



Cabot
Learning
Federation

School Trips and
Adventure Activities

Guidance and
Arrangements

Date Adopted: Date, Cabot Learning Federation
Implementation Date: Date October 19
Reviewed August 23

History of most recent significant Policy changes

Date	Page	Change	Origin of Change e.g., TU request, Change in legislation
Date	E.g., Whole Document	Detail of change	Reason for change
December 19	2.15	Zero tolerance in CLF on students and staff consuming alcohol, recreational drugs or legal highs.	CLF Executive decision based on an incident.
November 21	2.18	COVID-19 Contingency	Pandemic
November 21	4.5, 5.2 and 7.0	Signposting to Nimble courses on use of Evolve and Risk Assessment	Competence of staff
November 21	Appendix F	Contingency checklist for Residential/Foreign Trips for Covid	Pandemic Now removed
August 23	1.0	Reinforcement of the need to use the OEAP guidance which CLF follow when planning trips	Stronger message and signposting
August 23	1.0	Definition of Cat A, B and C visits early on in document	Clarity
August 23	2.8	Approval to take place at Academy level before being submitted to Trust	Clarity of process
August 23	2.11	Students not attending/known to the academy, not supported attending Academy trips	Clear message
August 23	2.6	Hybrid activities not defined by AALA	National guidance
August 23	2.25	Addition of preparing a Plan B in preparation for the trip	Dynamic assessment/ OEAP guidance
August 23	2.26	Ensuring an emergency plan is in place, referring to the Academy Critical incident plan, with emergency numbers published for both in and out of hours.	OEAP guidance
August 23	4.2	Addition of timescale of accredited EVC training every 3 years	OEAP guidance

August 23	4.2	Ensuring both Plan B are available and emergency procedures are in place	OEAP guidance
August 23	4.3	If any new activities taking place not undertaken before- check that correct level of competence either by provider is checked, or if member of staff leading-qualifications are checked.	OEAP Guidance/Best Practice
August 23	4.5	Hybrid Activities not defined by AALA but of adventurous nature	OEAP Guidance
August 23	4.8	Health and Safety team will randomly spot-check and challenge planning of all categories of trip	Best Practice
August 23	5.2	Staff leading trips must have undertaken risk assessment training and group leader training	OEAP Guidance
August 23	6.0	Addition of a model template and aide memoire for trips	Best Practice- ease of completion of risk assessments
August 23	6.0	All staff undertaking trip risk assessments must have undertaken risk assessment training available on Nimble and /or via EVC training or Group leader/ visit training	HASAWA, Management Regs, OEAP guidance
August 23	6.0	Copy of the risk assessments should be available at point of use on the trip	Best Practice
August 23	11.0	Reference of DSL re checking of students attending trips and contextual risk assessment	OEAP Guidance
August 23 New Section	15	Use of Travel cards (access to Funding whilst on the trip) for academy trips	CLF Finance
August 23	19	Exclusions around CLF Insurance	Policy
August 23 New section	22	Added section on selecting hired coaches/ minibuses from approved list within Evolve- An operator licence check has been undertaken and added to an approved list of providers	OEAP guidance

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1 Introduction

Young people can benefit enormously from taking part in offsite/outside learning away from the classroom. It gives them the opportunity to undergo experiences that they might not otherwise have had. Trips help to increase a child's investigative skills and can develop greater independence. Their learning unknowingly includes identifying risk, risk assessment and risk control all of which are essential life skills. In turn, this prepares a child or young adult to be risk aware and not risk averse.

This document is issued to provide advice and guidance on arranging Academy trips, and to signpost to the relevant and up to date National Guidance (OEAP), CLF follow the OEAP guidance, in order to meet our statutory duties in respect of off-site visits and trips. This is available within the resources tab of Evolve and **must** be referenced when planning your trips.

The majority of trips organised by academies take place without any incident or injuries occurring. This in part can be attributed to good planning and preparation, organisation and supervision. This guidance clearly sets the stage to create the right safe environment for preventing accidents or injuries, whilst still experiencing fun, excitement and controlling risks. The platform CLF use to plan and record all trips is Evolve, this is the school management system for offsite trips and visits.

No amount of planning can guarantee a trip will be totally incident free. However, good organisation and attention to safety measures can, and does, reduce the number of accidents and incidents, and will lessen the seriousness of those incidents/accidents that do happen.

Definition of trip categories

Category A - All these activities are normally low-risk and take place in an environment that usually presents no greater risks than those normally present in everyday life. e.g., Local area, parks shops, local field study etc.

Category B - Activities and ventures which incorporate some extra risk to the participants' visits to the beach, cycling, local museums, national trust etc.

Category C – All off-site visits including residential visits, trips overseas, excursions, outdoor and licensed adventurous activities.

For further example this is listed within the body of the document.

(Statement)

- 1.2 The Cabot Learning Federation (CLF) recognises the competence, experience and best practice of the Outdoor Education Advisory Panel (OEAP) and have adopted their national guidance for school trip management. Staff should follow the National guidance provided by the OEAP as well as the requirements set out in this procedure - <https://oeapng.info/> This link can also be found on the front page of the CLF Evolve System.
- 1.3 The CLF procedures are to be followed if there is conflict between CLF procedural guidance and the advice of the OEAP National guidance. For clarification, contact the Academy Education Trips Co-ordinator (EVC) or Central Health and Safety Team.
- 1.4 Employers, Principals, Managers, EVC and Group/ visit Leaders must have a basic understanding as to where and when the provision of Adventure Activities were legally regulated. The regulations require providers of certain activities to be licensed to provide these. These activities include caving, climbing,

trekking, and water sports. The licence provides an assurance of safety, it does not provide assurance of educational or activity quality.

- 1.5 Adventurous Activities come under the scope of the Adventure Activities licensing Regulations; these came into force in 1995 following the Lyme Bay tragedy. The logo for AALA is:



- 1.6 Some more adventurous activities that do not technically come under AALA but are still adventurous, (Hybrid activities not under AALA) e.g., water/rock activities plunge pooling, gyll scrambling (gorge walking) etc, should only be undertaken by accredited providers or member of staff can provide similar qualifications e.g., Caving, Mountain leader award summer/winter.
- 1.7 The LOtC Quality badge is the only national award assessing both the quality of risk management and educational provision across all types of learning outside the classroom providers including museums and castles, botanical gardens and city farms, theme parks and zoos, field study and adventure centres, and expeditions and study cultural tours abroad. It is recognised by the Department of Education.



- 1.8 All off site visits/trips including residential visits, excursions and outdoor adventure activities (Category C visits) are to be notified, checked and approved by the EVC and Principal, using the Evolve trip management system, before being sent the trust for assessment and final sign off.
- 1.9 Each off-site visit/trip, activity or event must have a designated and experienced group/ visit leader. The group/ visit leader has overall responsibility of the planning, and supervision and conduct of the visit/activity. They should be approved as competent and experienced to lead the trip, by the Principal and the EVC. A deputy leader must also be appointed, to take the lead should the need arise.
- 1.10 Every off-site visit/trip must be risk assessed, right from walks to local parks, through to complex overseas expeditions. A template for the risk assessments is located at the end of this document and on CLiF. [Trips Aide Memoire-2023.docx](#) and [CLF Risk Assessment - Academy trips TEMPLATE.docx](#)
- 1.11 CLF do not support students not known to or attending the school, or staff bringing their own children on the trip.
- 1.12 Clearly identified educational objectives appropriate to the age and the ability of the group, should be made early in the planning process.
- 1.13 Activity providers, whether commercial companies, voluntary organisations etc. will all have their operating procedures-these operating procedures will also outline risk assessments, required licences

staff competence qualification. Check that these procedures are in place if this organisation has not been used before or for a long time, by asking them to complete the provider declaration form **OE01**.

- 1.14 Ensure the trip is uploaded to Evolve with risk assessments itinerary and other information attached. **within the required timescales**, allowing for the various stages of approval required both internally at academy level and at Trust level.
- 1.15 Work within the guidance and standards of the trust guidance, the national guidance, OEAP, and guidance of the relevant National governing bodies.
- 1.16 Seek further advice from Central Health and safety team / National governing bodies where there is uncertainty about safe practice.
- 1.17 Good discipline is essential to the success of any visit/trip. Codes of conduct in relation to acceptable standards of behaviour on smoking, alcohol drugs etc., need to be clearly established, agreed, and enforced for all. CLF have a Zero tolerance policy on alcohol and recreational drugs, legal highs being consumed by any students **and** staff whilst on a school trip.
- 1.18 Appropriate personal and group equipment and clothing needs to be available to meet the needs and purpose of the visit.
- 1.19 Parents/Carers and students should be informed of arrangements in writing. All staff should be informed of all planning and risk assessments, and sign to say they have received and understood all planning and risk assessments, and clearly understand their role.
- 1.20 Rigorous contingency planning around infectious disease inc COVID, and student's and/or staff becoming unwell whilst on the trip. Also, research and an understanding of COVID measures in other countries if travelling abroad. (See checklist at appendix F)
- 1.21 Adequate supervision is required at all times based on assessment of the risks and abilities and needs of the group, whether this be of a direct or in-direct nature.
- 1.22 A pre-visit should be undertaken to the activity site to familiarise the group/ visit leader or staff with conditions. If this is not possible, gather adequate background information, previous experience, and on-site recce upon arrival.
- 1.23 Gather information from colleagues who have conducted similar visits, research their evaluations of the trip, and learn from any incidents or near misses.
- 1.24 Complete the evaluation of the trip on Evolve.
- 1.25 All planned activities will have had a 'Plan B' activity prepared and assessed, so that if dynamic assessment recognises the original activity cannot take place there are other options available.
- 1.26 An emergency plan is prepared, following the academy Critical Incident plan, with contact numbers published for both in and out of hours.
- 1.27 Parental consent for all trips is obtained and stored securely.

If new activities are introduced, you should seek that risk assessments have been undertaken and that staff competence and qualifications are checked. Seek further advice from the Health and Safety team to check qualifications for adventurous activities if school led as opposed to using a licenced provider.

For further information, please see the National guidance https://oeapng.info/search_gcse/?q=aala

2 Evolve (Schools Trips Management System) – Mandatory for CLF Academies

Evolve is an online tool for planning and managing educational trips. CLF has implemented this system for the management and approval of all school trips. Evolve must be used to document and manage all off-site trips, categories A, B and C (see categories below), and for the appropriate approval stages to be actioned.

Evolve should already be populated within your school and staff usernames and passwords shared. Contact your academy EVC if you cannot access Evolve and are leading a trip.

There are some additional forms and risk assessment templates, which will assist in the management of school trips but do sit outside of Evolve. For example, an initial trip proposal form will need to be completed and authorised ahead of a trip being organised, model parental consent form etc. See appendices at the end of this document.

For further information on Evolve, please see <http://national-library.info/>

3 Roles and Responsibilities

The CLF have adopted the Outdoor Education Advisory Panel National guidance in full. For an Academy EVC, Principal, Councillor, Group/ visit Leader, accompanying Staff and Volunteers and Students the CLF follows the roles as identified within the OEAP guidance.

For further guidance, please see https://oeapng.info/search_gcse/?q=establishment%20roles

3.0 Academy Education Visit Co-ordinator (EVC) – each Academy must have a trained (within the last three years) visit co-ordinator

For all off-site trips, the Academy EVC ensures:

- The Evolve school trips management system is used, and that trips are planned and approved within the proper time scales.
- Support/oversee planning so that well considered and prepared arrangements can lead to well-managed, engaging, relevant, enjoyable and memorable visits and outdoor learning.
- All staff are competent to undertake the trips being organised. Any concerns should be raised with the Principal or Health and Safety Team
- Suitable and sufficient risk assessments and proper planning of the school trip is being undertaken.
- Plan B should be attached and suitably assessed.
- Ensure that emergency arrangements are sufficient, and that there is an emergency contact for each visit – see OEAP National Guidance document 4.1d “Emergencies and Critical Incidents – Guidance for Establishments”;
- Correct levels of authorisation are taking place.
- For **on-site** activities that do not have residential/adventure activities as part of their activities, these can be authorised by the EVC. As long as the Principal/ SLT have given the okay at the proposal stage.

- This is not an exhaustive list please refer to 3.4j and 3.3a EVC Role and Checklist (available in the link below). <https://oeapng.info/evc/>

3.1 Principal

The principal has a responsibility to:

- Authorise all off-site school trips in all categories via the Evolve system;
- You have clearly designated either yourself or a suitable member of staff as the Educational Visits Coordinator (EVC)
- Ensure that timelines for approval are understood and applied;
- Ensure there are robust procedures in place for the management of school trips;
- Ensure all staff are following these procedures;
- Ensure staff are trained and competent to undertake school trips, and or if leading specific activities;
- Ensure students sign up to a safe Code of Conduct for the duration of the trip;
- Arrangements are in place for the Academy Council to be informed of such visits as required by your establishment's policy;
- If new activities are introduced, you should seek that risk assessments have been undertaken and that staff competence and qualifications are checked. Seek further advice from the Health and Safety team to check qualifications for adventurous activities if school led as opposed to using a licenced provider.
- **N.B** To permit the Central Health and Safety Team to approve Category C trips on behalf of CLF (residential, overseas and adventure activities), the principal **must** authorise the trip on Evolve at an academy level first, for the system to then pass the trip via Evolve to the H&S Manager.
- Ensure you refer to document 3.3b and 3.4g Head/Managers Checklist (available on the link below).
- For further guidance, please refer to: <https://oeapng.info/head-manager/>

3.2 Councillors

Councillors must, through scrutiny and friendly critical challenge ensure:

- There are formal notification and approval procedures that meet with employer recommendations and requirements, and you are clear about your role in these.
- The Academy are following the school trips guidance.
- The Academy are aware of the type of trips taking place.
- That a trained EVC is appointed.
- 'School Trips' form part of the standard agenda at the Academy Health and Safety committee meetings.

- Ensure you refer to document 3.3c 'Management Board and Governor Check List'.

For further guidance, please see <https://oeapng.info/governors/>

3.3 Group/ Visit Leader

The Group/ Visit Leader is the designated person responsible for the planning of a trip and has overall responsibility for the safety and conduct of the students and staff for the duration of the trip. Staff who lead a trip must have the relevant experience and skills required for the particular off-site trip they wish to run. You must:

- Be approved by the Principal/EVC to carry out the lead role, including for any specific activities you will lead. Be able to use the chosen environment or venue(s) to provide a wide range of learning or development outcomes.
- Has undertaken group/ visit leader training delivered externally via EduFocus please follow this link for training [UVLT – EVOLVE Advice](#)
- Liaise with your Educational Visits Co-ordinator (EVC) to ensure that the visit has clear aims and is planned to appropriately balance benefits and risks, and that all staff accompanying the visit meet establishment requirements.
- Ensure that there is effective supervision.
- If using external providers for Category C activities, ensure that these providers have the required national governing body accreditations and if applicable the required AALA licence as defined under the regulations.
- Category C type activities that fall outside of the scope of AALA e.g., indoor climbing walls, canoeing on inland placid waters not exceeding 50m from the nearest bank, overseas expeditions other adventure activities, e.g., gyll scrambling must only be led by providers/staff holding an NGB qualification, or approved by a qualified technical advisor. If staff employed by the academy have relevant experience and qualification, this in date qualification **must** be uploaded to Evolve.
- If Category C activities being undertaken by academy staff, ensure that these staff have the required in date NGB qualifications and that these have been checked by Principal and the Trust.
- Take a lead on risk management. It is good practice to involve all the Group/visit Leadership team to ensure wide understanding and to give clarity about what they need **to do**. It is also good practice to involve young people wherever appropriate. (Nimble risk assessment training to be completed)
- Define the roles and responsibilities of other leaders, first aiders and helpers (and participants) to ensure effective supervision throughout the visit.
- To appoint an assistant group/ visit leader and equip them with the same knowledge of process and planning that you as group/ visit leader has.
- To prepare and assess 'Plan B's' if a planned activity needs to be changed.
- Ensure robust emergency procedures are in place.

- You must refer to further guidance from the OEAP national guidance specifically 3.4k Group/ visit Leader and 3.3e Group/visit Leader checklist
https://oeapng.info/search_gcse/?q=Visit%20Leader%20checklist

3.4 Assistant Group/ visit leader

- Be sufficiently competent and confident that if the Visit or Activity Leader is incapacitated you can take over and ensure the safety of the group.
- Know and understand establishment and employer policies/procedures, in so far as they affect the responsibilities you have been assigned.
- Be meaningfully involved in the planning and preparation for the activity/visit, including contributing to the organisation of risk management.
- Ensure that you understand the role and responsibilities that you have been assigned and how you work alongside other staff and the Activity/Group Leader.
- Ensure you are aware of plan B activities, and emergency procedures.
- Be clear about any arrangements to hand-over and hand-back responsibility for supervision between members of staff and to/from any third-party
- You refer to further guidance from the OEAP National guidance specifically 3.4l assistant leader.

For further guidance please see: <https://oeapng.info/visit-leader/>

3.2 Accompanying Staff and Volunteers

- The Group/visit Leader must fully brief accompanying staff and volunteers about their role, task(s) allocated to them, risk assessments and the planning of the trip.

For further guidance, please see https://oeapng.info/search_gcse/?q=establishment%20roles

3.3 Central Health & Safety Team

- The Head of Health and Safety and H&S officers are the designated CLF Education Visit Co-ordinators.
- When a Category C type trip has been authorised by a principal, it will be submitted (via Evolve) to the Central Health and Safety Team for full approval. The H&S team will check and authorise all Category C type trips on behalf of CLF. **Please be aware that if there is unreasonably late notification to the H&S team there is no guarantee that the trip will be approved on behalf of CLF and therefore be unable to go ahead.**
- The Health and Safety team will also randomly spot check planning and approval for Cat A and B trips.
- The Central Health and Safety Team will also be the point of contact for each Academy EVC for any queries involving the safe planning of school trips.

3.4 Students

- The Group/ Visit Leader will fully brief all students attending the trip. Students have a responsibility to follow the academy code of conduct for trips (usually an extension of your behaviour policy) and any additional information provided to them by staff.

4 Guidance

Under the Health and Safety at Work Act 1974 and Management of Health and Safety at Work Regulations 1999, Principals and Managers of educational establishments must ensure the health, safety, and welfare of all those undertaking and participating in any outdoor and adventurous activities or off-site school visits.

For the effective management of all educational visits and out of school activities, each academy must follow this guidance and set procedures, and applicable guidance of the OEAP (Which CLF have adopted).

Identify persons and their responsibilities, ensure staff attending/leading trips and or activities are properly qualified and experienced.

The management of all academy trips should be undertaken on the Evolve system. Using Evolve will ensure that all trips are planned and authorised in accordance with the academy policy and CLF guidance.

5 Trip Categories (Types of visits and approval)

School Trips (not sporting fixtures) are categorised into 3 levels: category A, B and C.

Category A - Activities and ventures including visits to English Heritage and National Trust properties, local parks, churches, the theatre, nature trails and fieldwork generally. All these activities are normally low-risk and take place in an environment that usually presents no greater risks than those normally present in everyday life.

Approval for:

These **do not need** notifying to the CLF, but the Academy Educational Visits Coordinator (EVC) and Principal must review, submit and authorise these trips.

Category B - Activities and ventures which incorporate some extra risk to the participants. To control and minimise risk, activities must be well planned, and National Outdoor Education Guidance followed (such as the leader requiring additional skills and/or experience; for example, cycling, beach and coastal walking, orienteering in local parks/woodlands, horse riding/pony trekking in non-remote areas, field study work in non-remote upland or coastal areas.)

Approval for:

These do not need notifying to the CLF, but the Academy Educational Visits Coordinator (EVC) and Principal must review submit and authorise these trips.

The trust will spot-check 1 in 10 of this type of trip, and may feedback, ask for clarity etc.

Category C – All off-site visits including residential visits, trips overseas, excursions, outdoor and adventurous activities which incorporate high risk activities or take place in potentially hazardous environments. They comprise of activities that require specially trained, experienced, and qualified staff to lead. Many of these activities fall within the four generic areas of the Adventure Activities Licensing Authority (AALA), these groupings are climbing, caving, trekking, and water-based activities. Most adventure

activities fit in this category, including fieldwork where it takes place in a remote or potentially hazardous environment. In such circumstances specific skills, experience and safeguards are required in order to contain risk at an acceptable level.

However, some do not fall strictly under AALA but should still be recorded as Adventurous activities so that they can be checked by the Trust.

Examples of these are:

Climbing, plus abseiling the use of artificial structures, open water swimming, canoeing on inland waters, windsurfing on inland waters, rafting. Remote or wild country camping. Also, water/ rock-based activities e.g., Gyll scrambling (gorge walking), plunge pooling etc

All of the above must be adequately risk assessed before they are authorised by Central Health and Safety team, Principal or Academy EVC. Any unsafe practise, hazards or unacceptable risks identified during process must be reduced to an acceptable level before the activity can proceed. The above can only be led by licenced providers or by staff with relevant qualification and adhering to national governing body guidance.

N.B Please note a trip can have many separate activities taking place, these will need separate consideration in the risk assessment.

Approval for:

All Category C ventures must be notified to Central Health and Safety team via Evolve, at least **six weeks before** the trip is due to take place. This will mean your timelines for initial approval, planning completion of Evolve etc. and final approval to sign off by the principal will need to be longer. Please see appendix A, attached flow chart for suggested timelines.

This will enable the Central Health and Safety team to properly quality review, and to identify whether the leader of these activities requires additional skills and/or experience. This promotes safety, safe planning and safe practice, and ensures the correct competence. (Please remember when your trip is planned to take place will be at the same time as many other academies across the Trust, hence why we need this amount of notification).

When assessing the most appropriate category in which to place an activity, consideration must be given to the following:

- the type of activity taking place;
- whether it comes under the requirements of AALA.
- the age and abilities of young peoples involved.
- the environment and location of the activity.
- the prevailing weather conditions.
- the experience and qualifications of Group/ visit Leader and adult supervisors

Upon satisfactory completion of Evolve, with all associated risk assessments, Itinerary, and Principal sign off, the Central Health and Safety team will be able to review and authorise the trip. Any trips notified to the Central H&S team **outside of the 6 weeks notification requirement cannot be guaranteed to receive approval and therefore will not be able to go ahead.**

Group/ Visit Leaders should not be expected to start from square one without advice and assistance when/ if asked to organise a school visit. No teacher should become involved in organising a school visit unless they have been provided with training, guidance, and advice and have met with the academy EVC to go through the planned trip. They should have also accompanied several trips, and at least one in the capacity of assistant group/ visit leader. Part of the academy EVC role is to assess the competence of staff leading trips. The EVC must signpost the staff member to the national guidance, run through the process of risk assessing and Evolve (There are Nimble training courses available on Risk Assessment and the use of EVOLVE that must be undertaken). Staff should not undertake the writing of risk assessments unless they have the necessary skills and experience to do so. Group/ visit leader training provides training on risk assessments specific to school trips please follow this link for external training [UVLT – EVOLVE Advice](#).

Newly qualified teachers or support staff should not be expected to lead a school trip until they have accompanied several trips, and at least one in the capacity of assistant group/ visit leader. The principal and academy EVC have provided adequate training, information, instruction and assessed them as competent.

Common law expects people acting ‘in loco parentis’ to take the same care as would a reasonable and careful parent. This duty is continuous during any visit or off-site activity and cannot be delegated. The principle of being ‘in loco parentis’ applies to all young people under the age of 18. Parental consent is therefore required for people under that age.

6 Risk Management

Risk management involves answering two basic questions:

- a) What could go wrong?
- b) What are we going to do about it?

Risk management, in the context of outdoor learning and off-site visits, is a two Stage process:

1. The identification of the potential benefits to be gained from an activity, along with any risks to the health and safety of those involved.
2. The implementation of a plan to best realise these benefits, using professional judgement to ensure that the level of risk does not exceed that which can be justified by the benefits.

Most human activity involves balancing benefits and risks. We cannot have all of the benefits but none of the risks. We can eliminate all of the risk only by stopping the activity - but we then lose all of the benefits.

All risk assessments must form part of the planning process of the trip and uploaded to the Evolve trips management system.

All staff completing risk assessments must have undertaken risk assessment training available on Nimble and/or at part of EVC/Group leader training

Planning risk assessments (generic and visit specific) can be undertaken beforehand. (See template and aide memoire)

Generic/model's assessments e.g., assessments which are likely to apply to the activity with minor tweaks, wherever and whenever the activity takes place.

Visit specific e.g., will differ from place to place and from group to group.

Dynamic risk assessments must be undertaken throughout the duration of the trip taking place. Situations change, weather changes, meaning you continually assess the changing risk and may need to revert to your 'plan B'. This must be looked at via dynamic assessments of the trip. The group and the level of risk must be monitored and assessed throughout and, if circumstances dictate, activities should be curtailed or amended (e.g., change to plan B).

The 'Plan B' should have been prepared and assessed in advance at the planning stage and will ensure that the group/ visit leader does not feel pressurised into going ahead with the original activity because another activity has not been identified.

In practice, it is often these on-going decisions of the group/ visit leader(s) that determine whether the group remains safe and whether the activity is successful. Hence a competent group/ visit leader and visit team is essential.

Risk assessments should be taken on the trip and referenced and stored correctly.

For further guidance, please see <https://oeapng.info/visit-leader/>

7 Information, Training and Instruction

To enable staff to manage off-site trips and activities, CLF recognises that they require information, training and instruction. This is provided to staff in a number of ways:

- The Health & Safety advice within the Health and Safety Manual available on CLiF;
- The Evolve Management System question sets and resources section;
- The National guidance documents provided by OEAP;
- Guidance on how to use Evolve at CLF (on-line Nimble or face to face training and guidance) there is also a training available on Evolve by choosing the red question mark then selecting [evolve visits](#).
- Health & Safety Induction training for all staff – compulsory for all new staff;
- EVC and Group/ Visit Leader training;
- Risk Assessment courses; available on Nimble and also covered specifically for trips in Independent Group/ visit Leader and EVC training.
- Discussions with EVC prior to the trip going ahead.

8 Competency of Staff

The Health and Safety executives' definition of competence is described as:

The combination of training, skills, experience and knowledge that a person has and their ability to apply them to perform a task safely. Other factors, such as attitude and physical ability, can also affect someone's competence.

Academies need to ensure that the competency of staff is acceptable for the off-site trips and activities that they are undertaking. Evolve allows staff to upload their qualifications and experience on to the system and this in turn allows the academy to confirm that the qualification/competency is acceptable for the trip.

If leading or procuring activities, staff need to consider:

- AALA licence (Adventure Activities Licensing regulations)
- LOTC Badge (Learning outside the classroom award)
- National Governing Body (NGB) Awards/Qualifications
- National Vocational Qualification (NVQs)
- Staff individual qualifications
- OCR- Offsite Management Certificates
- Local or in-house validating
- Site specific experience and/ or local knowledge
- Experience confirmed by observation in the field by a qualified person.

Academy EVC and Principal must give consideration as to the Group/ visit Leader, their suitability and competence to lead the trip when outline approval is given.

9 Parental Consent

Where schools need parental consent to outings and activities, Principals should ensure staff seek the consent from the resident parent [i.e., the parent who lives with a child] unless the decision is likely to have a long-term and significant impact on the child, or the non-resident parent has requested to be asked for consent in all such cases.

In cases where the school considers it necessary or has been asked to seek consent from both parents, it is best for the school to assume that parental consent has not been given unless both parents have given consent. This approach ensures that the school has treated the views of each parent equally. It will also help to safeguard the position of the school in terms of exposure to any potential civil liability where, for example, the child is injured while on an educational visit.

10 Individual consent not required.

Schools are **not** required to obtain **individual** consent from parents for students to participate in off-site activities that take place during school hours, and which are a normal part of a child's education (unless they are of nursery age). Such as local studies and local visits to a museum or library, etc. (Education Act 2002 section 29). CLF recognised best practice is to gain a blanket consent at the start of the academic year for this type of visit.

While parents do not have the option to withdraw their child from the school curriculum, it remains good practice to inform parents that a visit or activity is to take place (see 'informing parents' below). Schools should be aware that asking for consent when it is not needed can lead to some parents assuming they can withhold consent and so withdraw their child from a curriculum visit when this is not the case.

- Individual consent **is** needed for all visits organised by establishments other than schools.

- Individual consent **is** needed by schools for visits taking place outside school hours and also for activity taking place both during and outside school hours where it is perceived to involve a higher level of risk, such as a visit involving a long journey or adventure activity.

10.0 Visit-specific consent

There are situations where consent for a specific visit must be required. These include visits abroad, adventure activities and some visits involving third party provision (for example an outdoor education centre) where the provider requires their own consent forms to be signed. In this case information about the visit can be provided to parents and their informed consent given on that basis.

10.1 Informing parents

Schools are required to deliver a broad and balanced curriculum to their students, and it is widely understood that it is not possible to do this effectively without making full use of the local environment and community, within which the school is set. Regular and frequent curriculum visits and activities, off the school site, should therefore be the norm and it would be unreasonable for schools to request consent of each particular excursion.

For these visits, which do not require individual parental consent, it is good practice to inform parents, perhaps when they enrol their child, and annually through blanket consent, policy document or web site, about the way the school uses the local environment and the fact that their child will not always be on the school site but could be learning somewhere in the wider community.

Where consent is required, the key is to provide parents with sufficient information to make an informed decision about the participation of their child. Such information may be given in a variety of ways, as the information needed by parents will depend on the nature and complexity of the visit. For example, regular sports fixtures or cultural visits may involve information being given for the season or for the term ahead with parents being informed of any changes to this as they occur, perhaps by note, phone, email, text etc. For more complex visits specific information letters will be needed and for the most complex or adventurous visits a combination of written information and briefing/information meetings may be most appropriate.

NB – the DfE suggest a blanket consent form for **all trips**- this is **not endorsed by CLF**. What we do advise is that an annual blanket consent form can be drawn up for trips of **lower risk in the local community** in school hours. E.g., local studies, visit to the library, church etc, specific higher risk activities specific consent and medical information is obtained.

11 Inclusion

Activities should be available and accessible to all, irrespective of special educational or medical needs or protected characteristics. There is a duty to make reasonable adjustments. When a visit or activity is being planned, all reasonably practicable measures must be taken to include all young people. Every reasonable effort should be made to find a venue and activities that are both suitable and accessible and that enable the whole group to participate fully and be actively involved.

The principles of inclusion should be promoted and addressed in policy and practice, ensuring:

- An entitlement to participate.
- Accessibility through adaptation or modification, including the provision of auxiliary aids and services.
- Integration through participation with peers.

A complete list of students who require medications, or who have food allergies or who have SEND/Safeguarding concerns should be drawn up, and arrangements put in place to support and manage these needs. Often this will be with support and information provided by the SENCO/DSL. Where required full individual risk assessments should be drawn up and submitted along with all other documentation on Evolve.

Please refer to your Academy Policy – Supporting Students with Medical Needs

It is a requirement once the students participating are known, that the designated safeguarding lead is approached to view the list of students, and if there are any issues that the group/ visit leader should be made aware of or made aware if it is possible that something could unravel on the trip. Contextual risk assessments must also be considered/ discussed with DSL.

For more information, please see the National guidance:

https://oeapng.info/search_gcse/?q=Inclusion

<https://oeapng.info/downloads/download-info/4-4d-medication/>

https://oeapng.info/search_gcse/?q=Staff%20ratios

12 Ratios and supervision

Academies must ensure that the staffing of visits enables leaders to supervise young people effectively. Decisions about the staffing and supervision should consider:

- The nature and duration of the visit and the planned activities.
- The location and environment in which the activity is to take place.
- The nature of the group, including the number of young people and their age, level of development, gender, ability and needs (behavioural, medical, emotional, and educational).
- Staff competence and experience.
- The consequence of a member of staff being indisposed, particularly where they will be the sole leader with a group for any significant time.

Staffing ratios are a risk management issue and should be determined through the process of risk assessment. It is not possible to set down definitive staff/participant ratios for a particular age group or activity. Some older guidance documents do set out ratios, but these should be regarded as **Starting points** for consideration rather than being definitive, as they may be appropriate only where the activity is relatively straightforward, and the group has no special requirements. For example, the DfE publication HASPEV (1998) suggested the following “starting points”:

- School years 1 - 3, 1:6
- School years 4 - 6, 1:10/15
- School years 7 onwards, 1:15/20
- Residential/overseas 1:10

Without special safeguards or control measures, these ratios will **not** be adequate to meet the needs of most residential or more complex visits.

The Early Years Foundation Stage (EYFS) Statutory Framework no longer sets out different requirements for minimum ratios during outings from those required on site. As with other age groups, ratios during outings should be determined by risk assessment, which should be reviewed before each outing. The appropriate ratio on an outing is always likely to be higher than the legal minimum (for children aged three and over in early year's settings either 1:8 or 1:13 and 1:30 in infant school reception classes in maintained schools). It is not unusual for a ratio of 1:1 to be necessary.

In some cases, there may be only one leader on a visit, or on a particular activity during a visit. If this is the case, young people (or any adult helpers) should be competent to manage in the event of the leader being taken ill or injured and should, as a minimum, know what to do to contact the establishment and get support.

Staffing, especially for visits to remote locations or overseas, should take into account how the group will be supervised effectively given the possibility of a leader becoming indisposed or having to leave the group, for example to accompany a sick child to hospital.

There is no absolute requirement for children to be accompanied by staff of the same gender, even on residential, but if this is not to be the case then there should be a sound plan to manage the potential issues involved, including the needs for privacy, safeguarding and pastoral support.

For further advice, please see the National guidance: <https://oeapng.info/downloads/download-info/4-3b-ratios-and-effective-supervision/>

13 Emergency Procedures and Incident Reporting

Group/visit Leaders must:

- Take emergency information with them including contact numbers (stored securely and destroyed once back at the academy)
- Agree contact numbers before the trip takes place.
- Ensure these form part of the risk assessment process.
- Specific thought should be given to contingency arrangements around infectious disease, illness including COVID 19
- Prepare a plan B that is available should circumstances change.
- The information taken will depend on the location of the trip. For example, for an overseas trip, the details of the nearest British Embassy/Consulate should be taken* and all academy mobile phones must have the emergency numbers pre-programmed (i.e., Emergency out of hours delegated person, principal, Health & Safety, reception, nearest hospital to area visited etc.)

*These can be found on the Foreign and Commonwealth Office website – www.fco.gov.uk. The site also offers advice on visiting the country.

Each residential trip should have an emergency contact person from the academy, it must be someone not on the trip. This person should have a working knowledge of the trip and be able to access the trip information at all times. The trip information should all be contained within Evolve.

Should a critical incident occur, the academy Critical Incident Management Plan will be activated.

Information to be taken on the trip can be found in Evolve under the resources section and the OEAP website

Important - If taking hard copies of information that hold personal information, this needs to be protected to adhere to data protection requirements (GDPR). Advice on GDPR can be found within the employment manual on CLiF.

14 Use of CLF Travel Cards

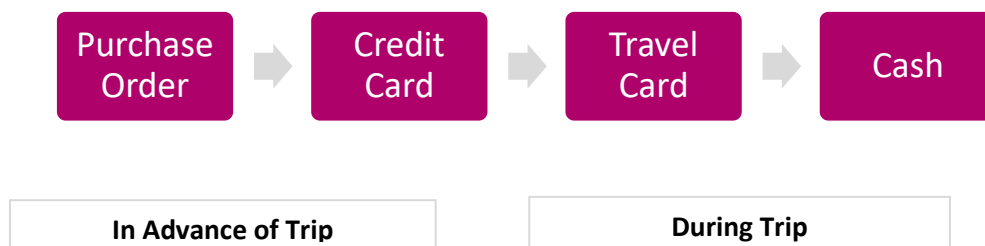
Unfortunately, the world is an unpredictable place, (for example through recent terrorist related activities) meaning this needs to be thought about when planning your trips, especially when travelling abroad or to major cities. Within the adopted National guidance, some comprehensive guidance around this leads to planning for the remote possibility of this occurring.

Academies should continue to meet trip expenditure in advance through preferred purchasing routes ahead of utilising other methods of payment whilst away as denoted in *Figure 1*.

It is particularly important to meet trip expenditure in advance where possible as the travel card is a prepaid card. As a result, CLF does not benefit from comprehensive protection where a dispute for non-delivery of goods or services arises.

As a more secure method of carrying currency, travel cards must be utilised ahead of cash whilst overseas.

Figure 1: Trip Expenditure Hierarchy Trip Expenditure Hierarchy



Further guidance can be found in CLF Financial regulations or from your Finance advisor.

15 Accident/Incident and near miss/First Aid

Should a situation occur, follow the accident procedures as outlined in your academy arrangements, and Health and Safety Policy (for example, a student or staff injure themselves while off-site).

All academy trips should have adequate access to appropriately trained first aiders and this will have been included and assessed within the planning stages and risk assessments conducted as part of the academy trip. The level of first aid is based upon an assessment of the risks. For example, the location of the trip, the activities undertaken, the needs of the group, the numbers of students and staff going, and the remoteness of the trip will come into consideration.

For children in the Early Years Foundation Stage (EYFS), there is a statutory requirement that at least one person who has a current paediatric first aid certificate and sufficient understanding and use of English to summon help in an emergency must accompany children on outings.

Ensure you have access to the online accident reporting system or take a copy of the accident forms with you on the trip to update online upon return.

If a student needs to visit hospital, an adult should accompany and stay with them, and academy/ parents informed.

Examples of First aid requirements:

Example 1: a walk to the local library on a footpath adjacent to a public road with ambulance access. The academy must have first aid provision on site (not necessarily accompanying the group); so, must the library. The Group/visit Leader has some basic knowledge of first aid and is carrying a mobile phone in an area of good reception. A qualified first aider would be a bonus but is not essential.

Example 2: a walk along a rural footpath, with no vehicular access for about 2 miles, to a picnic site. Any significant injury here would involve such a time delay in accessing an ambulance as to make it necessary for there to be someone with appropriate first aid training and expertise as a member of the group, carrying a mobile first aid kit.

Example 3: an outing to the local park by a nursery academy group. Someone with a current paediatric first aid certificate must accompany the group.

However as stated above, the provision of first aid should always be risk assessed.

16 Assessing Providers /Venues

When selecting a provider there are two accreditations that you need to be aware of:

AALA



If you are using a provider to undertake any of the activities that come under the scope of the Adventure Activities licensing Regulations; these came into force in 1995 following the Lyme Bay tragedy. They need to have an in-date licence to provide these activities. Put simply these are caving, climbing, trekking and water sports activities. The licence provides an assurance of safety, it does not provide assurance of educational or activity quality.

LOtC



The Learning outside the classroom badge is a safety and quality standard. It is a national accreditation and award scheme which recognises good quality educational provision for young people throughout the UK. Unlike AALA this is not a legal requirement but an assurance. If you are using a venue that does not have LOTC, so no independent quality check/validation, send them a Provider declaration form OE01. To check if a venue has the Lotc badge visit: <http://lotcqualitybadge.org.uk/>

On the Evolve system, under resources, there is a section called KADDI, this is a list of venues in the UK and is a quick search for venues/ providers in your local area and if they have attained the LOTC badge. There are also useful reviews from other schools regarding the venue and provider.

It is good practice and strongly recommended for a preliminary visit to be carried out where the location is not familiar to the group/ visit leader or member of staff.

Even if the group/ visit leader has led this trip at the same venue for a number of years things can change, questions should be asked at the time of booking the venue: for example, have there been any staff changes or developments to the site or the grounds. If there have, then a preliminary visit is recommended. This knowledge will form part of the risk assessment and pre-planning. It will help the group/ visit leader to concentrate on the needs of the group rather than the unexpected demands of the environment.

If it is not possible to visit the site beforehand, the person giving approval will need to be satisfied that alternative arrangements are sufficient for an assessment to be made. Such alternatives might include obtaining advice from those with experience gained from previous trips, reports of previous trips or the use of experienced and reliable local guides where appropriate.

A reconnaissance visit by the group/ visit leader on arrival at the venue whilst the group remain in their accommodation, would assist - This is a dynamic risk assessment.

17 Volunteers

If your establishment uses volunteers, the academies procedures should address the following:

- The vetting procedures for volunteers, including when an enhanced DBS check is required.
- The minimum induction and training procedures for volunteers.
- How volunteers are assessed as competent to carry out their assigned role.
- Requirements for supervision of volunteers.
- The Academy must follow the advice from HR regarding the use of volunteers.

Voluntary helpers may be used to assist with the organisation and supervision during visits. They need to have Enhanced DBS clearance and their role must be clearly defined. They must have the risk assessments shared with them and be fully briefed on the arrangements for the trip. They must act towards the students as a careful parent/carer would in similar circumstances.

18 Behaviour

All parents and students will have explained to them the expected behaviour for the duration of the trip. It is good practice to get parents and students to sign up to this via a code of conduct/behaviour contract before the trip takes place. Detailed within the code of conduct should be the expected behaviours, what is not acceptable and the sanctions that the academy will impose even though off site.

19 Insurance

CLF have comprehensive annual insurance in place for off-site activities.

The insured persons are:

- Any student enrolled with the Policyholder.
- Any member of the teaching and support staff employed by the Policyholder.
- Any adult who is acting in a supervisory capacity as a volunteer, assistant or helper and is authorised by the Policyholder to undertake a journey.
- Any child other than as described in a) who is authorised by the Policyholder to undertake a journey.

The policy covers:

Any organised trip undertaken by an Insured Person with the authorisation of the Policyholder involving travel outside the designated academy boundaries of the Policyholder.

In respect of trips of less than one day's duration, cover shall be operative from the time of leaving the academy boundaries until arrival back within the academy boundaries.

In respect of trips of more than one day's duration, cover is extended to include travel directly from the Insured Person's home address to the place of official assembly at the commencement of the trip and travel directly from the official place of dispersal to the Insured Person's home address upon completion of the trip.

Trip Exclusions are:

- Staff or volunteers over 70 years of age – most staff in this category are SMSAs and Exams Invigilators. Please check with your HR team if needed.
- Individuals who travel against medical advice.
- CLF will always comply with government advice. If the Government has advised against overseas or UK travel for any known circumstances at the start of the cover or at the time of booking a trip, cover is unlikely.

Excluded activities are:

- Motor cycling.
- Racing of any kind other than on foot.
- Winter sports other than skiing or snowboarding in the United Kingdom on a dry ski slope or within a snow dome.
- Skating or curling.
- Aerial pursuits including but not limited to ballooning, bungee-jumping, gliding, hang-gliding, micro lighting.
- Parachuting, paragliding, or parascending.
- Jet skiing or white-water rafting.
- Mountaineering or rock-climbing using ropes or guides.
- Hiking, trekking, or mountaineering above 3,000 metres.
- Caving using caving equipment.

- Diving using external breathing apparatus.

Included Winter Sports Cover are:

- Skiing, snowboarding, curling, skating, the use of skibobs and toboggans all to a standard appropriate to the Insured person's experience and training as judged by a qualified instructor.
- Transits by lifts and recognised paths to and from skiing, boarding or skibob pistes all under the supervision of qualified instructors or teachers.
- Unaccompanied use of nursery ski slopes or skating with the consent of a qualified instructor.

If the activity is outside the above, then separate cover is required.

For further information contact Heidi Clement, Head of Contracts and Estates Heidi.clement@clf.uk

20 European Health Insurance Card (EHIC now UKGHIC)

The UKGHIC allows access to state provided healthcare in all of Europe and a number of agreed countries. It is advised that where possible students/their parents should obtain the card. Please note that this is not an alternative to the academy's Travel Insurance Policy.

For further information, please see the NHS website.

21 Academy Minibus

Academy Minibuses should not be driven unless.

Drivers of the minibus are MIDAS trained and certificated. The academy must have procedures in place to check individual drivers' licence (annually). Pre use checklists should be completed before the mini-bus leaves site and retained on the vehicle. Robust maintenance schedules are in place and records kept.

Please refer to the minibus policy available in the resources section of Evolve.

For further information, please see the Academy Minibus Policy and or contact the Department for Transport – T: 0300 330 3000

22 Hiring of Coaches, Minibus, Taxis

If hiring a coach and driver, or a minibus, you should only select from the approved list that appears as a drop down when you fill in the Evolve form. If the company you have chosen does not appear on the list, you must contact the Health and Safety team. Those companies that appear on the list have been checked (annually) to see that they have a current operator licence. Please refer to [OEAP guidance hiring of coaches](#) in resources section of Evolve.

If using a Taxi

Again, there are taxis within the drop-down list, that are licensed by the Local Authority, and are used for home to academy transport. This is not an exhaustive list. You should check that the taxi that arrives is displaying a Local authority licensed sign. You should then further check that the driver is wearing an identity badge/ lanyard and that there is a photo id plate in the vehicle, all three should match.

Appendices

Appendix A Flowchart and table for arranging academy trips and time lined checklist of flowchart.

Appendix B Aide memoire and RA template

Appendix C EVC Trip checklist

Appendix D Group Leader visit checklist

Appendix E Group Leader emergency Action Card

Appendix F Principals check list for approval

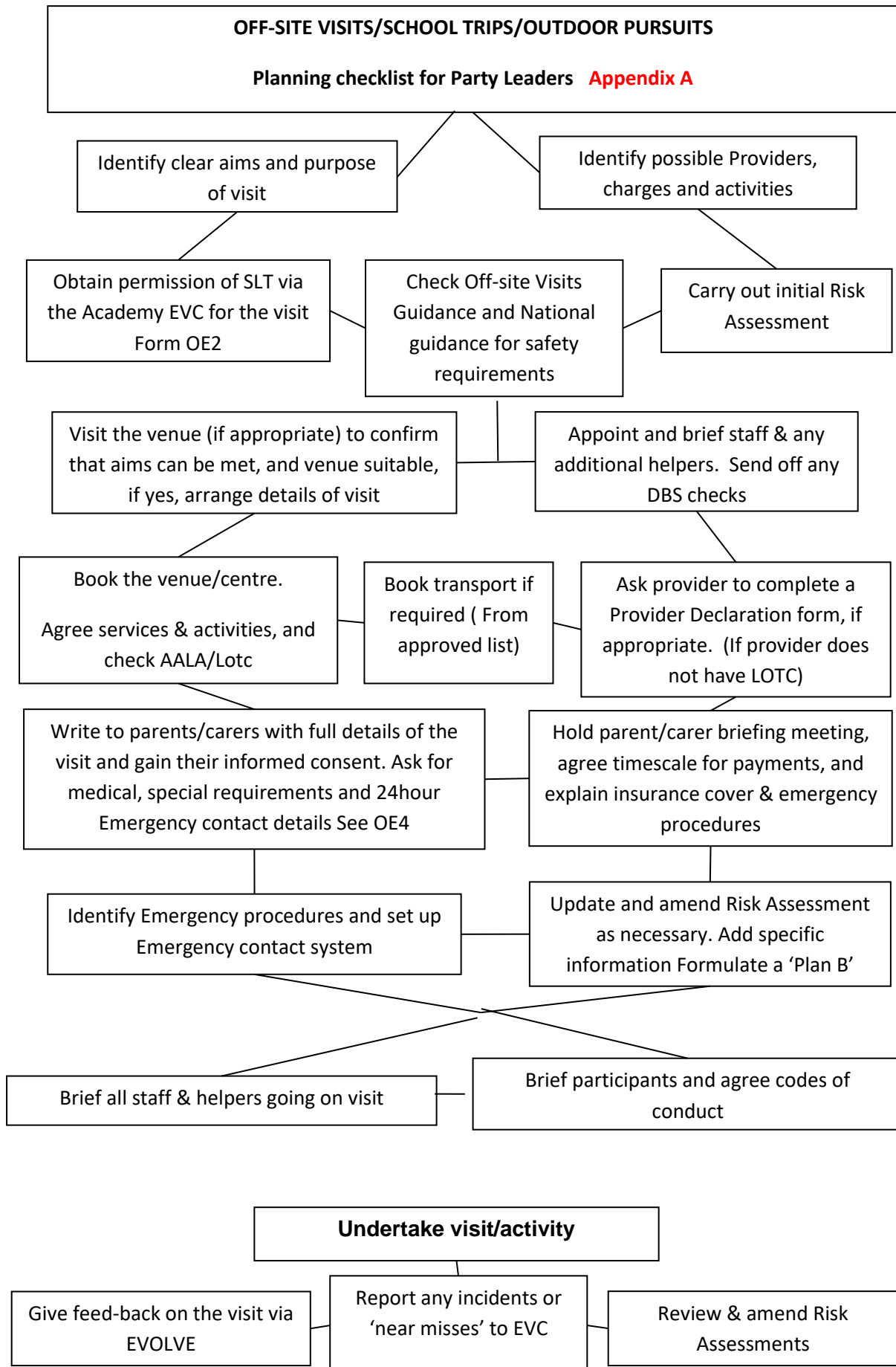
Model Forms

OE1 Providers Declaration form

OE2 Model Visit proposal form to be approved by SLT

OE3 Model Parental consent form

OE4 Accompanying Adult Information Form




OFF-SITE VISITS/SCHOOL TRIPS/OUTDOOR PURSUITS Appendix A CONT			
Planning checklist for Group/visit Leaders			
Trip			Dates
GL			
DGL			
Timescale	Task		Date Completed
PRE-PLANNING	Identify clear aims and purpose of visit with SLT lead (critical friend)		
	Identify possible providers, charges and activities, national governing awards. AALA/Lotc accreditations		
	Read off-site visits policy/guidelines, safety requirements and national OEAP guidance(held in resources area on EVOLVE)		
	Carry out initial risk assessment (see model template and aide memoire)		
	Complete trip request form and pass to EVC		
	Initial approval obtained from SLT at weekly meeting within the following timeframes: - 4/6 weeks before the trip for category A or B (This is advisory based on academy management routines- you need enough time to be able to plan and approve) - 12 weeks before the trip for Category C- (This is to allow the trip to be planned submitted and approved, by academy, before it is sent to CLF for final approval providing 6 weeks' notice to CLF)		
	Notification received that initial approval obtained via email		
PLANNING	UPDATE TRIPS CHECK	Start Evolve process (see timescales below)	
		Visit the venue (if appropriate) to confirm that aims can be met, and the venue is suitable, if yes, arrange details of visit. If not, trip re-evaluation or cancelled.	
		Appoint and brief staff and any additional helpers, ensure all staff are DBS checked check competence and experience	
		Book the venue/centre, agree services and activities (ensure written confirmation obtained)	
		Ask provider to complete a 'providers declaration form (OE1) standards' questionnaire (if appropriate)	
		Book transport if required (see approved list)	
		Provide a list of students attending to Finance.	

4/8 WEEKS	Identify students with SEND/Care Plans and existing individual student risk assessment then book meeting with SENCO to discuss needs and complete assessment Also book a meeting with the DSL, are any of the students you are taking on their radar, and anything that could possibly unravel on the trip.	
	Write to parents/carers with full details of the visit and gain their informed consent. Ask for medical, special requirements and 24-hour emergency contact details (POSS SIMS REPORT)	
	Hold parent/carer briefing meeting, agree timescale for payments, explain insurance cover and emergency procedures	
	Update and amend risk assessments on Evolve as necessary, formulate a 'Plan B'	
	Plan emergency procedures (see national guidance)	
	Press release to Dean Blake??	
	Identify emergency procedures and set up emergency contact system	
2 WEEKS	Ensure EVOLVE is fully completed and sent to EVC for approval, by EVC, Principal and Trust	
	Meet with EVC to go through details of the trip (EVC and Group Leader checklist from National Guidance)	
1 WEEK	Brief all staff and helpers going on visit (complete staff briefing minutes and ensure all members of staff have signed to confirm that they understand their responsibilities). Check with DSL and SENCO no emerging concerns with students	
	Collect trip phone and ID cards for students (with emergency contact details on)	
1 DAY	Ensure all equipment to be used is available	
	Obtain accident reporting forms and first aid kit	

ON DAY	Meet EVC to run through final details of the trip - any concerns to be raised with xxx	
	Brief participants and agree codes of conduct	
	Check adequate student medical supplies are taken, follow how they will be stored and administered	
	Ensure medical paperwork is completed (what has been given, by whom, when and what dose)	
	Undertake visit/activity	
	Any notable incidents must be reported to SLT lead	
EVALUATE	Parental consent forms must be handed back to Admin Team to conform to GDPR and adhere to guidelines for holding student information	
	Report any incidents or 'near misses' to EVC - immediately upon return	
	Review and amend risk assessments	
	Upload completed 'planning checklist' to EVOLVE	
	Meet SLT member responsible for trip for evaluation within one week of return (Category C to feedback to SLT on the Monday following return)	
	Final press release with photos sent to Dean Blake	
TO BE COMPLETED AND BROUGHT TO TWO WEEK AND ONE DAY MEETING WITH EVC		
<u>EVOLVE completion timetable:</u>		
A - 4 weeks before trip		
B - 4 weeks before trip		
C - 8 weeks before trip		


Appendix B – Model RA and Aide Memoire



Cabot Learning Federation
Equity Through Education

RISK ASSESSMENT

Title:	Day trip/ Residential trip/ DofE		
Academy:		Department:	Number of staff/students:
Name of Assessor:		Position:	Date of Assessment:
H&S Advisor:			
Annual Review: <i>To take place sooner should significant change or incident occur</i>			
<u>STAGED- Areas to consider when undertaking a risk assessment</u>			
Staffing – Sufficient staff and competencies Transport – How are you travelling? Activity – Is this provider led or do they have a LOtC Quality badge? Are school staff appropriately trained? Group – Behaviour, Medical, educational, emotional Environment – Is this urban or rural, summer/ winter. Distance – How far away from school are you, how accessible are you for emergency services.			
These are just considerations but not an exhaustive list, as a team you should discuss and prepare. <i>Ongoing Dynamic assessments are always required to manage changes that can't be foreseen</i>			
Possible Hazards	Who is at risk?	What is being done to alleviate risk?	What more can you do-Further Action Required



Cabot Learning Federation
Equity Through Education

Trips Aide Memoire

These are all areas that will require further considerations to assist in reducing risk.

Here are some useful links from OEAP and throughout this document there are links to National Guidance.

- [4.3c Risk Management - an overview](#)
- [4.3f Risk Management - Practical advice](#)
- [4.3g Risk management - What to record and how](#)
- [6a FAQ's - Asking for a providers Risk Assessments](#)
- [8.1i Model code of Conduct](#)

Appendix C - EVC Trip checklist

General

For each of the following bullet points, further clarification on good practice can be found elsewhere in the National guidance

- I have attended OEAP approved EVC training and remain currently competent, and I have access to advice such as from an accredited outdoor education adviser.
- I have an understanding of how visits/outdoor learning can support a wide range of outcomes for children and young people.
- My establishment has a policy for visits/outdoor learning, which I understand, and it adopts OEAP National Guidance.
- Visits/Outdoor Learning are an integral part of the work of the establishment and are evaluated and good practice shared.
- I support/oversee planning so that activity is well-managed, engaging, relevant, enjoyable and memorable.
- Procedure and responsibility for engaging leaders and determining their competence is clear and I support those involved in approval decisions.
- Leader induction and training needs are identified, and I support leader development, sampling activity to identify any further training needs.
- Visits/outdoor Learning are regularly considered at Senior Leadership level and by Governors/Trustees and I provide information about the range of activity and its contribution to school/establishment effectiveness.
- There is an establishment emergency response procedure, appropriate to the nature of activity undertaken, which is periodically tested.
- Accidents and incidents are reported and investigated, learning is shared and RIDDOR requirements are met.
- Notification and approval procedures are followed correctly and within agreed timescales.
- Initial consent for trip proposal given
- Visit/Activity Specific
- Preliminary visits have taken place if required.
- Any third-party providers have been appropriately selected.
- Parental consent, where required, is in place.
- Parents have been provided with appropriate information.

- There are clear learning/development aims, which contribute to the wider aims/ethos of the establishment. An evaluation process is in place.
- The group leader/ assistant group leader are sufficiently confident and competent for this activity with this group.
- The group leader is responsible for, and has ownership of, the visit plan including risk-benefit management.
- Where appropriate, all leaders and participants have been involved in the planning process.
- There are sufficient staff to ensure effective supervision and to deal with incidents and emergencies.
- Everyone is aware of their roles and responsibilities.
- Medical, first aid, inclusion and safeguarding issues have all been addressed.
- Any travel, transport, and residential arrangements are appropriate.
- There is a 'Plan B'/alternative options if needed.
- Where necessary, there is a designated 24/7 emergency contact with access to all information and documentation relating to the activity.
- The Group Leader has sufficient funds and an effective means of communication in case of an emergency.
- Suitable insurance is in place.

Finally

- All relevant requirements of the employer and establishment policy/procedure have been met.
- The Group Leadership Team and Activities are appropriate for this Group – it's age, competence and the needs of the young people – in this setting/Environment.
- This Visit is well prepared and ready for approval.

Appendix D - Group Leader visit checklist

This list is designed as a final check on visit planning. The relevance of the bullet points and the complexity of the responses are dependent on the nature of the particular visit. For each of the points, further information about good practice can be found elsewhere in the national guidance.

- The benefits and risks of all aspects of the visit have been considered and the visit plan.
- Has an appropriate balance and an acceptable level of residual risk.
- The visit plan has involved leaders and helpers before the visit, and they are clear about what they are expected to do in order to manage the risks.

Content and Aims

- There are clear and well-considered aims that are particular to the learning and development of the group as a whole and individuals within it, which contribute to the wider curriculum or ethos of the establishment.
- Evaluation and visit review arrangements are in place.
- The process has led to a visit plan addressing the following variables:

Staffing

- I am clearly identified as the Group Leader and approved by the academy.
- All members of the Group Leadership Team are sufficiently confident and competent to fulfil their designated role.
- There are sufficient leaders to ensure effective supervision and deal with incidents and emergencies.
- All members of the Group Leadership Team have received all relevant information on both the visit and the group.
- If accompanying leaders are taking a family member on the visit, there are arrangements to ensure that this will not compromise group management.
- I have kept my Academy EVC informed during the planning process.

Activities

- Activities are appropriate to the aims of the visit and the nature of the participants.
- Appropriately competent activity leaders are in the Group Leadership Team, or a suitable Provider has been contracted to lead activities.
- There is a sufficient amount of suitable equipment for activities.

Group

- Up to date contact details, medical information, dietary requirements and information about special needs are available and shared appropriately with the Group Leadership Team and any relevant provider staff.
- Information has been provided to parents and young people to enable informed.
- Consent (where consent is required).
- Participants have been provided with information about what to do and what is expected of them, and, where appropriate, have been involved in the planning and risk benefit assessment process.
- Safeguarding issues are addressed.
- Inclusion issues are addressed.

Environment

- Environmental factors (weather, daylight hours, temperature, water levels etc.) have been considered.
- Accessibility issues are addressed.
- Safety and security have been checked and considered.
- I have undertaken a preliminary visit if appropriate.
- In the absence of a preliminary visit. I have sufficient information from other sources.
- There is access to first aid at an appropriate level.
- Where remote supervision will be used, the environment is suitable.
- Accommodation, where used, is safe, suitable and appropriate.
- Travel or transport arrangements are appropriate.
- There is a Plan B/alternative options in place, where necessary.
- There is an emergency plan in place and leaders, helpers, participants, providers, and emergency contacts have been given relevant information about it.
- Suitable insurance is in place (and required documents if visiting overseas).

Finally

- The visit meets all relevant requirements of my employer and establishment policy/procedure.
- My decision is that this visit is appropriately prepared and should take place.

Appendix E - Group Leader Emergency Action Card

First Contact Emergency Action Card

If an Academy adopts this “card”, it should make it available to any staff likely to take incoming phone calls from a Group Leader or member of the visit team.

It is recommended that the card is placed visibly in any office where such calls may be received. It may be laminated, or if used to record information directly, placed in a clear pocket with several back-up paper copies.

On receiving a call

In the event of receiving an emergency call from a group on a trip, remember they will be very stressed. You need to remain calm to be able to take down some key information without missing anything. Carry out the actions below, as appropriate.

Take down the following information:

Who is calling?
If you have more than one Establishment, which one are they from?
What is their role in the group (Group Leader, Assistant Leader, Helper, and Participant)?
What number can they be called back on should you be disconnected?
What has happened? What is the nature of the emergency?
What is the number and status of any casualties?

What is their current location?
What is the total number of people in the party?
Are they staying where they are or moving? If they are moving where to?
What help do they require?
What time did the accident happen?
What time is it now? If the group is outside the UK, what is the time difference?

-
2. Reassure them and tell them they will be called back once you have contacted a senior manager (within 30 minutes).
3. Contact staff in the following priority order and give them the information you have noted.

The table below should be completed with names and numbers of those who should be informed, in order of priority.

Name	Telephone(s)	Mobile(s)

If you receive a call from the media or a Parent, refer them to a senior manager.

Appendix F – Principal checklist

- I have appointed an Educational Visits Coordinator (EVC) who is an experienced visit leader.
- Roles relevant to visits/outdoor learning are clear
- The academy has a policy for visits/outdoor learning, and it adopts OEAP National Guidance
- Any training required by the policy has been undertaken.
- The academy has standard operating procedures for straightforward and routine visits/activities.
- Staff induction and training needs are identified and addressed.
- Procedures are followed correctly, and visits are formally notified and approved as required by the policy.
- Procedure and responsibility for engaging leaders and determining their competence is clear. Supported by my EVC, I make approval decisions.
- All adults including volunteers are vetted, and those engaging in regulated activity have enhanced Disclosure and Barring Service (DBS) checks with barred list check.
- Inexperienced visit leaders receive training/mentoring alongside experienced colleagues.
- Information about the range of visits/outdoor learning and their contribution to academy effectiveness is regularly considered by senior leadership and academy council.
- External providers are appropriately selected and used.
- Systems are in place for informing parents, and for obtaining their consent when required.
- Systems are in place for obtaining and securely handling up-to-date participant data including contact details, medical information, dietary requirements and information about special needs.
- Medical, dietary, first aid, inclusion and accessibility issues are all addressed.
- Safeguarding issues are addressed
- Any travel, transport, and residential arrangements are appropriate
- Plans for visits/outdoor learning include alternative options (a 'Plan B') for potential changes of circumstances
- There is an emergency plan in place, which is periodically tested.
- There are arrangements for emergency contact including for activity beyond normal establishment hours and 24/7 for residential, with access to all relevant information and documentation.
- Accidents and incidents are reported and investigated, learning is shared and RIDDOR requirements are met.

- Visit Leaders have access to sufficient funds and an effective means of communication in case of emergency.
- The academy has suitable insurance in place to cover the normal range of visits and activities, and specific additional insurance is arranged when necessary.
- Any charges to participants/parents comply with the academies charging policy.
- Contracts with providers and participants/parents are satisfactory.
- Monitoring is in place to ensure that all requirements of my employer and establishment are met, and that the quality of visits/outdoor learning meets expectations
- Visits/outdoor learning are reviewed and evaluated, and good practice is shared.

OE1 - Provider Declaration Form

Group Leaders please note you should NOT send this form to a provider that holds a relevant **Learning outside the Classroom Quality Badge**, unless your employer requires confirmation of indemnity limits (Section A). Details of the badge and a list of holders can be found at www.lotcqualitybadge.org.uk

Group Leaders requiring advice on the interpretation of information given by Providers on this form should contact their Academy EVC.

PART 1: To be completed and signed by the Group Leader

Name & address of Establishment:	
Email:	
Contact Number:	
Type of Visit/Activity:	
Name of:	
Name of Provider:	
Date(s) of visit:	

PART 2: To be completed by the Provider

Please give careful consideration to the following statements and respond with YES, NO or N/A, or give the specific information required. If you hold a valid Learning Outside the Classroom (LOtC) Quality Badge but the Group Leader requires confirmation of your indemnity limits, only complete Section A, 1.1 and 1.2 and the Confirmation.

SECTION A

To be completed for all types of visits

Insurance		
	Do you hold public liability insurance, which will be current during the proposed visit, and which covers all directly provided and sub-contracted activity?	
	If yes, what is its indemnity limit?	£ M

SECTION B

To be completed for all types of visits

Health, Safety and Emergency Policies		
	Do you comply with relevant health and safety regulations, including the Health and Safety at Work etc. Act 1974 and associated Regulations, and have a written health and safety policy and recorded risk assessments, which are available for inspection?	
	Do you have accident & emergency procedures in place, with records available for inspection?	
Vehicles		
	Are all vehicles to be used roadworthy, and do they meet the requirements of regulations in the country in which they will be used and EU regulations on passenger seats and seat restraints?	
Staffing		
	Do you have a robust recruitment and engagement process to ensure that staff are suitable to work with young people, including enhanced DBS check and barred list check for any staff engaged in regulated activity?	
	Are there regular opportunities for liaison between your staff and establishment staff?	
	Is there sufficient flexibility to make radical changes to the programme if necessary, and will the reasons for any such changes be made known to establishment staff?	
Accommodation		
	Does UK accommodation comply with current fire regulation requirements (Regulatory Reform, (Fire Safety) Order 2005)?	
	Have you inspected all overseas accommodation to be used to confirm that it meets legal requirements of the country concerned and that it has fire safety and security arrangements equivalent to those required in the UK, and are records of these inspections available?	
	Are there security arrangements in place to prevent unauthorised persons entering the accommodation?	
	Are separate male and female sleeping accommodation and washing facilities provided?	
	Is staff accommodation sufficiently close to young people's accommodation for adequate supervision?	
Sub-contracting		
	Will you sub-contract any services (e.g., activity instruction, transport, accommodation)?	
	Where any element of provision is subcontracted, do you ensure that each sub-contractor meets the relevant specifications outlined in the other sections of this form, and are records of checks of sub-contractors available for inspection?	

SECTION C

To be completed if the visit includes activities or field studies

Adventure Activities Licensing Authority (AALA) Licence		
to be completed if any activities are within the scope of the licensing regulations		
	AALA Reference number	
	Does the Licence held cover all planned activities, which are in the scope of AALA licensing?	
Activity Management		
To be completed about all activities		
	Do you have a policy for staff recruitment, training and assessment, which ensures that all staff with a responsibility for participants are competent to undertake their duties?	
	Do you maintain a written code of practice for activities, which is consistent with relevant National Governing Body guidelines and, if abroad, the relevant regulations of the country concerned?	
	Do you confirm staff competence by appropriate National Governing Body qualifications for the activities to be undertaken, or have staff had their competence confirmed by an appropriately qualified and experienced technical adviser?	
	Where there is no National Governing Body for an activity, are operating procedures, staff training & assessment requirements explained in a code of practice?	
	Will participants at all times have access to a person with a current first aid qualification, and are staff practised & competent in accident & emergency procedures?	
	Is there a clear definition of responsibilities between your staff and visiting staff about supervision and welfare of participants?	
	Is all equipment used in activities suited to the task, adequately maintained in accordance with statutory requirements and current good practice, with records kept of maintenance checks as necessary?	

SECTION D

To be completed by Tour Operators

Tour Operators	
	If you are a Tour Operator, do you comply with the Package Holidays and Package Tours Regulations 1992 and The Foreign Package Holidays (Tour Operators and Travel Agents) Order 2001, including bonding to safeguard customers' monies? Please provide ATOL, ABTA or other bonding body names and numbers below.
Details of any bonding (ATOL, ABTA etc.)	

SECTION E – EXPEDITIONS

To be completed for overseas expeditions

Expeditions	
	Do you agree to provide sufficient written information and assurances specific to the expedition, as required by the establishment and its employing body?

SECTION F – ACCREDITATION

Details of any accreditations held by the Provider

CONFIRMATION

I confirm that the details given above are correct, and that our organisation will give prior notification of any significant changes that might adversely affect the safety and wellbeing of user groups.

Signed: _____

Date: _____

Name: _____

Position in organisation: _____

Name of Provider: _____

Address of Provider: _____

Tel: _____ Email: _____

Website: _____

Form OE2 Initial Visit proposal form to be approved by SLT

This form needs to be completed and forwarded for **All** trips to EVC for SLT authorisation; at least **Twelve weeks** prior for **Category C** visits, residential, overseas and adventurous activities and **Six weeks** prior to category **A&B** visits. If the trip is granted permission to run then EVOLVE will need to be completed and submitted within the required timelines. See the planning checklist and policy for further guidance.

1. Name of Visit:

Date: From To (inclusive)

2. Purpose and nature of visit: e.g., to improve languages: annual camp, outdoor pursuits. Please provide details:

3. Name of: Group Leader Assistant Group Leader

4. SLT member responsible (SLT Line manager for Team area should know about this trip before submission):

5. Number of students in each year:

7 8 9 10 11

6. Number of: Girls Boys Total:

6a. Detail all other equalities information:

Disabled students, religious and cultural needs, students with risk assessments

7. Will students miss any exams, or essential course work, if yes, what?

8. Staffing on visit

Number Names

Additional helpers Names

9. Please detail all cover requirements for this trip. i.e. How many learning sessions each member of staff will need to be covered.

Name of MOS								
Date								
Time	LF	1	2	3	4	5	6	After School

Name of MOS								
Date								
Time	LF	1	2	3	4	5	6	After School

Please tick lessons needing to be covered

10. Address of Venue/Centre/Activity Site and Post Code (essential when Emergency Services are needed)

11. Are they AALA/LOTC licensed? If applicable, has the Provider been contacted to ensure instructor qualifications and operating licences are in date.

If venue provider does not have AALA/Lotc, have they filled in a provider declaration form (see policy and OE1) Yes/No

12. When will the pre-trip visit take place and who will lead this, what other staff are supporting?

13. What is your initial assessment of risks? (Full risk assessments will need to be carried out on EVOLVE if the trip is given the go ahead)

14. Finances

What are the total costs for the trip (excluding cover costs and excluding VAT)?

Please include items such as transport details, entrance fees, residential fees etc.

Insurance is automatic through CLF unless taken through provider.

Please ensure that VAT isn't charged to students in the cost calculations, as an Academy we claim our VAT back.

Expenditure	Income
Any costs applicable e.g., hoodies PLEASE DO NOT INCLUDE VAT	Include projected income from students and any other source. Has a contingency been built in for non-contributory students?
Transport £ _____ £ _____
Entrance Fees £ _____ £ _____
Food £ _____ £ _____
Provider £ _____ £ _____
..... £ _____ £ _____

Free places: Please name teachers who are not paying because they are taking part in the visit. Is anyone else taking part without charge or making a part payment? (Please specify)

Academy account into which money will be paid and from which expenses will be drawn (Finance to complete):

15. Is the trip covered under CLF insurance or separate needed? Yes/No

16. What are the qualified First Aider arrangements?

Member of staff name:

SLT Approved/Declined

Date

OE3 - Parental Consent Form

Pg. 1 of 2

For Off-Site Activities and Residential Trips (Category B and C)

Dear Parent / Guardian,

Please complete and return the form below which relates to the forthcoming journey or activity for which you have already received details. The form gives your consent for your child to take part in this activity.

Name of Academy:		
Name of School Trip/Centre/Activity:		
Date:	From:	To:
Name of Student:	Date of Birth:	
<p>SPECIAL DETAILS</p> <p>Any relevant information concerning your child's health requiring special attention, but which does not prevent him or her taking part must be noted below. For example, does your child:</p> <p>Have any allergies?</p> <p>Take medication and if so, what is the dosage required?</p> <p>Experience travel sickness?</p> <p>Have diabetes, asthma or epilepsy?</p>		
Has your child had any relevant recent illness?		
Does your child have any specific dietary or medical requirements?		
Do you have any additional comments?		
Swimming ability (for water-based activities):		
Is your child able to swim 50 metres?	Yes	No
Is your child water confident with regard to the proposed activity?	Yes	No

I would like my son / daughter to take part in the above-mentioned visit or activity and having read the information provided agree to him / her taking part in the activities described.

I consent to any emergency medical treatment required by my child during the course of the visit.

I confirm that my child is in good health, and I consider him / her fit to participate.

<p>SIGNATURE OF PARENT / GUARDIAN:</p> <p>(Ensure Legal guardian or where requested, that both parents give consent, that both parents have signed)</p> <p>DATE:</p> <p>NAME OF PARENT / GUARDIAN:</p> <p>ADDRESS:</p> <p>.....</p> <p>.....</p> <p>Contact Telephone Number:</p>	
Name and address of Family doctor	
Approximate date of last tetanus injection	
If you child is travelling abroad, do they have the European Health Insurance Card (EHIC)?	
Does your child have a valid passport?	

OE4 – Educational Visits Adult Information

ADULT INFORMATION FORM FOR RESIDENTIAL VENTURES

Personal details:			
Name			
Address			
Details of venture:			
Location:			
Dates:	From:		To:
Activities:			
Personal emergency contact:			
Contact 1		Contact 2	
Name		Name	
Address		Address	
Contact No		Contact No	
Relationship		Relationship	
Medical Information			
Do you have a medical condition requiring on-going medication/ treatment?		Yes	No
If yes, please state:			
Are you allergic to any medication, food or other substance?		Yes	No
If yes, please state emergency treatment:			
Do you have any medical or other condition, which would place you at additional risk from the proposed venture activities?		Yes	No
If yes, please give details:			
Do you have any objection to this information being shared with the other adults on the venture?		Yes	No
If yes, please consult with the Activities Leader or the Educational Visits Co-ordinator.			
Signed:		Date:	
Signed: Group/ Visit Leader		Date:	