

## NORTH LINCOLNSHIRE COUNCIL

### CHILDREN, FAMILIES AND LEARNING CABINET MEMBER

#### EDUCATIONAL AND OFF-SITE VISITS POLICY AND GUIDANCE

##### 1. OBJECT AND KEY POINTS IN THIS REPORT

- 1.1 To seek the Cabinet Member's approval to publish and circulate to schools and educational establishments the Educational and Off-Sites Visits Policy and supporting practice guidance
- 1.2 The 'Educational *Off-Sites Visits Policy*' describes key principles the local authority (LA) will follow when managing the educational and off-site visits function. The supplementary guidance supports staff implementation of the policy to ensure trips continue to be undertaken safely.
- 1.3 The policy and practice guidance supports the local authority to meet its statutory duties to its employees as required under the Health and Safety at Work Act 1974.

##### 2.0 BACKGROUND INFORMATION

- 2.1 School and recreational visits are an important feature of a child's learning and education. Visits provide the opportunity of new learning environments and can help children to develop a range of new skills and experiences such as team working, confidence building and increased self-esteem.
- 2.1 North Lincolnshire Schools and academies run a number of activities ranging from overseas skiing trips to local nature walks. Over the last year approximately 2,650 visits were led by schools.
- 2.3 The current Educational and Off-Site Visits guidance document provides information to:
  - Guide staff through aspects of a visit including planning, leading and evaluating hazardous and non-hazardous visits.
  - Give staff members the confidence to plan a school visit, allowing young people to experience a range of activities outside the classroom.
  - Ensure that the authority meets its statutory duties under the Health and Safety at Work Act 1974.

- 2.2 The current Educational and Off-Site Visits guidance document is mandatory for establishments where the LA is the employer. Additionally, North Lincolnshire Council offers professional advice and guidance to schools and academies where the LA is not the employer through a service level agreement. Organisations that purchase the service level agreements are required to use the NLC Educational and Off-Site Visits Guidance document.
- 2.3 The Department for Education promote outdoor education stating that; 'Children should be able to experience a wide range of activities, Health and Safety measures should help them to do this safely, not stop them.' (DfE 2014)
- 2.4 Following a review of the current guidance document a new policy has been written with a supporting practice guidance document for use by staff responsible for organising educational visits.

### 3.0 OPTIONS FOR CONSIDERATION

- 3.1 **Option 1:** To approve that the *Educational and Off-Sites Visits Policy* is published and circulated to schools, academies and relevant internal services alongside the revised practice guidance.
- 3.2 **Option 2:** Not to approve the publication of the revised policy.

### 4.0 ANALYSIS OF OPTIONS

#### 4.1 Option 1:

- 4.1.1 The *Educational and Off-Sites Visits Policy* is a new document which describes how the LA enables establishments to plan and undertake visits safely. It provides clarity on roles and responsibilities and confirms what arrangements will be in place to monitor and audit visits. Having a separate documented policy in place makes sure that thorough consideration has been given to the key functions that should be undertaken. The policy can also be used to periodically monitor and assess compliance.
- 4.1.2 The policy is supported by a practice guidance document which includes a number of updates and enhancements such as:
- incorporating the latest guidance (DFE Advice on Health and Safety for schools, Feb 2014) and (Outdoor Education Advisers Panel National Guidance).
  - recommending ratio starting points for consideration at each key stage when planning supervision for a visit. (National guidance no longer prescribes set ratios)
  - including flow charts to guide staff through the process of recording category A and B visits on the Evolve system.
  - including emergency and critical incident procedures along with emergency action cards for staff responding to an incident/ accident.

- changes to the roles and responsibilities of staff involved in planning/ leading an educational visit.

4.1.3 The policy applies to local authority services, all community maintained schools and to academies and educational establishments where the visits SLA is purchased from the LA. For establishments where the LA is the employer the guidance is mandatory, which means it must be adopted by the governing board of each school. Where an establishment is accessing the LA educational visits service but the LA is not the employer, the guidance must also be adopted by the governing board.

#### 4.2 **Option 2:**

4.2.1 If the policy was not approved and the practice guidance not implemented, establishments would not benefit from the most up to date and relevant guidance for planning and running educational visits and the local authority would not be adopting best practice policy.

### 5. **RESOURCE IMPLICATIONS (FINANCIAL, STAFFING, PROPERTY, IT)**

5.1 **Finance:** None

### 6. **OUTCOME OF INTEGRATED IMPACT ASSESSMENT (IF APPLICABLE)**

6.1 An integrated impact assessment has been completed and no issues were identified.

6.2 **Statutory:** The *Educational and Off-site Visits Policy* supports the council to meet its statutory duties under the Health and Safety at Work Act 1974.

### 7. **OUTCOMES OF CONSULTATION AND CONFLICTS OF INTERESTS DECLARED**

7.1 The guidance has been considered by insurance professionals; health and safety professionals and educational visits co-ordinators in all of our schools and academies.

### 8. **RECOMMENDATIONS**

8.1 That the Cabinet Member approves option one to publish and circulate to schools the *Educational and Off-Sites Visits Policy* and supporting practice guidance.

DIRECTOR OF GOVERNANCE AND PARTNERSHIPS

North Lincolnshire Council  
Civic Centre  
Scunthorpe  
North Lincolnshire

Author: Steve Piper / Laura Harrison  
Date: 5 January 2017.

**Background Papers used in the preparation of this report:**

1. Health and Safety at Work Act 1974
2. DfE Health and safety: advice on legal duties and powers (2014)
3. Outdoor Education Advisers Panel – National Guidance (<http://oeapng.info/>)
4. North Lincolnshire Council - Educational and Off-Site Visits Policy (2017)



# **North Lincolnshire Council**

## **Educational and Off-Site Visits Policy**

Review Date:  
*February 2018*

# North Lincolnshire Council Educational Visits Policy

## 1.0 Introduction

1.1 North Lincolnshire Council (NLC) recognises the value of off-site visits and adventurous activities and fully supports and encourages those that are well planned and managed effectively. This policy sets out what the local authority (LA) will do to enable staff to assess and undertake educational visits safely.

## 2.0 Scope

2.1 This policy will apply when considering educational visit submissions from establishments where the local authority is the employer or establishments where the LA is providing the service under a SLA (see section 6 for differences regarding approvals).

## 3.0 Safety

3.1 The health, safety and welfare of children, learners, volunteers and employees is of paramount importance when arranging or leading a visit. No visit will be approved by the LA where it can be demonstrated that either:

- the 'Educational and Off-Site Visits Guidance' has not been followed and/or
- there is an unacceptable risk of harm.

3.2 The LA has a duty of care to look after their own and others health and safety under the Health and Safety at Work act 1974.

3.3 The LA, establishment staff and others also have a duty under the common law to take care of pupils in the same way that a prudent parent would do.

## 4.0 Advice and guidance

4.1 The LA has an important role to play in helping establishments plan and undertake visits safely. In order to facilitate this, the LA will:

- Have a designated Educational Visits Officer (EVO) function which will offer advice and guidance on planning and undertaking educational visits.
- Facilitate the EVO to attend relevant training (i.e. Outdoor Educational Advisers Panel), regional / national networking (may be virtual) and maintain a record of continuing professional development.
- Have in place a plan for dealing with emergencies.
- Provide guidance for staff to follow when planning and leading an educational visit.
- Provide additional advice and updates to establishments directly, where appropriate, regarding best practice.

## 5.0 Providing Training for Staff

5.1 The LA will provide training opportunities for establishment Educational Visits Co-ordinators (EVC). EVC's must undertake the Outdoor Education Advisory Panel certificated course.

- 5.2 The LA will provide training and support users to access the educational visits recording system (currently EVOLVE).
- 5.3 The LA will monitor attendance and notify the head teacher / manager when training has not been accessed.

## **6.0 Approvals and recommendations:**

- 6.1 The process for approving visits will depend on two factors: A) whether the visit is considered high or low risk and B) who is the employer (e.g. academy or maintained school/LA service). These are described below:

### **6.1.1 For maintained schools where the LA is the employer:**

- Details of all visits must be entered on the LA recording system (EVOLVE).
- The head teacher will have delegated powers to approve low risk visits (Category A). The LA will have an overview of low risk visits and may comment/make recommendations (where appropriate) to head teachers.
- The LA will be responsible for approving higher risk visits (Category B - adventurous, residential and overseas activities).
- It is a legal requirement that employees follow their employer's guidance. The Governing Board/Management Committee will be provided with a copy of the 'Educational Visits Guidance' for adoption and implementation.
- Advice and recommendations will be sent to schools via the Evolve system.

### **For maintained schools where the LA is not the employer, but the Governing Board adopt the LA guidance:**

- Details of all visits must be entered on the LA recording system (EVOLVE).
- The head teacher will have delegated powers to approve low risk visits (Category A). The LA will have an overview of low risk visits and may comment/make recommendations (where appropriate) to head teachers.
- The LA will make recommendations for approving higher risk visits (Category B - adventurous, residential and overseas activities).
- It is a legal requirement that employees follow their employer's guidance. The Governing Board/Foundation Trust will be provided with a copy of the 'LA Educational Visits Guidance' for adoption and implementation. Overall responsibility remains with the Governing Board/Foundation.
- Advice and recommendations will be sent to schools via the Evolve system.

### **6.2.1 For academies where the LA is not the employer, but the Educational Visits service of the LA has been purchased:**

- Details of all visits must be entered on the LA recording system (EVOLVE).
- The head teacher will have delegated powers to approve low risk visits (Category A). The LA will have an overview of low risk visits and may comment/make recommendations (where appropriate) to head teachers.
- The LA will make recommendations for approving higher risk visits (Category B - adventurous, residential and overseas activities). Overall responsibility remains with the academy.

- Where an establishment uses the LA's Educational Visits SLA, the school or academy will be required to adopt and implement the 'LA Educational Visits Guidance' and any other relevant / subsequent documents.
- Academies will be responsible for checking their employer's insurance arrangements.
- Advice and recommendations will be sent to academies via the Evolve system.

#### **For LA services where the LA is the employer:**

- Details of all visits must be entered on the LA recording system (EVOLVE).
- The service manager will have delegated powers to approve low risk visits (Category A). The EVO will have an overview of low risk visits and may comment/make recommendations (where appropriate) to service managers.
- The EVO will be responsible for approving higher risk visits (Category B - adventurous, residential and overseas activities).
- It is a legal requirement that employees follow their employer's guidance.
- Advice and recommendations will be sent to services via the Evolve system.

### **7.0 Quality Assurance:**

- 7.1 The LA encourages establishments to use providers that hold relevant quality badges/ accreditations (i.e. Learning Outside the Classroom (LOTC) quality badge, Adventurous Activities Licensing Authority (AALA) accreditation). When a provider does not hold an LOTC badge, establishments should complete the 'LA Provider Statement' to check that the provider meets the LA's minimum standards.

Where practical, establishments should undertake a preliminary visit to a new venue/provider to gather information and assess the educational benefits of a visit.

### **8.0 Public Liability**

For Cat A Visits – providers and travel hire companies must hold a minimum public liability insurance of £5m

For Cat B Visits – providers and travel hire companies must hold a minimum public liability insurance of £10m (wef 1.9.17)

### **9.0 Monitoring:**

- 9.1 The LA will periodically audit a sample of educational visit records, venues and providers.
- The LA will keep a record of site checks/ monitoring visits completed.
  - The LA will support establishments with monitoring/ evaluating visits.
  - The LA will monitor accidents and near misses recorded by establishments. Where appropriate, the LA will follow up the resulting actions and support establishments to undertake post incident investigations.

#### References:

1. Outdoor Education Advisers Panel– National Guidance (<http://oeapng.info/>)
2. Learning Outside the Classroom Quality Badge – LOTC (<http://lotcqualitybadge.org.uk/home>)
3. Adventure Activities Licensing Authority – AALA (<http://www.hse.gov.uk/aala/index.htm>)