.2h Visits and the Package Travel Regulations
7.1n Museums, Galleries and Heritage Sites	3.3g Checklist - Overseas Visit
7.1o Natural Water Bathing	7.2i Group Safety at Water Margins
7.1q Overseas expeditions	7.2j Weather and Group Safety
7.1r Overseas Visits	7.3a Using OEAP Outdoor Learning Cards

When a visit is overseas, in addition to the information in Section 2.8, parents can also expect clear information about:

- Documentation required (passport, visa, consent to travel overseas, and in some cases evidence of the child’s right to reside in the UK)
- The need to obtain a valid EHIC/GHIC and what the travel insurance covers.
- The need to disclose full information about a pupil’s physical and emotional wellbeing or mental health that may affect them during the visit, of any medicines they need to travel with and what will happen if there is an emergency overseas e.g., a pupil becomes ill or injured.
- Any aspects of the visit where health and safety risks are greater than in the UK and relevant customs restrictions e.g., on carrying meat & dairy products out of or into the UK.
- Expectations about downtime, curfews, bedtimes, alcohol, smoking, vaping etc.
- Their responsibility to check roaming charges abroad with their mobile phone providers.
- Expectations arising from legal or cultural differences, such as traffic laws, dress, and behaviour.
- Foreign language learning expectations.

6 Induction, Training, Apprenticeship and Succession Planning

The minimum expectations we have of all leaders is that they are accountable, confident, and competent in line with OEAP guidance [3.2d Approval of Leaders](#), so we follow an appropriate recruitment process which includes vetting (see Section 4 on Vetting and Safeguarding above), assessment and induction.

Volunteers who take a lead or solo supervision role will undergo the same recruitment and induction process as staff, but in proportion to what they are being asked to do.

Specialist or adventure activity leaders who we are responsible for under our Employer’s Liability Insurance are required to provide evidence of their competence to lead such activities e.g., a suitable qualification or training certificate, a logbook or summary of their most recent relevant activities, and in some cases, the testimony of a third party qualified to assess the individual as an instructor in their field. Advice must be sought from our competent health & safety advisors and insurers where necessary.

Staff or volunteers new to us or the role we are asking them to fill, are expected to take part on visits before leading trips.

Our EVC will undertake the nationally recognised OEAP EVC course and attend regular refresher training. We are also committed to investing in the continuing professional development of our staff wherever we can.

7 Risk Benefit Analysis and Risk Management

Leaders are expected to have an understanding of and use for reference OEAP documents, [4.3c Risk Management - an Overview](#); [4.3f Risk Management - Some Practical Advice](#); [4.3g Risk Management - What to Record and How](#) on risk assessment and how to do it effectively and proportionately when planning visits. Visit leaders who use KAHSC generic risk assessments may find the KAHSC guide [Risk assessment: Evaluating risk \(risk rating\)](#) helpful.

New or inexperienced leaders will receive adequate induction, training and mentoring in visit procedures and especially our risk management expectations.

We expect them to involve all accompanying staff, and young people where appropriate, in the planning and preparation of visits, including risk management and recording of the risk-benefit assessments.

The only legal requirements of a risk assessment are that it must:

- Identify the *hazards* that might cause significant harm (weather conditions like the sun), the associated *risks* (sunburn, sunstroke etc.), and the *control measures* needed to manage the risk e.g., sunscreen;
- Be completed by a competent person (someone with knowledge, experience & support);
- Be suitable, and sufficient (dated with a dd/mm/yy of when the assessment was finalised).

We have no set requirements on format but recommend KAHSC generic risk assessment templates hosted at kymallanhub.co.uk or the [Play England Risk Benefit Assessment template](#).

When planning Category 1 visits, dynamic (mental) risk assessment as events unfold will be the primary key to keeping people safe. To ensure they are properly prepared, leaders must review the SOP/these procedures for managing emergencies and consider the activities, locations, and needs of the group. Experienced leaders who have already shown they can effectively assess and manage risk are **not** expected to write their visit-specific risk assessment down unless there is something exceptional about the activity, location, or pupils.

Experienced leaders should tick the generic risk assessment declaration online and select the generic templates that reflect school-adapted copies reviewed. Inexperienced leaders will be mentored through the risk assessment process which might include them needing to evidence their visit specific risk management plans in a written risk assessment to be uploaded online, regardless of what category their visit is. The EVC will direct them at the time they seek approval in-principle.

When planning Category 2 visits, the risk management planning must be written down so it can aid memories, be shared easily, and evidence preparations. Leaders must follow these procedures and write down their visit-specific risk management plans, using applicable generic risk assessment templates we recommend or something else suitable considering the activities, locations, and needs of the group.

All category 2 visits require visit specific written risk assessments to be uploaded online under section 8. Documents, and some may require a specific written emergency plan for the group or an individual.

In limited circumstances, the EVC may instruct a visit leader that specific written risk assessment of the journeys involved, such as on a day trip to an adventure centre, is **not** required because the journey is simple and directly comparable with journeys undertaken for Category 1 visits covered by our SOP/where our school-adapted risk assessments. This is unlikely to ever apply to an overnight or highly equipped visit where the quantity of luggage or equipment carried will raise journey risks unless specially considered and managed.

Using the STAGER one-sheet approach to recording risk assessment is not a substitute for using the contents of any existing generic risk assessments that we recommend, as a prompt or aide memoire to guide visit planning. It is just a substitute for recording the visit-specific measures decided on separately on each generic template used.

7.1 Our duty of care

We expect all staff and, to a limited extent volunteers, to understand the key elements around our duty of care to pupils outlined in OEAP document [3.2a Underpinning Legal Framework and Duty of Care](#) as follows.

The staff, volunteers and third parties we engage to work for or with us have a legal duty to take *reasonable* care to avoid acts or omissions which could *reasonably* be foreseen to cause injury to anyone for whom they should *reasonably* have regard.

The legal expectations for the different standards of care are:

- non-specialist/non-professional adult (that of an ordinary ‘reasonable person’ - traditionally referred to as “what the man on the Clapham omnibus would do” e.g., a parent helper with no relevant professional skills).
- adult with expertise/specialist knowledge (that of a ‘reasonable professional’ - a higher standard than that of the ‘reasonable person’ e.g., staff or a parent helper with a relevant professional skill e.g., teacher, youth worker, childminder, social worker, activity instructor).
- employers (‘in so far as is reasonably practicable’ - the balance of cost against the benefits of putting controls in place and deciding what people do in our name - the highest standard held by governors).

This is why a leader’s understanding of our duty, the due diligence (reasonable investigation) required in selecting third party providers, and what to include in their briefings to helpers and third parties are so important.

We understand that because we work with children, who the law sees as vulnerable due to their age and inexperience, our duty of care is non-delegable. This means that if a pupil suffers injury or loss due to the negligence of a third party that we engaged, we might be held at least partly responsible for what went wrong and if the third party’s insurance doesn’t cover the outcomes, our insurers could become liable.

We expect leaders to carry out adequate due diligence when engaging third party providers to deliver activities with clear handover procedures agreed.

All staff and to some extent volunteers must ensure third parties who are leading activities “take reasonable care” too. For this reason, pupils will not be handed over to the care of a third party without an accompanying member of school staff or helper unless there is a very good reason which has been adequately explained to those with parental authority and agreed to by responsible all parties.

7.2 Effective supervision

Leaders are expected to have an understanding of and use for reference OEAP documents, [4.2a Group Management and Supervision](#) (outlining good practice guidance on arrangements for direct, indirect and remote supervision), [4.3b Ratios and Effective Supervision](#) (which explains what to consider when deciding what an adequate supervision ratio of competent adults to pupils might be) when planning visits and [4.2d Indirect Supervision of Younger Children](#) (a case study example describing the transferable principles of indirect supervision of young children in an enclosed facility to create a more exciting learning opportunity).

There are three types of supervision that could be arranged during a trip off-site:

- **Direct Supervision**, where pupils stay within sight or hearing of a leader;
- **Indirect Supervision**, where pupils may operate away from the direct control of a leader but within clearly set boundaries, and where direct supervision can be quickly re-established if necessary;
- **Remote Supervision**, where pupils operate well away from leaders, and where direct supervision could take some time to re-establish.

Parental consent will only be properly informed if the scope of all indirect or remote supervision has been explained to them.

We acknowledge that there is no such thing as a definitive ratio for a specific age group undertaking a particular activity off site and we expect leaders to make decisions based on their risk assessment.

Our best practice expectation for supervision on all visits is that there will be two competent adults, one of whom will be an employee, to suit the gender of participating pupils i.e., a male and a female adult when boys and girls will be present. **This is not an absolute requirement.**

Where single sex supervision only is available for a mixed sex group, this may be acceptable, but must be specifically drawn to the attention of those with parental authority in case they have any objection.

There may also be circumstances when a leader is lone working with pupils e.g., usually during activities like an inter-school tournament where they are the only adult representative of school, but other adults are present,

When this is the case, pupils will have the knowledge and skills to cope if their leader becomes incapacitated or fails to rendezvous with them as agreed, and they will be adequately briefed on what to do and equipped to do it e.g. the means to communicate, availability of extra funding etc.

Very occasionally pupils will participate in off-site activities without any adult supervision arranged by us. We expect this to be very carefully planned in light of possible emergencies and how pupils will manage them, using only experienced and trusted organisations who demonstrate to us that they have reasonable measures in place to safeguard our pupils when we are not with them.

Generic risk assessment templates that we might recommend our leaders use to help them plan the risk management of their visits may have guideline supervision ratios on them, but they are only ever “**starting points for consideration**”. We do not endorse a generic numbers approach to the safe supervision of educational visits and guidelines will only apply where the activity is relatively straightforward, and the group has no special requirements.

Leaders should be able to use the STAGER framework to explain their supervision decisions and, particularly for Category 2 visits, consideration of the following should feature clearly in their written visit specific risk assessment.

Staffing:

- Who is needed and available?
- What breadth and depth of skills, knowledge (and qualifications, licences, insurance), awareness, judgement, training and experience do they have relevant to all likely situations?
- Any personnel issues e.g., single sex supervision of a mixed sex group, adults with serious medical conditions or their own child on the trip?
- Any specific role allocations or assigned duties e.g., first aid, managing medicines, lights out & sleeping night duty, driving, 1:1, indirect/remote supervision plans (locations, checks, monitoring frequencies etc.)?

Timings:

- When will the trip impact the stage of study most?
- Should it be day, evening, or residential, weekday or weekend, term-time or holiday time?
- Does timing affect the availability of staff or cause staffing issues back at school or for base support?
- Does it clash with events at home or away e.g., religious holidays that may affect participation or safety?
- What other impacts do timings have e.g., weather, clothing, daylight, equipment, travel conditions, peak times, convenience, cost, missing school transport home, availability of activities?
- What is Plan B for lateness or missed transport connections that significantly impact plans?
- How does splitting into sub-groups to do different activities affect the ability of staff to support each other?

Activities to be undertaken:

- What *will* the group? What *might* the group do?
- Do activities meet the needs of the group and objectives of the trip?
- Do staff need specific training, qualifications, equipment, or insurance to deliver activities?

- Do participants need a particular level of competence, prior training, or specific equipment to participate in activities?
- Have all activities including travelling, 'free time', and being in the accommodation been planned and managed with the same care?

Group characteristics:

- Have the age, abilities, maturity, behaviour, and prior experience or training of the participants been matched to the activities and environments?
- Have individual needs been addressed e.g., to suit their sex, SEND, dietary, religious, social, emotional, or health needs, or to manage issues like phobias, sleepwalking etc.?

Environment:

- How do environments and conditions affect plans e.g., indoor or outdoor (clothing, shelter etc. needs, current and forecast weather, and underfoot or water conditions), public or private, urban or rural, hazardous or benign, quiet or crowded?
- What location-specific hazards require special plans e.g., kit for, briefing about, alternative routes to avoid or Plan B?
- Has adequate consideration been given to journeys too?

Remoteness:

- How far away is help e.g., time, distance, terrain, vehicular access?
- How difficult is it to summon help e.g., lack of device or signal?
- What are overseas travel requirements e.g., visas?
- How can an event affecting travel or communication (flooding, snowfall, terrorism etc.), suddenly make a group more remote, physically and psychologically.

Any guideline ratios must be used with professional prudence.

7.3 Transport

Anyone making transport arrangements for our visits is expected to have an understanding of and use for reference OEAP documents [4.5a Transport General Considerations](#) (good practice guidance on making any kind of transport arrangements), and [4.5d Seat Belts and Child Restraints](#) (a guide to the law on providing the appropriate child restraints). If it is a provider we have never used before, the leader must ensure the appropriate checks are completed and results given to the EVC so that they can approve them **before making any booking or agreement**.

Drivers cannot supervise pupils and drive. If the age, maturity, behaviour, special or medical needs mean they need active supervision during a journey, another responsible adult must accompany the driver.

7.3.1 Hired road transport with a driver

We have a list of appropriately licensed operators of coaches, small buses, minibuses and taxis who have demonstrated to us that they meet our requirements in line with relevant parts of OEAP guide [4.5e Hiring a Coach](#) (guidance on how to select a licensed UK operator to provide transport by road, the questions to ask and the evidence to see). All such transport will be arranged with them.

Before we use a new operator for the first time the headteacher will use [4.5f Checklist - Assessing a Coach Hire Provider](#) or [KAHSC Coach Hire Checklist](#), or [8.1s Coach or Minibus Provider Statement](#) to get enough assurances to add the operator to our Approved List.

7.3.2 Driving minibuses

Anyone making arrangements for us to drive pupils in minibuses, whether we own, hire or borrow them, is also expected to have an understanding of and use for reference [Driving school minibuses advice: schools and local authorities](#) (DfE advice on when employees with a car driving licence may drive a minibus and when a Section 19 Permit might be required), and OEAP document [4.5b Transport in Minibuses](#) (guidance on who can/can't drive a minibus on school business and good practice when managing and driving them, including outside the UK), and [KAHSC Safety Series G11: Driving and Managing Minibuses](#) (good practice

guidance on owning and using minibuses which includes important forms which assist us in approving drivers and carrying out checks) when they plan journeys.

We own our own minibuses and follow Safety Series G11 in managing and maintaining them.

When staff or other adults volunteer to drive a minibus on school business they will undergo our approval process using the [Minibus Approval to Drive e-Form](#). Drivers will be approved to drive on behalf of governors by the headteacher.

All drivers are expected to complete a minibus assessment before driving school minibuses.

Anyone who arranges minibus transport, where our staff or volunteers drive, must ensure they understand the licensing implications when drivers passed their car driving test **after 1 January 1997**. Only drivers licensed **before** that date will have Category D1 (not for hire or reward), licensing them to drive a minibus of any weight and tow a trailer on UK roads. Drivers licensed **after** that date will not have Category D1, so they are not licensed to drive a minibus at all on UK roads.

To be able to legally drive a minibus on UK roads, drivers without D1 on their licence, must display a valid Section 19 Permit in the windscreen of the vehicle they are driving. They are restricted to driving minibuses weighing a maximum of 3.5 tonnes (or 4.25 tonnes if they are adapted for disabled access) and may never tow a trailer.

No charges will be made, or voluntary contributions requested for any journey involving self-driven minibuses or for anything in connection with the minibus journeys i.e., the activity at the end of it, unless a valid Section 19 Permit is displayed in the windscreen of the vehicle used.

We need one Section 19 Permit for every minibus we drive at the same time. We own 5 permit(s), and they are kept on the bus windscreen. They are valid for 5 years and it is the responsibility of Elizabeth Dixon, school business manager to renew them when they become due. This involves completing the [PSV372](#) form and following the instructions on applying in Cumbria and paying any administration fee.

A Section 19 Permit is not valid outside the UK which means that only drivers with a full Category D1 on their licence (without the 101 which signifies 'not for hire or reward') can drive a minibus on school business abroad. All other drivers are restricted to driving Category B vehicles such as people carriers or multi-purpose vehicles (MPVs) abroad.

7.3.3 Transport in private vehicles

Anyone making arrangements for us to transport pupils on visits in privately owned vehicles is also expected to have an understanding of and use for reference OEAP document [4.5c Transport in Private Cars](#) (good practice guide to the arrangements and checks required) when planning journeys.

All drivers, whether staff or volunteers, are required to undergo the same process to be approved to drive pupils in their own vehicles. Each driver must complete a [Driving Declaration Form](#) and consent to online checks being carried out on their driving licence for motoring convictions, and their vehicle tax & MOT status where relevant. Drivers are reminded annually of their responsibility to advise us of any motoring convictions, medical conditions, or medicines they are taking (as they arise) if they might affect their approval to drive.

This school has an occasional business use (OBU) motor insurance policy which covers our authorised staff and volunteer drivers who voluntarily drive pupils on school trips and are paid expenses only. A copy of everything drivers need about our insurance before driving is provided when they are given the Driver Declaration to complete. It is the responsibility of Elizabeth Dixon to check our OBU policy exclusions annually on renewal to ensure our Driver Declaration includes everything relevant.

We understand that when we organise transport using parent or other volunteer helpers then the activity could be classed as regulated in any one of two ways:

- a). If the helper is alone in the car with pupils, then there is arguably an element of supervision, and so this meets the activity definition.
- b). Driving a vehicle being used solely to transport young people under an agreement with the school also meets the activity definition.

The deciding factor is whether the same helper transports pupils 'frequently' or 'intensively'. If they do then this is regulated activity (see section 4 Vetting and Safeguarding above for requirements), if they don't then it is not. Those organising this kind of transport need to be aware of any vetting required at the earliest stage of planning.

When parents make private transport arrangements between themselves, those journeys will not be considered as being taken on our behalf and they will not fall under the scope of these procedures.

8 Assessing Facilities and Providers

Leaders planning to use an external facility or provider are expected to have an understanding of and use for reference OEAP documents [4.4g Selecting External Providers and Facilities](#) (outlines the difference between a facility and a provider and the research required to select appropriate ones); [4.4h Using External Providers](#) (guidance on roles and responsibilities when using providers); [4.4f Checklist - Assessing a Provider](#) (a checklist for use to assess a potential adventure provider); and [6a: FAQs: Asking for a provider's risk assessments](#) (which explains why risk assessments are rarely a helpful measure of provider quality assurance).

A single venue could be either a facility or a provider depending on what it is being used for. The local football stadium will be a facility when pupils are taken there to watch a match. The local football stadium will be a provider when pupils are taken there to have a professional coaching session with the hometown team. The difference is the control the third party has over what pupils do. At the match there is passive control by the stadium through barriers, signs, and stewards etc., but school staff have full active control over everything the group does. At the coaching session there is active control by the stadium who take complete charge of delivering a coaching session while school staff have passive control through the pastoral support they offer from the sidelines.

When selecting a third-party provider, leaders must look for suitable quality assurance markers like accreditations with relevant professional bodies. Adventure Activity providers must hold an AALA licence when they offer certain activities to children who are not accompanied by their own parents. For details and to check a provider's licence go to: hse.gov.uk/aala. Providers that hold a Quality Badge do not normally need to provide further assurances about the safety or quality of their provision. Only if the specific needs of the group or visit are particularly complex should there be further investigation of a suitably accredited provider. For details of the Quality Badge scheme and to check a provider's accreditation status go to: lotcqualitybadge.org.uk.

A key reason for leaders to use KAHub early in the visit planning process is to save themselves time and cut admin. tasks out when doing due diligence on suppliers. Many of the assurances they need or signposting to find them on external websites is available there. If leaders reference assurances they have seen in their risk assessment, copies don't need to be uploaded to their online visit record (see <https://kymallanhub.co.uk/page/supplier/> and filter for the name of the supplier by tour operator, activity provider, activity facility, or accommodation).

If a provider does not hold a suitable accreditation which covers all aspects of their provision, leaders must use other means of gaining assurances about their operation. Using the [KAHSC Provider Risk Management Statement Form](#) or the OEAP [8.1q: Provider Statement](#) is an effective way of doing so. Leaders should first look for a pre-prepared 'Provider Statement', sometimes called a 'Management Statement of Competence' or a 'Risk Management Summary'. If the provider has one and it addresses all the points in the form, they must not be asked to complete the form.

We do **not** expect leaders to ask a provider for copies of their risk assessments because they are unlikely to be qualified to understand, assess and, if necessary, challenge them. Instead, they are expected to look or ask for information that will help them run a safe and successful visit.

It is not necessary to look for such accreditation or assurances from facilities that are open to the general public and where no arrangements are being made for them to provide activities or supervision, but they must still be assessed as suitable for the needs of the visit.

While websites, review forums and smart communications make it easier than ever before to gather information about facilities and providers, reliability can be questionable and there is no substitute for a preliminary visit, so we are committed to enabling staff to make them where necessary and possible.

If the leader is unable to answer yes to all the questions in checklist 4.4f in the section “Do you need to carry out a pre-visit to the provider?” they must discuss with the EVC whether they should. This cost may need to be built into the overall visit budget. Where a preliminary visit is not reasonably practicable, the leader should give special consideration as to how they will gather enough information to make an adequate assessment of their risk management and other issues.

9 Emergency Procedures and Incident Reporting

Leaders are expected to put in place an adequate ‘Plan B’ for every visit in case something reasonably foreseeable goes wrong with the original plan e.g., the venue is unexpectedly shut, the weather turns, the car park becomes inaccessible, travel restrictions are introduced etc.

Leaders planning any visit which might be significantly affected by a terrorism-related incident are expected to read [4.4e Terrorism](#), (how to prepare and stay safe in places with a threat of terrorism) or [KAHSC Terrorism Considerations for Educational Visits](#) and plan accordingly.

Even if the risks of direct involvement in a terrorism-related incident are judged to be especially low, consideration must be given to how the knock-on effects of an incident nearby or en route might end up directly affecting the group such as cancelled public transport, closed roads or stations, shut venues, very lengthy transport delays and security checks etc.

9.1 First aid

Leaders are expected to understand and use for reference OEAP document [4.4b First aid](#) when they plan provision for trips. It outlines the law and provides good practice guidance on making risk-based decisions about the first aid arrangements that might be needed. Where relevant, they should also make use of the [Resources for schools & youth organisations | Counter Terrorism Policing](#).

Decisions about first aid must be based on the leader’s risk assessment and, for Category 1 visits, be recorded in the online Activity Details section or in their online note to the EVC when they submit it for approval, or for Category 2 visits, be recorded on at least one written risk assessment uploaded online. Because it might be important in a claim for personal injury or damage compensation that we provided “suitable first aid”, the name and qualification of our first aiders accompanying a trip must be included.

Basic first aid support must always be available from either our own qualified adults or from the facility or provider. In some of the lowest risk circumstances the need might be satisfied by proximity to a local hospital or an urgent care/walk-in/minor injuries unit and the EVC will advise.

When visits include outdoor adventure activities led by our own employees or volunteers, the adventure activity leader will have a current and suitable first aid qualification, usually the 16 hours outdoor first aid course. When adventure activities are led by a provider, we expect leaders to see or receive assurances that there is adequate first aid available from the provider.

When visits include Duke of Edinburgh’s Award participants, our DofE Coordinator/Supervisor is responsible for ensuring that participants have the required first aid competence as detailed in the current DofE Expedition Guide.

It is a legal requirement that all public service vehicles, including our school minibuses, carry a first aid kit. It is the responsibility of the EVC to carry out the periodic vehicle maintenance checks which includes all on-board equipment. It is the visit leader’s responsibility to check that the on-board first aid kit is present and correct before departure. If a vehicle’s kit is used on a trip, it is the visit leader’s responsibility to arrange for the kit to be re-stocked/re-stock the used kit as soon as possible on return.

9.2 Supporting pupils with medical conditions

Leaders are expected to have an understanding of and use for reference our policy on Supporting Pupils with Medical Conditions, procedures for managing Anaphylaxis, Asthma, Diabetes & Epilepsy, and OEAP

documents: [4.4d Medication](#) (good practice guide to managing medicines and medical needs off-site); [60 FAQs: Allergies and Anaphylaxis](#) (the emergency action summary from the full [Department of Health: Guidance on the use of adrenaline auto-injectors in schools](#)); and; [Department of Health: Guidance on the use of emergency salbutamol inhalers in schools](#) (particularly the emergency action summary) where relevant, in taking account of medical needs in their visits planning.

Leaders must make themselves aware of how a pupil's medical condition or medical needs might impact on their participation in off-site activities (primarily through development of their Individual Healthcare Plan (IHCP)). Leaders are responsible for ensuring their visit meets our equality and inclusion duties and that any reasonable adjustments necessary have been or will be made.

Leaders must also make themselves aware of the medical conditions or medical needs of all accompanying adults if they might have a significant effect on visit or contingency planning. Adults must be able to provide information on a need-to-know basis only with a reasonable expectation of confidentiality.

A pupil will only be excluded from an activity if the Head teacher considers, based on the available evidence, that no reasonable adjustment can make it safe for them, or when evidence from a clinician, like a GP or consultant states that an activity is not possible for a pupil.

The leader's risk assessment will need to specially consider planning arrangements and controls to support pupils with medical needs. Most of that work will have already been done in the IHCP which is a risk assessment, and it may need updating in light of planned activities and be taken on the visit and/or uploaded to the online record.

Leaders must also take with them any forms or templates they need to manage or record the use of medicines i.e., the range of appendices available in our 'Supporting Pupils... Policy' such as general or individual administration records, the asthma/AAI registers etc.

Pupils who need emergency medicines like a salbutamol inhaler, or an Adrenalin Auto-Injector (AAI) will always carry one discreetly on their person (if competent to), and staff or another suitably briefed and trained adult will carry a spare. Leaders must ensure that they know whether they have parental consent to administer our school-owned inhaler or AAI to a pupil instead of, or as well as, their own prescribed medicine.

AAIs and other urgent care medicines like antihistamines or paracetamol are never to be regarded as part of a first aid kit and should not normally be kept inside one, but for security and accessibility reasons they may need to be carried in travel kits while out on excursions and all accompanying adults must be suitably briefed about this on a need-to-know basis.

When arranging visits overseas, we expect leaders to consult [nhs.uk/common-health-questions/medicines/can-i-take-my-medicine-abroad](https://www.nhs.uk/common-health-questions/medicines/can-i-take-my-medicine-abroad) **at least three months before the planned departure.** By then, leaders must know whether anyone in the group needs to carry a syringe device; a UK controlled drug e.g., methamphetamine derivatives like Ritalin; or a drug that is controlled/illegal in the destination country or countries travelled through. This is because special travel documents may be required and can take time to arrange. In some circumstances, doctors may need to be asked to prescribe an alternative drug for the visit. When pupils will travel with a controlled drug, leaders must follow up the NHS advice by referring to [gov.uk/travelling-controlled-drugs](https://www.gov.uk/travelling-controlled-drugs), to include consulting with the relevant embassies and making suitable arrangements when a drug is controlled over there.

If there will be a pupil on the visit whose, life, health or education will become at significant risk if their medicine is lost, ruined by poor storage, or destroyed, there needs to be a proportionate plan to replace it as urgently as necessary. Leaders must know how to do this if they are overseas.

Leaders needing specific guidance about individual pupils regarding first aid or medical arrangements should consult the SENDCo/ EVC / Head teacher before seeking visit approval.

9.3 Accident/incident recording and reporting

Leaders are expected to apply the general good practice leadership principles in OEAP document [4.1a Avoiding Accidents and Emergencies](#) (outlines good leadership habits and lessons learned from accidents, with some useful pointers on preventing and managing them).

If a pupil or adult that we have a responsibility for is injured on a visit, it must be recorded in the accident book of the responsible employer, where there is one. At a hotel or any other place where people work, it would be reportable to them as a member of the public injured in their workplace. Depending on the need for hospital treatment or the severity of the injury, they would be responsible for reporting the injury at their workplace to the HSE under RIDDOR. It must also be properly recorded back at school. If there is no other responsible employer because it did not happen at someone else's workplace, we must record it and we will be responsible for reporting a RIDDOR event to the HSE.

Leaders must follow our accident and incident recording procedures while away using an appropriate form to capture enough detail to make a proper report back at school. If the incident was serious this might include obtaining witness statements, taking photographs etc. to help us explain what has happened to parents and to provide useful evidence in case of a claim for compensation.

Detailed guidance on accident recording, reporting and investigation is available in [KAHSC Safety Series G03: Accident Reporting & Investigation](#) and our own Accident and Incident Recording and Reporting Procedures.

9.4 Critical incident procedures

As the employer, the Management Committee have the ultimate responsibility when things go wrong. Every individual that holds a designated role in the management of visits or visit leadership is expected to read OEAP good practice guidance in Section 4.1 of their National Guidance and the relevant parts of our Critical Incident Plan and seek any clarification they need about managing emergencies before visit plans are finalised.

During a pandemic or similarly wide-ranging local, national, or international emergency situation, we will use our judgement and government guidance in effect at the time to work out how to deliver learning outside the classroom effectively and safely.

Leaders will where relevant, be expected to consider:

- What the risks of emergency are and whether they have identified any individuals at particular risk and planned for them appropriately
- How they can reduce or eliminate risks effectively
- The potential impact of following local or national restrictions or sudden changes to them.
- Whether adequate insurance is still in place, whether new exclusions or terms apply, and how to ensure parental consent remains properly informed in emergent situations.
- How to obtain adequate assurances about measures in place with providers and facilities to protect public health and find out what is expected from groups.
- Whether an affected visit would also impact significantly on the safe running of the school afterwards e.g., if key staff must then self-isolate during a pandemic.
- How to ensure record keeping supports public health action like contact tracing

At times this might mean a leader will need to do additional written risk assessment and those who are unsure should seek advice from the EVC.

10 Inclusion

Leaders are expected to plan activities in line with our Equality, Inclusion, and Behaviour policies and the inclusion principles outlined in OEAP documents [3.2e Inclusion](#) and [4.4i Special Educational Needs and Disabilities](#). They need to take all reasonable steps to include all pupils with no pupil being directly or indirectly discriminated against.

Where necessary, advice must be sought from the SENDCo, EVC, Head teacher.

Any pre-conditions on suitable health or behaviour that could affect a pupil's participation in a visit (because they lack fitness or become excluded) must be adequately explained at the very outset to pupils, parents, and anyone else involved in decision-making or providing relevant support for the pupil, especially

if parents will suffer financial loss if their child is withdrawn from a trip. There must adequate record keeping to facilitate an open and fair decision with a clear review process in agreed stages. The final decision on whether a pupil participates in a visit rests with the Head teacher.

In considering how some pupils may need to be accommodated, leaders should also refer to OEAP documents [4.4L Transgender Young People and Visits](#) (a guide to sensitive planning); [4.4m Young People in a Sexual Relationship](#) (outlines the considerations and good practice) and follow relevant recommendations, and [4.4n Mental Health](#) (outlines the benefits to mental health of outdoor learning, and advice on how to manage participants' mental health).

11 Insurance

Leaders are expected to understand and use for reference OEAP document [4.4c Insurance](#) (a guide to insurance requirements and options) to ensure they understand what kinds of insurance cover could or needs to apply to their plans. They must also ensure they understand the extent and limitations of cover our existing insurance policies provide.

When the terms of any insurance policy will materially affect pupils and parents, we will draw their attention to them and advise about any significant gaps for example, when personal belongings or personal accident not covered (because there was no negligent party). The minimum information we will provide about our cover on request is the Schedule of Insurance (which values personal injuries and often sets other claim limits) and any exclusions and limitations. This is so that parents can make an informed choice about purchasing their own additional insurance cover.

When leaders choose a third-party provider to deliver activities where there is a real risk of a pupil sustaining a life-changing injury, such as during adventure activities or thrill-seeking sports, we require a minimum of £1,000,000 in Public Liability Insurance (PLI) cover. Leaders must see evidence of the cover that will apply during the visit, such as the certificate stating the amounts of cover and renewal date or a broker's Letter of Insurance Cover Confirmation. Providers that hold a LOtC Quality Badge publish their PLI limit and expiry date on the register at lotcqualitybadge.org.uk/search. If the policy expires before the date of the visit, the leader must look for or ask to see the current evidence when it becomes available.

If we fail to secure enough PLI from a provider to cover the costs associated with an injury that a pupil suffers due to the provider's negligence, our insurance may be held liable if it was reasonable that we should have sought better cover (case law *Woodland v Essex CC 2013*).

12 Contracts and waivers

Visit leaders are expected to understand and use for reference OEAP document [3.2i Contracts and Waivers](#) (a guide to what might be meant by contract, terms and conditions, risk acknowledgement, disclaimers, and waivers and how to decide what is and is not acceptable) when their arrangements require any such agreements.

This includes the understanding that a contract does not have to be in writing and can include verbal agreements, exchanges of emails, a ticket purchase, telephone booking etc. and that details in advertisements, brochures, and on websites etc. do not necessarily form part of a contract and that they must check what is actually included in any contract that they agree.

All contractual agreements for visits organised by us must be made between us and our suppliers and not directly between suppliers and parents or carers. However, all payment and cancellation terms that we are subject to and that we will pass on to families must be made clear to parents and carers in writing from the outset.

If a participant or parent contracts directly with a supplier, this might conflict with our supervision liabilities (when a parent or carer signs an agreement where safety is heavily contingent on behaviour, but they are not present on the trip to enact their promises) or may conflict with our insurance arrangements and not be covered by us.

Staff who enter into contracts must have the proper authority to do so and risk disciplinary action or personal liability for any costs involved if not.

13 Finance

Leaders are expected to understand their role in providing best value and avoiding any significant visit deficit or surplus as well as in implementing our Charging and Remissions Policy.

We have template letters with approved wording which outline what parents must be told in different circumstances about any charges being made, remission offered, funding that can be applied for, or voluntary contributions requested.

Any payment terms, financial conditions or financial commitments will be explained to parents before we seek their consent so that it is fully informed.

Leaders are expected to cost visits carefully to ensure there is no significant surplus or deficit, but to also plan any necessary contingency funding where it is simple, predictable and will arise under circumstances outside of our direct control. For example, an activity on the Wednesday of the residential will cost £X. If the weather is wet the alternative activity will cost £2X. The visit leader should budget for the wet weather activity.

Visit leaders will be given access to enough contingency funding through insurance arrangements, or school debit or credit arrangements in the case of minor disasters like missed transport connections or lost tickets.

Surplus visit funds will be disposed of as decided by the Head teacher in line with normal financial regulatory procedures i.e., returned to parents or retained and accounted for future visits. Visit Leaders are encouraged to plan small 'upgrades' into the latter part of a trip where a surplus is expected. This is where a leader will have 2 alternative plans based purely on cost e.g., meal option 1 or meal option 2. Otherwise, Leaders who realise as the trip is ending that they have a surplus should spend it on the attendees e.g., a snack break paid for by the trip funds rather than out of pupils' pockets as originally planned. This is a relatively fair way to distribute any small surplus.

14 Visits Evaluation and Monitoring

Our governors are expected to regularly monitor the implementation of our policies and procedures for LOtC in line with OEAP guidance [3.2b Monitoring](#) (good practice guide to monitoring LOtC for safety and quality); [4.2c Reviewing](#) (guide to the process of reflecting on an experience to learn from it and using it with participants to facilitate their learning and development, and with staff to develop practice); and [5.1d Evaluation](#) (guide to visits evaluation considering why, what, and how to evaluate). They do this mainly by using reports to them from the Head teacher or EVC and section 4 of the [KAHSC Governor Monitoring Pack \(Autumn\)](#).

15 Further Guidance

OEAP: Visit leader should bookmark [All documents | \(oeapng.info\)](#). The "Making the Case" section at the bottom contains a wealth of research and guidance on good practice.

THE GILLFORD CENTRE- Key Stages 1-4

Standard Operating Procedures (SOP) for Category 1 Visits

These procedures apply to all Category 1 visits for Key Stages 1 and 2. There are separate procedures for Early Years.

They are a record of the measures resulting from risk assessments of the locations and activities concerned. They apply in addition to all normal school policies and procedures.

This SOP has been put in place so that Category 1 visits can take place with the minimum of fuss, and can happen frequently, at short notice, or even spontaneously.

1 Category 1 Visits

Category 1 Visits at Hometown Primary School include all visits and activities with pupils that take place off the school site and also meet all the following criteria:

- Take place within the Local Learning Area or at one of the specific locations listed below;
- Do not involve adventure activities (as defined in our Off-site Visits Procedures) unless specifically included in these procedures;
- Take place wholly within the normal school day, departing after morning assembly and registration and returning to school by 3.15pm (although some after-school sports fixtures are included in Category 1 – see below).

All other visits fall into Category 2, and their details should be submitted using SORTIE for approval by the Headteacher.

2 Local Learning Area

The Local Learning Area is defined on the accompanying map. It includes Hometown Park, Hometown Wood, Hometown Library, Hometown Church, and a short stretch of the National Canal.

Site-specific information about some of these places is provided in Section 14 below.

3 Staffing

This school aims to ensure as many teachers, other staff and volunteers as possible are approved by the Headteacher to lead Category 1 visits, or to assist, and the school office maintains the approved list. The approval process involves vetting (including a DBS check) by the Headteacher, induction and familiarisation by the EVC, and refresher training as necessary.

All visits must be led by an approved leader, accompanied by at least one approved assistant.

The maximum number of pupils per group is 30. If possible, large groups should be split into smaller groups.

If any pupils need individual support or are likely to exhibit challenging behaviour, the visit leader should arrange for additional appropriate staff or volunteers (e.g., parents or governors) to accompany the group. Such staff must be vetted by the Headteacher but are not required to have a DBS check as they will be under reasonable and ongoing supervision by the visit leader or other approved staff.

4 Emergency Contacts

Three senior staff normally act as Emergency Contacts: the Headteacher, the Deputy Headteacher and the EVC. Their mobile numbers are on the school's Emergency Procedures for Visit Leaders.

It is the responsibility of the EVC to coordinate a rota so that one of them is on duty every day, on site, at all times during the school day to cover Category 1 Visits (including visits arranged at short notice). The other two must remain contactable, even if offsite, as a backup.

The name of the duty Emergency Contact is displayed in the office.

At the end of the day, the duty Emergency Contact must check whether all groups have returned and remain on site until they have.

5 Planning Ahead

Planned visits should be entered into the school diary. When planning a visit, leaders should check the diary to ensure that there are no clashes with other planned visits or events.

6 Before Departure

The visit leader should check:

- the weather forecast and adjust plans accordingly. Visits should not normally go ahead if a Met Office amber or red weather warning is in place.
- whether there are any other changes to the norm which might affect the visit – for example, road works or a local event.
- They have asked the office for a management system print of the full group list that includes:
 - The names of all pupils participating in the visit;
 - The names of all staff on the visit;
 - Relevant information about medical conditions, disabilities, needs, allergies, etc.
 - Staff mobile numbers (check these!);
 - The destination and planned activities;
 - The date and planned return time;and have checked that the names of any pupils not participating have been crossed out & other important information added. A copy should be given to each assistant.
- Personal information subject to UK GDPR can be kept securely and shredded or securely stored afterwards.
- That they, and each key assistant should also carry their personal mobile (fully charged) and a copy of the school's Emergency Procedures for Visit Leaders.
- Whether any pupils have conditions which might require medicines during the visit and whether we can follow school policies on administration while off-site e.g., that pupils who need them are carrying their personal asthma inhaler or adrenaline auto-injector, any personal spare they have and the school spare if available.

7 On Departure

On departure the visit leader must place a copy of the group list in the 'Today's Visits' folder in the office, and directly inform the duty Emergency Contact of their departure and planned return time.

8 During the Visit

At frequent intervals during the visit, and when getting on and off transport or entering or leaving a venue, the visit leader must conduct a headcount or otherwise check that all members of the group are present.

Staff should remain alert and observant for hazards such as dog faeces, hazardous litter, and unexpected occurrences.

If the group is delayed and is likely to be late returning, the visit leader must inform the duty Emergency Contact.

9 On Return

On return, the visit leader must directly inform the duty Emergency Contact of their return. The Emergency Contact should remove the group list from the 'Today's Visits' folder and file it in the 'Past Visits' folder.

The visit leader should report any incidents, observations or concerns (including any information that should be added to these procedures) to the EVC, in addition to any reporting of them required by the school's normal policies.

10 Travel and Transport

It is normally possible to walk to any location in the Local Learning Area within 15 minutes from school. The recommended walking routes and road crossing points are marked on the map:

- All pupils should be taught the Green Cross Code;
- All road crossing should be directly supervised – before leaving school, groups should be familiar with the hand signals that staff will use;
- Main Road must be crossed only at the official pedestrian crossings;
- Any pupils with disabilities (including difficulties with mobility, hearing or sight) should be given appropriate supervision or support, especially when crossing roads).

The school minibus may be driven only by approved drivers, who must follow the school's minibus operating procedure. There should always be another staff member in the minibus, responsible for group supervision. The minibus should not normally be used for visits within the Local Learning Area, except when needed for pupils or staff with disabilities.

Travel to the specific locations outside the Local Learning Area that are included in Category 1 should be by school minibus or by coach booked by the school office from one of the approved providers.

Although the use of public transport and cycling is encouraged, such visits are not in Category 1 because they require specific planning.

11 First Aid

The visit leader or an assistant should carry a first aid kit. Travel first aid kits are available in the office.

12 Parental Information and Consent

Parental consent is not required for Category 1 visits, except for sporting fixtures after school hours, so we include fixtures in the blanket consent form parents are asked to complete when a child changes key stages.

Parents have the right to withdraw their children from religious or sex education so, if a visit is planned to include these topics, parents must be informed about what is involved.

At the start of every school year, parents are informed:

- That the school curriculum includes routine offsite visits during the school day;
- That they will not normally be informed in advance about specific visits during the school day unless they are outside the Local Learning Area, or if pupils will be offsite for lunch.
- That children should always bring to school clothing and footwear suitable for learning outdoors in the Local Learning Area in the prevailing weather conditions;
- About arrangements for regular swimming lessons at Othertown Swimming Pool.

13 Clothing

The visit leader must ensure that pupils have clothing and footwear suitable for the weather. Some spare clothing, waterproofs and wellington boots are kept in the storeroom for pupils who do not have their own.

14 Local Learning Area - Site Specific Information

Hometown Park

- There are some isolated large trees – these should be avoided in high winds or if there is a chance of lightning;
- Orienteering in the park, using the school's orienteering map, is included in Category 1.

Hometown Wood

- This should be avoided in high winds;
- There are some patches of stinging nettles and brambles;
- Pupils should not run in the woods, as there are many trip hazards and branches at eye level.
- In the south part of the wood there is poor mobile phone coverage on some networks, but there is a good signal on all networks at the entrance.

Canal

- Visit leaders planning to take a group to the canal towpath must have undertaken the staff training provided by the EVC – this covers the hazards present at the canal, and the use from the towpath of available equipment to rescue anyone who falls in.
- Any activity on the water is not in Category 1.

15 Category 1 Visits Outside the Local Learning Area

Visits to the following locations are included in Category 1, provided that the visit has been arranged in advance with the venue:

- Othertown Museum;
- Othertown Academy;
- Othertown Theatre;
- Othertown Swimming Pool, for scheduled lessons provided by the pool instructors.

When visiting these venues, pupils must be dropped off and picked up immediately outside them and be directly supervised while walking between the transport and the venue.

Any visit which involves going elsewhere in Othertown is not in Category 1.

Staff accompanying pupils to swimming lessons must receive a briefing from the Head of PE about their role.

16 After-School Sports Fixtures

The procedure for after-schools sports fixtures is the same as for other visits except as described below.

For each fixture, the Head of PE is responsible for:

- Arranging transport and staffing;
- Liaising with the office to ensure that consent has been obtained for each pupil involved, and that parents are informed in advance about fixtures affecting their child, including the location, transport arrangements, staffing, kit required and the expected time of return to school;
- Producing and distributing a group list as described above;
- Liaising with the EVC to nominate an Emergency Contact.

17 Map of Local Learning Area

This map will show the school and at least all locations listed in section 2 and 14.