

Educational Visits and Learning Outside the Classroom



Section 1 – Purpose and Scope of this Document

1.1 Context

Ensuring the health and safety of pupils and staff on educational visits is a responsibility of the Council under the Health and Safety at Work Act.,1974.

Educational visits contribute to children and young people achieving higher standards in education, leading healthier lifestyles and having access to new activities and places.

1.2 Scope

These arrangements apply to all educational visits, activity centre visits and Learning Outside the Classroom (LOtC) activities involving children and young people where the Council is the employer or where the provision is commissioned by the Council. Governing Bodies in schools where they are the employer of staff (for example, Academies) will need to adopt these arrangements if receiving support and advice from the Council under the terms of a Service Level Agreement.

Educational visits are defined as events that involve children and young people being away from their normal school, centre or residential home premises, while in the care of the school or other service. This includes all outings, school trips, community-based activities and out-of-centre activities. For example, visits to local parks, museums, libraries and sports facilities; cultural, educational, recreational and exchange visits; sport and outdoor education activities outside the school/centre grounds; residential; field trips. These arrangements also apply to activities taking place in school grounds and to adventure activities taking place on school premises (such as climbing on school climbing walls).

Section 2 – Statement: Ensuring Good Practice

2.1 Adoption of National Guidance

Gateshead Council adopts the National Guidance published by the Outdoor Education Advisers Panel (OEAP) on the website { HYPERLINK "http://www.oeap.info" }. This provides detailed guidance about many aspects of off-site visits and outdoor learning and includes essential reading for all key staff roles.

Community schools, Voluntary Controlled schools, Council services and all Council employees must follow the OEAP National Guidance as well as the requirements in this document. These arrangements must also be followed by Voluntary Aided and Academy Schools that use Gateshead Council's services to support their educational and outdoor learning visits by means of a Service Level Agreement. Should there be any conflicts between the OEAP National Guidance and Council policies or arrangements, then the Council's arrangements must be followed, and clarification should be sought from your H&S Officer.

2.2 Managing Risk

Gateshead Council has a legal duty to ensure that risks are managed and to reduce them to an acceptable level. Risk cannot be entirely eliminated; it is a natural part of everyday life. As children and young people grow up, it is important that they learn to understand and manage risk and uncertainty for themselves, enabling them to cope with the uncertainties and challenges of adult life. Well-managed educational visits, including outdoor and adventurous activities, play a vital part in helping children and young people to learn about the real world and to understand and manage risks for themselves.

Schools and other services are therefore encouraged to provide such opportunities for children and young people. Good planning and management of activities should reduce risks to an acceptable level, considering the potential benefits to the young people involved. The starting point for a risk-benefit assessment should be an evaluation of the benefits that will be realised by the desired learning outcomes from the visit.

Risk assessment should be a common-sense process, focusing on significant risks, rather than trivial ones. Any significant findings of the risk assessment must be recorded; the process should not become a restrictive and onerous bureaucratic exercise. Further information about risk assessment can be found on the OEAP National Guidance website or in the Corporate H&S Handbook.

Employees who follow this advice, the OEAP National Guidance and who work within the limits of their own competence and use their common sense and professional judgement will be displaying good practice. As such, they will be fully supported by the Council if an accident occurs despite careful planning to manage foreseeable risks.

2.3 Advice, Guidance and Training

The Council recognises that it has a duty to provide advice, guidance and training to all staff involved in the management and provision of educational visits, enabling them to follow good practice. The Council will ensure that the following roles and responsibilities are fulfilled:

- 2.3.1 That an officer of the Council fulfils the role described in the OEAP National Guidance as **Outdoor Education Advisor**.
- 2.3.2 Promotion and need for an **Educational Visits Co-ordinator (EVC)**, as described by the OEAP, to provide support and advice to the staff in their school or service. This person is required to undertake the Educational Visits Co-ordinator training course every four years.

Details of the functions of these two roles can be found on the OEAP National Guidance website.

2.4 Notification and Approval of Educational Visits

Gateshead Council uses the Evolve online system for notification, approval and monitoring of visits. Evolve helps visit leaders to plan and record the details of their visits. It is expected that visit leaders will be responsible for entering the details of their visits on the system; **this is not an administrative task**.

Evolve enables EVCs, Head Teachers and Service Managers to plan, authorise and monitor visits within their establishments and to gain Council approval for certain visits as required within this document (see below). Critical information about a visit is available through Evolve to enable the Council and Emergency Services to provide an appropriate response in the event of an emergency.

For the purposes of notification and approval, educational visits are classified into three categories. The table below sets out the categories and the requirements for notification and approval in each case.

| Category | Definition | Notification & approval |
|---------------------|---|---|
| Routine local visit | Routine visit to a nearby local venue (such as park, library etc) within normal school / service hours and part of the normal curriculum covered by: <ul style="list-style-type: none"> • a written policy of the school or service concerned • school/service operating procedures • a generic risk assessment (regularly reviewed) • blanket parental consent | Evolve may be used but is not required. |
| Level 1 | Visits requiring an event-specific risk assessment including: <ul style="list-style-type: none"> • Visits requiring transport • Visits which are not routine or local • Visits outside normal school hours • Visits which are not routine local visits and not Level 2 | Must be entered on Evolve and approved by the EVC and school Head Teacher / Service Manager, normally at least two weeks before the visit. Evolve automatically sends notification of the visit to the Council. |
| Level 2 | Higher risk visits defined as: <ul style="list-style-type: none"> • Residential visits • Visits outside the UK • Visits which involve adventure activities or other higher-risk activities or remote or hazardous locations | Requires Council approval. Must be entered on Evolve and approved by the EVC and school Head Teacher / Service Manager at least four weeks before the visit and approved by a Health and Safety Officer before departure. |

The requirement for Level 2 visits to be authorised by Head Teachers / Managers at least four weeks prior to the visit allows time for any issues arising to be dealt with and for Council approval to be given. When a head teacher authorises a visit on Evolve, they are confirming that the visit conforms with the school and local authority requirements and that staff and any other people that are supervising are competent to do so and are suitable to attend the trip.

This task can only be the responsibility of the Headteacher/Senior Management, as the local authority does not have first-hand knowledge of the competence of the staff team or knowledge of the intended participants or knowledge of whether the activity is appropriate for the particular group.

The local authority therefore relies on the Headteacher to make an appropriate professional judgement prior to authorising visits, by taking all aspects into account, including but not limited to:

- The competence of the visit leader

- The competence of the accompanying staff
- The ages, level of maturity of pupils, including those with special needs
- The intended learning outcomes
- The proposed itinerary
- The contingency plans (Plan B) in place

The local authority works on the basis that the Headteacher would not have submitted the visit for approval if he/she was not satisfied with the intended arrangements. 'Approval by LA' therefore confirms that the school appears to have followed the local authority's stated procedures.

Although all visits requiring employer approval are viewed, it is not feasible for the LA to scrutinise in detail all information and attachments.

The exception to the above is where school staff lead adventurous activities themselves (ie. not using an external provider). In these instances, the headteacher cannot be expected to have the technical expertise required to assess the competence of the activity leader and therefore this task is carried out by the Local Authority.

For more complex visits, more time should be allowed. Schools / Services are advised not to sign contracts with providers or to make commitments to participants or parents until they are sure that requirements for approval can be met. It is a good idea to contact your H&S Officer at an early stage, before the visit is submitted on Evolve, to discuss visits with complex arrangements or significant risks, such as expeditions in remote areas overseas.

2.5 Definition of Adventure Activities

Adventure activities include any higher-risk activities, in addition to traditional Outdoor Education activities including:

- Abseiling
- Camping
- Caving and mine exploration
- Climbing (including indoor climbing walls)
- Coasteering, coastal scrambling, sea-level traversing
- Cycling on roads
- Fishing
- Forest School activities
- High level ropes activities
- Horse riding
- Go-karting
- Mountain biking
- River / gorge / ghyll walking or scrambling
- Shooting, archery, paintballing
- Skiing and snowboarding (including indoor or dry slope)
- Snorkel activities
- Swimming, (when not using UK public pools with lifeguards)
- Walking (hills, mountains, open country)
- Watersports – including canoeing / kayaking, rafting, rowing, sailing, surfing windsurfing, powered-craft (excluding commercial transport), water-skiing
- Activities in remote or hazardous locations (e.g. which includes areas more than 30 minutes walk from a road or refuge', coastal areas with significant tidal hazards, hazardous quarries, steep terrain)

This list is not exhaustive. If in doubt, advice should be obtained from your Health and Safety Officer.

2.102.8 Review & Evaluation

All visits should be reviewed after the event, with regard to any accidents, incidents or other significant occurrences during the visit, followed by any necessary review of procedures and / or risk assessments.

2.9 Monitoring of Compliance

The Council has a statutory duty to monitor compliance with these arrangements. Monitoring is carried out by the Health and Safety Officers through:

- A review of information on the Evolve system, including approval of Level 2 visits.
- Direct observation of visits in progress.

The monitoring process is intended to be positive, supportive and developmental. Constructive feedback and recommendations will be given. Areas of significant risk will be referred to the Head Teacher / Service Manager and high risk issues which cannot be resolved at the school / service level will be referred to the relevant Director.

Responsibilities of Schools / Services

3.1 Establishment Educational Visits

Schools and Council Services must consider how arrangements are implemented in practice.

3.1.1 Employers other than Gateshead Council

Where another employer (such as the Governing Body of a Voluntary Aided or Academy school) has adopted the provisions of these arrangements and Code of Practice, they should clearly state this in their own establishment's Health and Safety Policy.

3.1.2 Commissioned Services

If an organisation outside the Council is commissioned to provide a service which may include Educational Visits, it must have either adopted the provisions of these arrangements, including the OEAP National Guidance, or have its own procedures in place which at least meet the same standards.

3.2 Establishment Roles and Responsibilities

The School Head Teacher / Service Manager must ensure that they have appointed an Educational Visits Co-ordinator (EVC) who meets the role specification in the OEAP National Guidance or that they carry out this role themselves. They must also ensure that the person carrying out the EVC role undertakes the initial training provided by the Council and refresher training every four years subsequently.

The EVC is responsible for providing guidance and support to staff within their establishment, taking advice from the Health and Safety Officers if necessary. EVCs will normally be responsible for creating, maintaining and updating user accounts on Evolve for the staff in their establishment.

Although the EVC provides the first line in the establishment's system of quality control and approval of visits, Head Teachers / Service Managers have ultimate responsibility in their establishment for the authorisation of visits.

Headteachers / Service Managers are also responsible for ensuring that all Level 1 and Level 2 visits undertaken by the school or service are recorded on Evolve and that Level 2 visits gain Council approval before departure of a visit in accordance with these arrangements.

3.3 Assessing competence of Visit Leaders

In giving their authorisation for visits, Head Teachers / Service Managers must ensure that Visit Leaders and Group Leaders are competent to carry out their responsibilities. School / Service staff who wish to lead Adventure Activities must have approval to do so from the Health and Safety Officers on behalf of the Council. Approval will be based upon evidence of competence, which may include evidence of relevant qualifications,

training and experience or assessment by a Technical Adviser nominated by the Health and Safety Team. Evidence of qualifications should be uploaded to the staff member's Evolve user account.

Leader approval for adventure activities is managed through Evolve.

- For a specific visit, evidence of the leader's competence is required on the Activity Leader Form (ALF) which is part of the normal Evolve visit planning process.
- If a leader wishes to apply for generic approval to lead a specific adventure activity, then they should complete a Leader Approval Request (LAR) in Evolve for endorsement by their Head Teacher/Manager who submits it to the Council for approval. When this approval is given, it may be attached to future ALFs as evidence.

3.4 Monitoring standards on Educational Visits

Head Teachers / Service Managers are responsible for ensuring the monitoring of visits organised by their school / service. The OEAP National Guidance includes a document on monitoring. In case of doubt or concern, advice may be obtained from the Health and Safety Team.

As head teachers have overall responsibility for the safety of pupils while in and out of school, the Council takes the stance that it is not acceptable for staff to be under the influence of alcohol when professionally active and responsible for either pupils, parents, other colleagues and /or school property.

3.5 Emergency Planning and Critical Incidents

All establishments must have a plan to enable its staff to respond appropriately to any critical incident, i.e. where any participant:

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

The OEAP National Guidance provides information on Critical Incident Management and emergency procedures. There is also Corporate guidance available – EDU-HS-04 Emergency Management During Educational Visits.

Visit Leaders and Emergency Base Contacts are strongly advised to have a copy of the appropriate emergency card with them for reference during educational visits.

3.6 Accident/Incident Reporting

The Council's Incident Reporting Procedure must be followed. Serious incidents must be notified immediately to the Health & Safety Team on 0191 433 2270/2237/2236. If support is required from the Council, the Care Call Control Room should be contacted on 0191 478 7665, which is available 24 hours a day and includes emergency Health & Safety cover. These numbers should be carried by leaders during visits but should not be given to young people or to their parents.

After any incident, schools / services must undertake an investigation and amend their risk assessments and emergency procedures accordingly. It is also good practice to record and learn from 'near misses'. All incidents should be reported to the Health & Safety Team (using the HS20 form), who will investigate where appropriate to enable preventative strategies to be developed.

3.7 Assessing Venues and Providers

Individual Schools / Services have a responsibility to ensure any activity provider they use for educational visits meets suitable standards.

The Council has agreed that the Learning Outside the Classroom Quality Badge provides sufficient reassurance that a provider meets nationally required minimum standards of safety and quality. Details of a provider's status can be checked on the Quality Badge website { [HYPERLINK "http://www.lotcqualitybadge.org.uk" }](http://www.lotcqualitybadge.org.uk). If a provider of activities does not hold the Quality Badge, then detailed checks should be made to ensure that the provider meets required standards. The most straightforward way of doing this is to use a Provider Statement Form (available on Evolve). For providers that do not hold a LoTC badge, risk assessments will also be requested and other relevant documentation.

3.8 Insurance

See the OEAP National Guidance for general guidance about insurance for visits. The following is a summary of Gateshead Council's arrangements.

- **Indemnity**
The Council provides an indemnity to its employees against claims that arise as a result of carrying out their official duties. There are a small number of exceptions to this such as fraud, criminal offence etc.
- **Employers Liability**
The Council maintains these arrangements to cover its legal liability for claims arising from accidental injury to employees because of defective premises or equipment belonging to the Council. **It does not cover pupils.**
- **Public Liability**
The Council maintains these arrangements to cover its legal liability for claims arising from accidental injury to anyone who is not an employee and for loss or damage to property because of defective premises or equipment belonging to the Council.
- **Personal Injury**
The Council provides cover for employees who sustain bodily injury by assault whilst on official duties and for education employees who sustain bodily injury while carrying out extra-curricular teaching activities – this provides pre-determined benefits payable only in the event of serious injury or permanent disability. Employees may also have additional cover through their Conditions of Service and should check this for their own circumstances. Staff may wish to consider taking out less limited Personal Accident cover privately or through a professional association.
- **Personal property**
Other than the cover provided by the Public Liability insurance above, loss or damage to employees' or children's personal effects is not covered by Council

insurance. Employees should check whether they are covered by their conditions of service.

There is no cover in place for personal injury/property damage because of pupils/school staff participating in 'adventure' type activities whilst on a school trip to a location owned by a third party. The third party should have its own public liability insurance in place for this and proof of this should be obtained prior to the school visiting the venue.

If a school does not feel that the arrangements referred to above are sufficient for their requirements they will need to arrange their own cover. Schools should ensure that adequate insurance is in place for pupils/students.

Schools and other services should consider whether to arrange cancellation and personal accident cover for educational visits within the UK. Insurance should be arranged for journeys outside the UK.

When buying insurance cover from any source, the terms of the policy should be studied carefully, paying attention to the exclusions.

4 Further Information and Advice

Further information and advice is available from:

- Corporate Health & Safety Team
Lorraine Dixon 0191 433 2237, Heather Taylor 0191 433 2236
and Dasha Kormilkina 0191 433 2270