



PORTICO
ACADEMY TRUST

opening doors, unlocking potential

Educational Visits Policy

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Signature of Chair of Trustees _____ Date _____	Signature of Chief Executive Officer _____ Date _____
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Educational Visits Policy

Overview

Portico Academy Trust acknowledges the great value of Educational Visits in broadening and enhancing both the learning and social experience of children.

Under statutory guidance, all schools are required to have a named Educational Visits Co-ordinator (EVC), who will ensure that the planning and supervision of all visits and adventurous activities meet the DfE requirements. They should be trained to fulfil their role and maintain up to date knowledge and skills in relation to educational visits and outdoor learning.

Each school uses a range of resources including the LA administered EVOLVE website to record and risk assess each relevant visit. The site contains a range of resources and guidance materials to support staff when planning learning outside the classroom.

This policy complies with the Southend Borough Council policy (see appendix 1) on learning outside the classroom and the Outdoor Educational Advisors' Panel (OEAP) and has adopted their systems and processes for supporting and monitoring LOTc activities. Both these documents are available to staff organising trips on the EVOLVE website.

All staff responsible for organising educational trips must read this policy and follow the guidance contained here and on the EVOLVE website. Staff must ensure they follow the most up to date guidance and liaise with the school's EVC if they need further information or advice.

Approval for Visits

All matters regarding each visit outside school – feasibility, planning, safety, organisation etc – will require the prior approval of the EVC.

Approval of 'normal' day visits is at the discretion of the EVC. However; visits which are either:

- overseas
- residential or
- involving an adventurous activity (as defined in SBCs Visits Guidance)

will require the additional approval of the head and the Trustees of Portico Multi Academy Trust. Requests to undertake a residential visit should be presented to the Trustees at the start of the academic year in which the residential visit is to take place. All residential visits also will need approval for Southend Borough Council Evolve panel.

Guidelines

The organisation of an educational visit is crucial to its success. With rigorous organisation and control, a visit should provide a rich, learning experience for the pupils.

The following guidelines support the planning and implementation of educational visits organised by schools within the Portico Multi Academy Trust.

The Educational Visits Co-ordinator (EVC) will ensure that:

- there is a suitable group leader
- all necessary actions have been completed before the visit begins
- a risk assessment is complete and that it is safe to make the visit
- the group leader has experience in supervising and controlling the age groups going on the visit and will organise the group effectively
- the group leader has relevant skills, qualifications and experience if acting as an instructor, and knows the location of the activity
- all external supervisors on the visit are appropriate people to supervise children and have had the appropriate DBS checks
- Portico Academy Trustees have approved visits where necessary (e.g. residentials) and have the dates of these visits
- parents/carers have given consent
- arrangements have been made for all the medical needs and special educational needs of all the children
- the mode of travel is appropriate
- travel times out and back are known
- there is adequate and relevant insurance cover
- all costings for visit have been calculated ensuring school does not make a loss on a visit or trip
- the school has the address and phone number of the visit's venue and they have the names of all the adults and pupils in the travelling group

Competence to Lead

Any member of staff leading a visit will need to have their 'competence to lead' assessed before approval for the visit is given. For the majority of visits this will be assessed by the EVC.

If a member of staff will lead an activity which requires specialist skills (eg: skiing or canoeing) it is essential that they hold nationally recognised qualifications and have an appropriate level of experience.

The group leader is responsible for ensuring the overall supervision and conduct of the visit. The group leader should:

- be able to control and lead pupils of the relevant age range
- be suitably qualified if instructing an activity and be conversant in the good practice for that activity if not
- undertake and complete the planning and preparation of the visit including the briefing of group members and parents
- undertake and complete a risk assessment
- have regard to the health and safety of the group at all times
- know all the pupils proposed for the visit to assess their suitability
- observe the guidance set out for teachers and other adults below
- ensure that pupils understand their responsibilities

Other teachers and adults involved in a visit

Teachers on school-led visits act as employees of the Portico Academy Trust. They will therefore be acting in the course of their normal employment during their normal hours. They will be acting under an agreement with their head and governors if some of their time on the visit falls outside normal hours.

Reasons for Visits

It is essential that all visits have sound and clearly stated educational aims.

Planning off-site visits

Whether the visit is to a local park, museum, swimming pool, or includes a residential stay, it is essential that careful planning takes place. This involves considering the dangers and difficulties which may arise and making plans to avoid them.

The head is responsible for all off-site visits. In practice, the detailed planning is delegated to the EVC or the group leader, but the head must be satisfied that the person planning the visit is qualified to do so and has the necessary experience.

Assessment of Risk

'Risk assessment' is a careful examination of what could cause harm to pupils, staff or others, together with an identification of the control measures necessary in order to reduce risks to a level which, in the professional judgement of the assessor, is deemed to be acceptable (ie. low).

In considering risk, there are 3 levels of which visit leaders should be mindful:

- Generic Risks – normal risks attached to any activity out of school. These will be covered by careful completion of each school's 'Educational Visits Checklist'.
- Event Specific Risk – any significant hazard or risk relating to the specific activity and outside the scope of item 1 above.
- Ongoing Risk – the monitoring of risks throughout the actual visit as circumstances change.

Despite the most detailed pre-visit planning, things can go wrong on the day, e.g. parent helper is unavailable, member of staff is ill, transport fails to arrive, museum have lost booking, etc. To avoid having to make important decisions under pressure, it is important that some advanced thinking is done to cater for any foreseeable eventuality. Further details on risk assessment can be found on the EVOLVE and OEAP websites.

The group leader should take the following factors into consideration when assessing the risks:

- the type of activity and the level at which it is being undertaken
- the location
- the competence, experience and qualifications of supervisory staff
- the group members' age, competence, fitness and temperament
- pupils with special educational or medical needs
- the quality and suitability of available equipment seasonal conditions, weather and timing

The group leader and other supervisors should continually reassess the risks throughout the visit and take appropriate action if pupils are in danger.

Exploratory visit

Wherever possible the group leader should undertake an exploratory visit to:

- ensure that the venue is suitable to meet the aims and objectives
- assess potential areas and levels of risk
- ensure that the venue can cater for the needs of the staff and pupils
- ensure that the group leader is familiar with the area

If it is not feasible to carry out an exploratory visit, a minimum measure should be to contact the venue, seeking assurances about the venue's appropriateness for the visiting group.

Staffing Ratios

A professional judgement must be made by the Visit Leader and EVC as to the appropriate ratio for each visit.

A higher ratio of adults to children may be necessary and in some cases a one to one arrangement may apply to a specific child. These decisions will be determined by:

- Gender, age and ability of the group
- type, duration and level of activity
- needs of individuals within the group (SEN, behaviour, etc.)
- experience and competence of staff and accompanying adults
- nature of the venue
- weather conditions at the time of year
- nature of transport involved

Recommended day visit ratios (dependent upon the above criteria):

Early Years: 1 adult per 6 children

Key stage 1: 1 adult per 6 children

Key stage 2

- One class: (approximately 30 pupils) = 3 adults
- More than one class: First 20 pupils = 2 adults + 1 extra for each additional 15 pupils or less.

Supervision

Pupils must be supervised throughout all visits.

Role of Supervising Adults

Supervising adults must be fully briefed on the programme, venue, activities, timetable for the day, supervision arrangements and their responsibilities. They must also be given a written list of the pupils in their immediate care. They must be made aware of any risks and how these are to be removed or reduced.

Teachers on the visit must:

- do their best to ensure the health and safety of everyone in the group
- care for each individual pupil as any reasonable parent would
- follow the instructions of the leader and help with control and discipline
- consider stopping the visit or the activity if they think the risk to the health or safety of the pupils in their charge is unacceptable.

Panic Card

Emergency procedures should be discussed with the supervising adults before the day of the visit. All group leaders should carry a 'Panic Card' containing emergency procedures and contact numbers.

Role of Supervising Parents

Supervising parents must be fully briefed on the programme, venue, activities, supervision arrangements and their responsibilities. They must also be given a written list of the pupils in their immediate care. Parents do not need a full DBS disclosure as long as they are under supervision of the teacher at all times. Any trips where a parent/helper may be left to supervise pupils on their own MUST have a full DBS disclosure held by the school. Parents without a full DBS disclosure will be given a copy of our safeguarding procedures and are expected to return a copy of the "Confirmation of Receipt of Safeguarding Procedures" document. These will then be stored in class profiles, to be sent up to the next class teacher. Any helpers on residential trips must also hold a full DBS disclosure carried out by the school. Copies of old DBS checks are not valid.

Responsibilities of pupils

The group leader should make it clear to pupils that they must:

- not take unnecessary risks
- follow the instructions of the leader and other adults
- dress and behave sensibly and responsibly
- look out for anything that might hurt or threaten anyone in the group and tell the group leader about it
- not undertake any task that they fear or that they think will be dangerous

Any pupils whose behaviour may be considered to be a danger to themselves or to the group may be stopped from going on the visit. The curricular aims of the visit for these pupils should be fulfilled in other ways.

First Aid

The level of first aid provision should be based on risk assessment. On all visits there should be a member of staff who has a good working knowledge of first aid. One first aider with at least the Emergency First Aid at Work certificate should be present. For Reception age children this should be the two day Paediatric First Aid certificate. First aid kits are available for each class. A kit should be taken for each group if they are at a distance from each other. Inhalers or other relevant medicines must be included and checked by the class teacher before the trip commences.

Transport

Travel arrangements should be included in the risk assessment. If public transport is to be used, all pupils and supervisors must be fully briefed as to procedures on platforms, at bus stops, on busy streets etc.

If travel is by coach or minibus, all pupils must wear a seat belt. Staff must ensure that pupils comply with this rule and staff must check the belts before moving off. If a minibus is being borrowed or hired, the driver must have passed the LBWF test for the driving of council vehicles or the equivalent Community Transport test.

Travel by private car would need to be discussed with the EVC in advance.

Water 'Margin' Activities

Where pupils might participate in learning activities near or in water, such as a walk along a riverbank or seashore, collecting samples in ponds or streams, or paddling or walking in gentle, shallow water, then the guidance contained in OEAP 'Group Safety at Water Margins' is relevant. A copy of this is available on the EVOLVE website or from the EVC.

Residential Visits

The school must consider the following:

- the staff's accommodation should be in close proximity to that of the children and the children should be aware where they can find staff if there is a problem
- the immediate accommodation area should be exclusively for the use of the group
- access by staff to children's rooms must be available at all times – doors should not be locked
- separate male and female sleeping areas for children and adults
- ensure that the whole party are aware of the lay-out of the accommodation and its fire procedures
- security arrangements should be in force to stop unauthorised visitors
- storage of clothes and luggage - particularly safekeeping of valuables
- provision for disabled pupils or those with special needs
- safety in rooms (electrical connections, secure balconies)
- recreational accommodation and facilities for the group

Whilst carrying out their duties, no adults should be under the influence of alcohol.

In the case of trips other than 'local trips', parents should be made fully aware of any likely risks within the visit and their management, so they may consent or refuse on a fully informed basis (known as 'Acknowledgement of Risk').

Seeking Parental Consent

Parents/**carers** need to be aware that the teachers on the visit will be acting in their place – in ‘loco parentis’ – and will be exercising the same care that a prudent parent would. The following information should be included in the letter to parents/**carers** prior to a visit:

- dates of the visit
- times of departure and return
- mode of travel
- details of accommodation with supervisory arrangements on site
- details of the activities planned
- clothing and equipment to be taken

Charging for visits (guidance from HASPEV)

The education provided wholly or mainly during school hours is free. This means that the head may not impose a charge on parents for any visit that occurs during school hours. The head may, however, ask for a voluntary contribution.

Parents should be made aware that the contribution is not compulsory, and the children of parents who do not contribute may not be discriminated against. In the last resort, the visit may have to be cancelled if there are not enough voluntary contributions and the shortfall cannot be made up. The head may, however, charge parents for board and lodging on residential visits as well as the full costs when a visit is deemed to be an ‘optional extra’.

Parents must:

- provide the group leader with emergency contact numbers
- sign the consent form
- provide relevant information about their child’s health which might be relevant to the visit

The reply slip giving consent should read:-

“I give permission for my child _____ to take part in I have read and understand the information about the visit. I enclose my voluntary contribution.”

In the case of sports fixtures, the reply slip should read:-

“My child _____ is able to play in the match (at) on

I have read and understand the information in the letter, and give permission for my child to take part.”

Before the Visit

Once approved by the identified senior leader, the member of staff organising the trip must arrange the completion of a school risk assessment, with reference to the ‘Portico Assessment of Risk’ forms available in school. An itinerary and timetable for the day should also be completed at the earliest opportunity for the planned trip. A trip involving the use of transport (other than local sports trips) should be submitted to EVOLVE.

After the Visit

It is important that after each visit a debrief takes place. This should take place within a week of the visit date. The purpose is to identify what went well and what could have been done better, in order to inform future planning. If necessary any concerns should be shared with the EVC in order to prevent future risks and inform decisions.

National and Local Guidance

This policy has been informed by the guidance provided in Southend's 'Policy for the Safety Management of Learning Outside of the Classroom' and by Outdoor Education Adviser's Panel (*OEAP*) in relation to learning outside the classroom and visits.



Policy for the Safety Management of Learning Outside of the Classroom

1. Provision of Employer Guidance

Southend Borough Council has adopted the “**Outdoor Education Adviser’s Panel National Guidance (OEAPNG)**” which together with this document becomes “**Southend’s Health and Safety Policy for learning Outside of the Classroom**”. Additional guidance based on the staffing ratios previously recommended for visits offsite (other than sports/PE) is given in Section 12 of this document.

Please Note: This replaces SBC Health and Safety Code of Practice 5.2 which covered Educational Visits only

The OEAP National Guidance is located on a website at the following address, <http://oeapeg.info>, alternatively, there is a link from the Council’s “EVOLVE” website (www.southendvisits.org.uk)

It is a legal expectation that employees **must** work within the requirements of their employer’s guidance; therefore employees of Portico Academy Trust engaged in the delivery of learning Outside of the Classroom activities (on or off the school site) **MUST** adhere to the guidance given on the OEAPNG website as well as the requirements of this Policy Statement.

Where another employer (such as the Governing Body of a Foundation School or Academy) wishes to opt into Southend guidance, systems and processes for supporting and monitoring LOtC activities, they should produce a policy statement which makes this clear.

Where a Southend employee commissions LOtC activity, they must ensure that such commissioned agent has: adopted Southend’s Employer Guidance or; has systems and procedures in place where the standards are not less than those required by Southend’s Employer Guidance.

2. Scope and Remit

The OEAP National Guidance documents ‘*Essential Reading – Status, Rationale and Remit*’ clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base;
- direct supervision of young people undertaking experiences that fall within the remit of Learning Outside the Classroom;
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base;

- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base;

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the OEAPNG document: ***“Underpinning Legal Framework”***

3. Ensuring Understanding of Basic Requirements

As an employer, **Portico Academy Trust** is required to ensure that its employees are provided with

- appropriate guidance relating to visits and LOTC activity;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from appointed Advisers that have proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the safe management of outdoor learning and LOTC in Southend is the LOTC Employer Guidance web site, taken together with this document.

e.g. The relevant training courses in Southend are:

1. Southend Educational Visit Coordinator (EVC) Training - all of Southend Children’s Services’ establishments are required to have a current, Southend-trained EVC, in post.
2. Southend Educational Visit Coordinator (EVC) Revalidation - all Southend Children’s Services establishments are required to ensure that their EVC undertakes a formal revalidation every five years.
3. Southend Visit Leader Training – this course is strongly recommended for everyone leading LOTC activities.

For the purposes of day-to-day updating of information, Southend EVCs and Visit / Activity Leaders are directed to the “news” pages in the “Guidance” section of the SBC EVOLVE website:

www.southendvisits.org.uk

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their establishment’s Educational Visits Coordinator (EVC), or the adviser nominated by their employer.

The School Visits Advisor for Southend Borough Council is: Carol Parker

Telephone: 01702 534718

E-mail carolparker@southend.gov.uk

4. Approval and Notification of Activities and Visits

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

Southend uses the EVOLVE online system for notification and approval of School Visits. A key feature of this system is that visits and LOtC activities requiring approval are automatically brought to the attention of the Local Authority. Those visits and activities not requiring approval may be viewed, sampled or monitored using the database and diary facilities of the system.

It is a requirement that Schools and other educational establishments which are part of Southend Learning Services use the Evolve system; for further advice and help using the system, the establishment should contact the nominated adviser (see section 3)

5. Risk Management

As an employer, Portico has a legal duty to ensure that risks are managed - requiring them to be reduced to an “acceptable” or “tolerable” level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process. This requires that **proportional** (suitable and sufficient) risk management systems are in place, requiring Portico to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. Southend strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is “acceptable”. HSE endorse this approach through their “*Principles of Sensible Risk Management*” and advocate that it is important that young people are exposed to well-managed risks so that they learn how to manage risk for themselves.

There is no legal, or Portico, requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any **SIGNIFICANT RISK** i.e. those that may cause serious harm to an individual, or harm several people.

However, Southend EVC Training ensures that establishments are supplied with samples of suitable generic risk-benefit assessments, as well as exemplar event-specific assessments. These risk management materials can also be accessed through the EVOLVE website following web link: www.southendvisits.org.uk

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

6. Emergency Planning and Critical Incident Support

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

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

As an employer, Portico is committed to providing emergency planning procedures to support establishments in the event of a critical incident. Please refer to the SBC document “Managing a Critical Incident, 2014”

To activate support from Southend, the following telephone numbers should be used:

Normal office hours: 01702 215944

Outside normal office hours: 07769 700408

Or Keith Holden on 07769700408

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

7. Monitoring

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

8. Assessment of Leader Competence

OEAP National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of **Southend** Policy that all **Southend** leaders and their assistants have been assessed as competent to undertake such responsibilities as they have been assigned in line with the LOtC guidance.

9. Role-specific Requirements and Recommendations

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within Southend Department for People’s Services management structures. These are:

1. Director of Department for People
2. Head of Learning Services
3. Line Manager for the Outdoor Education Adviser - (School Visits Advisor)

4. Outdoor Education Adviser – (School Visits Advisor)
5. Adviser (other than an OEA) including Health and Safety Officer

Refer to individual OEAPNG documents headed as above.

OEAP National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within most Educational establishments. These are:

1. Trustees of Portico Academy Trust
2. Member of Local Governing Body or Management Board
3. Headteacher
4. Manager of an establishment other than a school
5. EVC
6. Visit or Activity Leader
7. Assistant Visit leader
8. Volunteer Adult Helper
9. Those in a position of Parental Authority

Refer to individual OEAP documents headed as above.

10. Charges for Off-site Activities and Visits

Southend Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996. The Department for Education (DfE) *Charging for School Activities (October 2014)* provides further departmental advice,.

Refer to OEAPNG document: 3.2C Charges for school activities (updated March 2014)

11. Vetting and CRB Checks

Portico employees who work *frequently* or *intensively* with, or have *regular access* to young people or vulnerable adults, must undergo a DBS enhanced CRB check as part of their recruitment process.

For the purposes of this guidance:

- *frequently* is defined as "once a week or more";
- *intensively* is defined as 4 days or more in a month or overnight.

However, it must be clearly understood that a DBS check (or other vetting procedure) in itself, is Educational Visits Policy

no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

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

12. Requirement to Ensure Effective Supervision

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

Effective supervision should be determined by proper consideration of:

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

The following levels of supervision (in blue) have been recommended in the past for visits from Southend schools by SBC. Please use these for guidance ONLY and, be prepared to vary them once you’ve made your own assessment based on the criteria listed above.

Visits of One Day or less

As a general guide, for visits to local historical sites, education centres, museums or local walks which last for one day or less, the staffing ratios should be:

- *Two adults for the first ten young people in school years 1 – 2 plus an additional adult for every, one to five, additional children, so, e.g.: 23 pupils would need 5 staff. However, all under 5s reception classes should have a higher ratio than this (to be agreed in advance by governors and Headteacher according to OfSTED and DfE guidance)).*
- *Two adults for up to twenty young people in school years 3 – 6 plus an additional adult for every, one to ten, additional young people; i.e. 5 members of staff for 23 young people*
- *Two adults for a group of up to 30 young people in year 7 onwards, plus an additional adult for every, one to fifteen, extra young people. Therefore, 2 members of staff would suffice for 23 young people*
- *Only one member of staff is needed to accompany a small group (up to 6) of young people in year ten (10) or above.*

Where the Visit is longer than One Day

As a general rule, a mixed gender party should, whenever possible, be accompanied by supervising adults of both genders. The minimum staffing levels should be as follows:

- *At least two adults for up to five young people in years 1 – 2, plus an additional adult for every, one to five, additional children. For example, 6 adults for 23 children*

- *At least two adults for up to fifteen young people in years 3 – 6, plus an additional adult for each, one to ten, young people. i.e., 3 adults for a group of 23 young people*
- *Two adults for a group of up to twenty young people in year 7 and above, with one additional adult for each extra, one to fifteen, young people. (Still requires three adults for a group of 23)*

Remote Supervision

- *Where the aim of a visit with older young people (Year 9 and above) is to promote independence and investigative skills, some of the time during the visit may be unsupervised. However:*
- *Supervisory staff have a duty to ensure, through adequate training and planning, that the young people are competent to operate with remote supervision.*
- *The supervisor retains responsibility for the young people in the group even when not in direct contact with them.*
- *Parents must be informed, in advance of the visit, of the arrangements that will be put in place to ensure the safety of the participants of visits where remote supervision will be used.*

However, as an exception to the above, the ratios for Early Years are **PRESCRIBED by the DfE in the Statutory Framework for the Early Years Foundation.**

Early years providers

- *For children aged under two:*
 - *there must be at least one member of staff for every three children;*
 - *at least one member of staff must hold a full and relevant level 3 qualification, and must be suitably experienced in working with children under two;*
 - *at least half of all other staff must hold a full and relevant level 2 qualification;*
 - *at least half of all staff must have received training that specifically addresses the care of babies; and*
 - *where there is an under two-year-olds' room, the member of staff in charge of that room must, in the judgement of the provider, have suitable experience of working with under twos.*
- *For children aged two:*
 - *there must be at least one member of staff for every four children;*
 - *at least one member of staff must hold a full and relevant level 3 qualification; and*
 - *at least half of all other staff must hold a full and relevant level 2 qualification.*
- *For children aged three and over in registered early years provision where a person with Qualified Teacher Status, Early Years Professional Status, Early Years Teacher Status or another suitable level 6 qualification is working directly with the children:*
 - *there must be at least one member of staff for every 13 children; and*
 - *at least one other member of staff must hold a full and relevant level 3 qualification.*

13. Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. Establishment policy should clarify the circumstances where a preliminary visit is a requirement.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy. Examples of such schemes include:

- The LOtC Quality Badge
- Adventurous Activities Licencing Authority (AALA) HSE
- Adventuremark
- National Governing Bodies (of Sport) centre approval schemes (applicable where the provision is a single, specialist activity).

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

14. Insurance for Off-site Activities and Visits

Employer's Liability Insurance is a statutory requirement and Portico holds a policy that indemnifies it against claims for compensation for bodily injury (where negligence can be proved) suffered by any person employed by it. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. Portico also holds Public Liability insurance, indemnifying it against all claims for compensation (where negligence can be proved) for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, property.

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

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

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

15. Inclusion

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

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

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
 - integration through participation with peers

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

Under the Disability Discrimination Act 1995, it is unlawful to:

- treat a disabled young person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

16. Adventure Activities Licensing Authority

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

The scheme is now the direct responsibility of HSE and operated through the Adventure Activities Licensing Authority (AALA). The definitive source of advice on the Licensing Regulations is to be found in the Health and Safety Executive publication: " **Guidance from the Licensing Authority on the Adventure Activities Licensing Regulations 2004**. The Activity Centres (Young Persons' Safety) Act 1995

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

17. Good Practice Requirements

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

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

LOtC Employer Guidance sets a clear standard to which Portico leaders **must** work. The guidance states:

“a competent Visit /Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:

- *Knowledge and understanding of their employer’s guidance supported by establishment-led training. It is good practice for employers to provide formal and accredited training to support their guidance e.g. EVC Training, Visit Leader Training and such training may be a requirement prescribed by some employers.*
- *Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.*
- *Knowledge and understanding of the group, the staff, the activity and the venue.*
- *Appropriate experience*
- *In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification.”*

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. Establishments should view the original documents and certificates when verifying leader’s qualifications, and not rely on photocopies.

Where a Volunteer Helper is a parent (or otherwise in a close relationship to of a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment.

Refer to OEAPNG document: **“Good Practice Basics”**

18. Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it and establishments **must** follow the specialist guidance provided in Southend’s transport policy. All national and local regulatory requirements **must** be followed.

The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

The Visit Leader should ensure that coaches and buses are hired from a reputable company.

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

Refer to OEAPNG document: **“Transport: General Considerations”**

Refer to OEAPNG document: **“Transport in Minibuses”**

Refer to OEAPNG document: **“Transport in Private Cars”**

Refer to OEAPNG document: **“Transport and child restraints”**

19. Planning

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

- The plan is based on establishment procedures and employer guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.

Please note: In the case of looked after children, formal consent may be needed from a Social Worker who has been authorised to perform this role.

- Visit leaders must ensure that participants take their essential medications on the visit and that these are managed appropriately to ensure their safekeeping
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

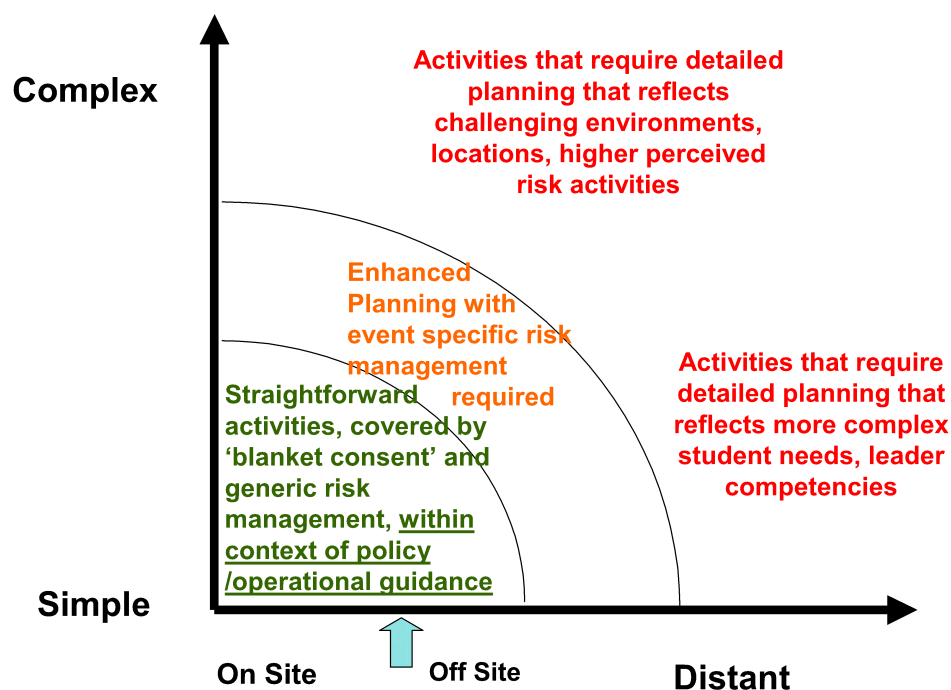
It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brain storming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any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

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

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

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

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



Refer to OEAPNG document: ***“Planning Basics”***

Refer to OEAPNG Power Point: ***“Planning Visits Off-site Activity and LOtC”***

20. The Value and Evaluation of LOtC

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

Refer to LOtC EG document: ***“Ofsted and LOtC Summary”***

However, it also highlights the finding that *even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigor* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the LOtC Employer Guidance document: ***“Rigorous Evaluation of LOtC: Meeting Ofsted Expectations and Assuring Quality”***