

The Mercian Trust

Educational Visits Policy

Policy Owner	The Mercian Trust
Date Ratified by Trust Board	June 2024
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The individual responsible for maintaining this policy is:
Trust Executive Director of Education

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This policy applies to Mercian schools in Walsall.

Mercian schools in Sandwell remain under the Sandwell LA provision and must follow Sandwell policy and procedures.

PART A. TRUST POLICY

A.1 INTRODUCTION AND INTENT

A.1.1 Introduction and context

The Mercian Trust is a group of schools working together under a common banner and an overarching structure of governance but retaining their autonomy as custodians of their unique heritage, distinct identity and successful operation.

As a trust we need to support and safeguard our pupils whilst enabling them to live life to the full. The trust, individual academies, school staff and course providers all have a duty of care to students, any accompanying adults, each other and themselves to ensure that they are kept safe and well and that in the event of any incident they can respond appropriately to minimise risk.

This document sets out the Trust's policy in relation to how Educational Visits and Outdoor Learning experiences (including on site adventurous activities) and any associated journeys will be managed. It must be followed by all those involved in the organisation of such visits/activities.

This document highlights where individual academies within the trust need to set-out their own procedures or have flexibilities within the trust policy. These local arrangements should be recorded in Part C.

A.1.2 Trust Position regarding Educational Visits

The Mercian Trust aims to equip all pupils to live life to the full, enabling them to: realise their potential; thrive in the world of work; and make a positive contribution to the local, national and international community.

Outdoor Learning and educational visits offer unique opportunities to fulfil this aim, contributing significantly to both the curriculum and to the wider development of pupils. They offer the opportunity for developing teamwork, self-confidence, problem solving, self-reliance and responsibility, whilst offering new challenges and environments to support learning. Increasingly Outdoor Learning is being recognised for its contributions to well-being and healthy lifestyles.

Such activities are an integral part of an ambitious and well designed curriculum that gives all learners the knowledge and capital they need to succeed in life¹. In particular they can contribute towards:

- Quality of education through direct curriculum links
- Overall development of knowledge and “cultural capital”²
- Personal development through discovering interests and talents
- Character development, including resilience, confidence, and independence.

The Trust will encourage staff in undertaking visits and will provide support to staff in the detailed planning and organisation of such visits.

Each Academy will ensure that all pupils have an entitlement to take part in enrichment activities in line with the Trust's intent, and that their participation is not prejudiced by any protected characteristic. Each Academy will make reasonable adjustments to enable the inclusion of pupils with a disability or who have medical needs.

¹ OFSTED Education Inspection Framework, May 2019

² OFSTED define “cultural capital” as “the essential knowledge that pupils need to be educated citizens, introducing them to the best that has been thought and said and helping to engender an appreciation of human creativity and achievement”

Each Academy will ensure it offers a varied programme to enable fair access for all pupils and will consider how they use Pupil Premium or other funding to overcome disadvantage and enable participation.

A.1.3 Mercian Trust Intent

The Trust Board has committed to ambitious targets for pupils attending an Academy in the trust. The aim is that as a Trust we will move towards these KPIs over the life of the MAT strategic plan (i.e. by 2025)

- ALL students will be actively encouraged to take part in at least one residential educational visit during their time at school
- ALL students will be actively encouraged to take part in at least one day visit each academic year
- ALL students will be actively encouraged to take part in at least one outdoor learning experience in each subject area during their time at school
- ALL students will be actively encouraged to take part in at least one experience that develops personal and life skills during their time at school.

Academies in the trust should consider how their programme of visits supports the implementation of this intent (and any additional local intent they add) and monitor progress and impact against them.

A.1.4 Sporting Fixtures

Sporting fixtures form a unique type of educational visit which are routinely managed under separate arrangements. However, sports tours or activities which involve an overnight stay or international travel are to be treated as an educational visit under this policy.

A.2 POLICY AND NATIONAL GUIDANCE

The Mercian Trust has adopted the National Guidance published by the Outdoor Education Advisors Panel and we expect all staff involved in the visit process to follow this National Guidance as well as employer and school policy.

OEAP National Guidance is written and kept up to date by leading and informed professionals. Adopting this ensures that our guidance for Educational Visits reflects nationally recognised standards. To ensure that the most up to date National Guidance is accessed, visit the OEAP website: <http://oeapng.info>

Schools in the trust have access to an OEAP member for additional advice:

Mercian Walsall Schools:	Alex Hudson	a.hudson@qmg.merciantrust.org.uk
Mercian Sandwell Schools	Aileen Barlow	aileen_barlow@sandwell.gov.uk
	Christina Grange	christina_grange@sandwell.gov.uk

Where there is perceived conflict between the National Guidance and Trust or academy policy, then clarification should be sought from the relevant adviser.

Throughout this document, reference is made to individual OEAP guidance documents to support aspects of this policy. For instance: **(oeapng x.x)**

A.3 ORGANISATION AND RESPONSIBILITIES

A.3.1 Legal Basis

This policy is based on the provisions of the following acts, regulations and guidance:

- a. Health and Safety at Work Act 1974
- b. Management of Health and Safety at Work Regulations 1999
- c. Health and Safety: Advice on Legal Duties and Powers (Department for Education, June 2013)
- d. School Trips and Outdoor Learning Activities: Tackling the Health and Safety Myths (Health and Safety Executive, June 2011)
- e. Outdoor Education Advisors Panel, National Guidance (<http://oeapng.info>)

The following definitions are applicable:

- a) Duty of Care: “Responsibility to take reasonable care to prevent foreseeable harm.”
- b) Loco Parentis: “The standard of care of a teacher for any student is set at that of a prudent parent but judged in the context of a school where a teacher has responsibility for more pupils than would a parent at home. This responsibility cannot be delegated and applies to all activities and in all situations organised by the school whether in lesson time or after, on or off the school premises.”

A.3.2 Trust Board

As the employer, the Trust has legal responsibility for educational visits. (**oeapng 3.4b**)

The Trust Board will ensure:

- written guidance is available to staff including advice on risk assessment;
- training is provided to ensure staff understand the guidance and their role in delivery;
- provision to competent advice is available through a named adviser;
- appropriate arrangements are in place for the approval of visits, where these are delegated responsibility is clearly defined;
- appropriate insurance cover is in place;
- plans are in place to effectively support academies in the event of a critical incident;
- procedures are in place to monitor compliance with guidance.

A.3.3 Local Governing Bodies

Local Governing Bodies have a key role to enable and ensure high quality visits and outdoor learning experiences through support and challenge as a “critical friend”. (**oeapng 3.4f and 3.3c**)

The LGB should:

- Regularly consider the place of visits and other enrichment activities in relation to the academy’s ethos, aims, programme and effectiveness;
- Ensure an Educational Visits Coordinator (EVC) is in place who meets the Trust’s requirements;
- Agree any delegation of approval and their own involvement in the approval process;
- Support and challenge the Headteacher and EVC, through regular reports, to ensure the academy is providing high quality experiences which are safe and contribute to the academy’s curriculum offer;
- Use Pupil Premium, or other funding, to enable fair access to opportunities for all;
- Ensure arrangements are in place for students with SEND and Medical Needs to ensure visits are inclusive.

Each LGB is to clearly agree how any delegation of approval occurs in the academy (whilst remaining within the scope of this policy), including the degree of involvement the LGB is to have in approval at the planning stage.

A.3.4 Head Teacher

On a day-to-day basis, the Head Teacher is responsible for approving educational visits from their academy.

Where the responsibility for approving some or all visits is delegated by the Head Teacher, they are to have LGB approval and give clear written details of the terms and boundaries of delegation.

In particular, they should ensure that:

- the educational purpose of visits is meaningful and contributes to the broad and balanced curriculum offered by the academy;
- group leaders are competent to lead proposed visits;
- the overall planning is appropriate;
- emergency procedures are in place should a major incident occur during a visit. Where a school contact is not the Head Teacher, that contact must have the authority to make significant decisions;
- serious accidents, incidents and near-misses are thoroughly investigated and reported appropriately.

Further details for Head Teachers are covered in [oeapng 3.4g](#)

A.3.5 Educational Visits Coordinator

Each academy is to appoint an Educational Visits Coordinator (EVC), whose role is to facilitate the effective planning, management and evaluation of all visits within the remit of this policy.

EVC's are to have current OEAP accredited training to support their role.

Further details of the EVC role are covered in [oeapng 3.4j](#)

In particular, the EVC should:

- ensure procedures for the approval, administration and evaluation of visits are followed;
- support group leaders in planning visits;
- scrutinise the planning of each visit, ensuring it is appropriate and of sufficient detail for the complexity of the visit, and support Head Teachers in approval;
- ensure staff or volunteers accompanying visits are competent, confident and accountable ([oeapng3.1b](#));
- assist group leaders with risk assessment and risk management processes;
- liaise with the SENDCO to ensure the adequate inclusion of pupils with Special Educational Needs or Additional Medical Needs;
- Liaise with the DSL to ensure adequate safeguards are in place if required by particular participants, including any individual risk assessments required;
- review and monitor systems, practice and individual visits and activities;
- report regularly to the Local Governing Body on the visits taking place;
- contribute to periodic Trust EVC meetings.

A.3.6 Visit Leader

One member of staff must have overall responsibility for the planning, management, supervision and conduct of any educational visit or activity. The Visit Leader is the **key person** in ensuring the successful and safe delivery of the planned activity. ([see oeapng 3.4k](#))

The Visit Leader is expected to remain with the group and stay in the same accommodation, close to the group, unless specific approval has been given for remote supervision.

Any member of staff may be the Visit Leader providing they are sufficiently competent, confident and accountable. When approving the visit the Head Teacher will consider the complexity of the visit against the experience and ability of the suggested visit leader.

(see [oeapng 3.2d – Approval of Leaders](#))

The visit leader must

Before the visit:

- have the experience, and when appropriate qualifications, to safely control the group on the planned activity and to lead the team of supporting adults;
- be aware of and adhere to National Guidance and the Trust's policy when planning a visit;
- gain initial approval to conduct the visit from their Head Teacher or LGB as required;
- complete all necessary planning and preparation before the visit, including assessing the risks to participants (see visit leader checklist at [oeapng 3.3e](#));
- liaise with the Trust finance team and ensure all financial controls are in place, including an agreed budget before launching the trip;
- provide written information to parents and ensure appropriate consent is obtained;
- clearly define the roles and responsibilities of other staff or volunteers accompanying the visit;
- follow the Trust's approval system by providing full details on EVOLVE.

During the visit:

- maintain appropriate levels of supervision throughout the visit;
- ensure that all activities are appropriate for the age, aptitude and experience of the participating students;
- provide adequate briefings to participating students, staff and volunteers;
- through dynamic risk assessment, adjust plans as necessitated through changing circumstances, including being prepared to stop an activity;
- be aware of any child protection or medical issues of pupils participating in the visit;
- appoint a member of staff (which may be themselves) to deal with any first aid needs that arise;
- be aware of their academy's critical incident procedure and have the necessary contact details to deal with an emergency;
- remain responsible for finances given to them for the visit including obtaining receipts for expenses.

After the visit:

- review the visit and record brief details on EVOLVE;
- provide a record of financial transactions during the visit to the Trust finance team and return receipts for all expenses;
- follow the reporting procedures for any incidents or accidents that happened during the visit.

A.3.7 Assistant Leaders

The group leader will often be supported by a number of other members of staff. All adults accompanying a visit act in "loco parentis" and have a duty of care towards those they are supervising; this duty requires them to do everything they reasonably and practicably can to ensure the health, safety and welfare of participants. ([see oeapng 3.4l](#))

The visit leader must ensure that all accompanying staff are clear about what they are required to do during the visit. Accompanying staff should:

- Be familiar with the risk assessment for the trip and follow this advice;
- Be clear of exactly who they are responsible for supervising if the group is separated;
- Know how to contact the group leader at all times;
- Know what to do in an emergency;
- Bring to the Group Leader's attention any risks they feel are not acceptable;
- Be prepared to immediately act if they feel an action will place an individual at risk;
- Contact the Head Teacher (or other SLT member) if they feel their concerns are justified but are being ignored.

A.3.8 Volunteers (including parents & student teachers)

Where the visit leader proposes to use volunteers (such as parents, student teachers or other adults) to assist and/or accompany the visit, this must be discussed early during the planning stage and the National Guidance [oeapng 3.4m – Helpers](#) and [oeapng 3.4o – Volunteers](#) followed.

A.4 PLANNING AND APPROVAL

The Trust operates an online approval system, EVOLVE, for all trip management.

EVOLVE allows the Trust to:

- Keep all key personnel informed about planned activities and track the process of a visit during the planning stage;
- Reduce the administrative burden on visit leaders when planning and allow them to work at a time and location convenient to them;
- Track the involvement of students;
- Provide essential information in the event of an incident occurring;
- Provide documented proof of appropriate planning;
- Evaluate provision and allow reference to similar trips by those planning in the future;
- Keep records of activities for statistical purposes.

The system includes an Outline Approval process for initial approval before the visit is launched and tracks all details of planning before, during and after the trip.

[Some visits may require LGB referral at this Outline Approval stage. Details should be provided by each LGB in Part C – Local Arrangements.](#)

Once the details are in EVOLVE the visit leader will “submit” the form. The visit will then be scrutinised by the EVC before being passed to the Head Teacher or delegated approver.

Higher Risk activities are subject to an additional level of scrutiny at Trust level. This includes:

- Any visit outside England, Scotland or Wales
- Residential activities
- Adventurous activities (either on-site or off-site, with caveat below)
- Visits with significant elements of remote supervision (eg DofE Expeditions)

In order to allow for detailed checking and confirmation, the following are Minimum timescales:

Single day visits	2 week
UK Residential Trips	4 weeks
Higher Risk Activities in UK	4 weeks
International Visits	6 weeks

These times allow an opportunity to rectify any concerns or queries whilst still allowing the trip to proceed.

Further details about the EVOLVE system and its use are in Part B.

A.5 MONITORING AND EVALUATION

The Trust encourages a reflective practice approach in all activities in order to continually improve the quality of activities we offer. We therefore encourage all trip leaders to include arrangements for Reviewing visits. Further details of Review and Evaluation, including student feedback, is included in Part B.

There is a legal requirement to monitor the Health and Safety arrangements in all activities, including Educational Visits. This is primarily conducted by the EVC and MAT when visit

arrangements are scrutinised at the approval stage. The Trust also encourages some field monitoring of visits and visit leaders is conducted. Further details are in Part B.

A.6 TRAINING AND DEVELOPMENT

Safe and successful execution of visits relies on staff who are accountable, confident and competent. Competence is a combination of the skills, knowledge, awareness, judgement, training and experience needed to carry out their role.

The Trust requires the EVC in each academy to hold a current OEAP accredited EVC training certificate and will arrange regular meetings for EVCs to share good practice and issues.

The Trust strongly recommends staff taking a key role in visits to have appropriate training to assist them in their role.

Completion of suitable training only goes part way towards establishing competence. OEAP National Guidance provides clear advice regarding the assessment of visit leader competence ([oeapng3.2d](#)).

EVC and Head Teachers need to satisfy themselves about the suitability of that person to lead that group on that visit/activity in that environment.

A.7 RISK MANAGEMENT AND RISK BENEFIT ASSESSMENT

As an employer the Mercian Trust has a legal duty to ensure that risks are managed – requiring them to be reduced to an “acceptable” or “tolerable” level. This requires that the risk management of an activity should be informed by the benefits gained from doing it. The starting point for this “Risk-Benefit Assessment” approach should be a consideration of the intended benefits and learning outcomes. Staff need to “strike the right balance”³ when assessing risks, focussing on the real risks to participants and how these will be controlled and harnessed to provide appropriate learning experiences. HSE endorse this “sensible risk management” approach and advocate that it is important that young people are exposed to well managed risks so that they learn how to manage risk for themselves.

It is a legal requirement for the risk assessment process to be formally recorded and for suitable and sufficient control measures to be identified and implemented for all significant risks (ie those that may cause serious harm to individuals). However the process of assessing risks is not just a paperwork exercise – you are recording the process of decisions you have made whilst planning the activity.

Thorough Risk Assessment underpins the decision making process regarding educational visits. This process will usually involve a combination of:

- Generic Visit Risk Assessments or Standard Operating Procedures of the trust or academy
- Policies, guidance or information supplied by the venue or tour agency
- Activity Risk Assessments prepared for the specific visit or activity on a once-only basis.

Further details in Part B together with OEAP National Guidance document [4.3c – “Risk Management, an overview”](#) provide more detailed guidance.

³ See *School Trips and Outdoor Learning Activities – Tackling the health and safety myths* HSE 2011

Group Leaders and Accompanying Staff are responsible for continually assessing risks during an activity or visit, known as Dynamic Risk Assessment. When hazards come to light which had not been previously identified, steps should be taken to reduce them to an acceptable level or if this is not feasible the activity must be stopped.

Adults accompanying any visit must be clear of what their role is if things should not go according to plan or if accidents occur. In particular they must know how to contact the Academy Home Contact (usually the Head Teacher) and understand their part in implementing the Academy's Critical Incident Plan. Further details are included in Part B.

A.8 ASSESSING VENUES AND PROVIDERS

The Trust requires any commissioned provider, purchased or otherwise, providing Educational Visits or Outdoor Learning activity to work within the OEAP National Guidance and to be able to demonstrate their compliance.

Further details on using Venues and Providers is included in Part B.

A.9 INCLUSION

Academies must make every effort to ensure that Educational Visits are available and accessible to all who wish to participate irrespective of disability, special educational or medical needs, gender, religion, or other protected characteristic.

The Mercian Trust expects academies to work within the principles of inclusion:

- an entitlement to participate
- accessibility through adaptation or modification, including the provision of auxiliary aids and services
- integration through participation with peers

If a visit is to cater for pupil with particular needs, reasonable adjustments in terms of a suitable venue, additional supervision, resources or support may be needed or activities may need to be adapted. Early discussion with all parties concerned, including parents, about what is needed will enable plans to be drawn up to meet these needs in most situations. These should enable the pupil to take part safely alongside their peers and for the whole group to be actively involved and benefit from the visit.

Further guidance can be found in [oeapng 3.2e – Inclusion](#).

An individual risk assessment may be appropriate. Visit Leaders are responsible for ensuring a provider is fully informed of all relevant information including medical, emotional, dietary including allergens and behavioural needs to enable them to fulfil their duty of care.

A.9.1 Medical Conditions

Visit leaders need to know accurate information about the medical conditions of pupils they are taking on a visit, including both physical and mental health.

Visit Leaders should be aware of any pupil participating in a visit who is prescribed medication. They should make specific arrangements with parents to ensure this is adequately managed, including what to do in an emergency.

Where pupils require Emergency Medication (such as asthma inhalers or adrenaline auto-injectors) they should have this readily available with them on the visit.

A.10 INSURANCE

The Mercian Trust is a member of the Department for Education's Risk Protection Arrangements for Academies (RPA) scheme which provides insurance for all school visits. Details of the scheme are available at <https://www.gov.uk/guidance/academies-risk-protection-arrangement-rpa>

There are some trips arranged that are contractually agreed between the parent and the company, for example, expeditions and volunteer work in remote countries. In these cases, parents are strongly advised to purchase the additional insurance that these companies recommend.

A.11 FINANCE

There are specific legal conditions regarding charging for educational activities, these are explained in the MAT policy for Charging and Remissions. The National Guidance document **3.2c – Charging for School Activities** also provides good guidance.

Many visits will take place mostly in school time or relate to an examination course we are preparing pupils for, meaning we may not legally charge and must seek voluntary contributions. This must be indicated clearly in the parental letter and an indication that the visit may not go ahead if insufficient contributions are received included.

Other visits including all international trips will be optional extras and may be charged in full.

Visit leaders will need to consider carefully the financial aspects of a trip, bearing in mind it is important for the trip's budget to balance.

The budget for ALL visits is to be checked at the Outline Approval stage, in advance of any communication to parents. Budgets should include provision for all costs and the trust's administration charge. Parents should be advised of the proposed cost of any activity when first seeking nominations.

Visit leaders will need to liaise with the finance office who will administer payments. Payment preference for all payment is through ParentPay. All visits are to include an administration fee of 2% to cover the ParentPay transaction fees.

Visit Leaders should utilise the pro-forma letters in order to ensure that the financial arrangements are detailed correctly. This is especially important for larger and more expensive trips, when such a letter essentially forms the terms and conditions for booking. Copies of such letters are available in the Library inside EVOLVE.

PART B. PROCEDURES

B.1 PLANNING AND APPROVAL PROCEDURES

B.1.1 EVOLVE System Outline

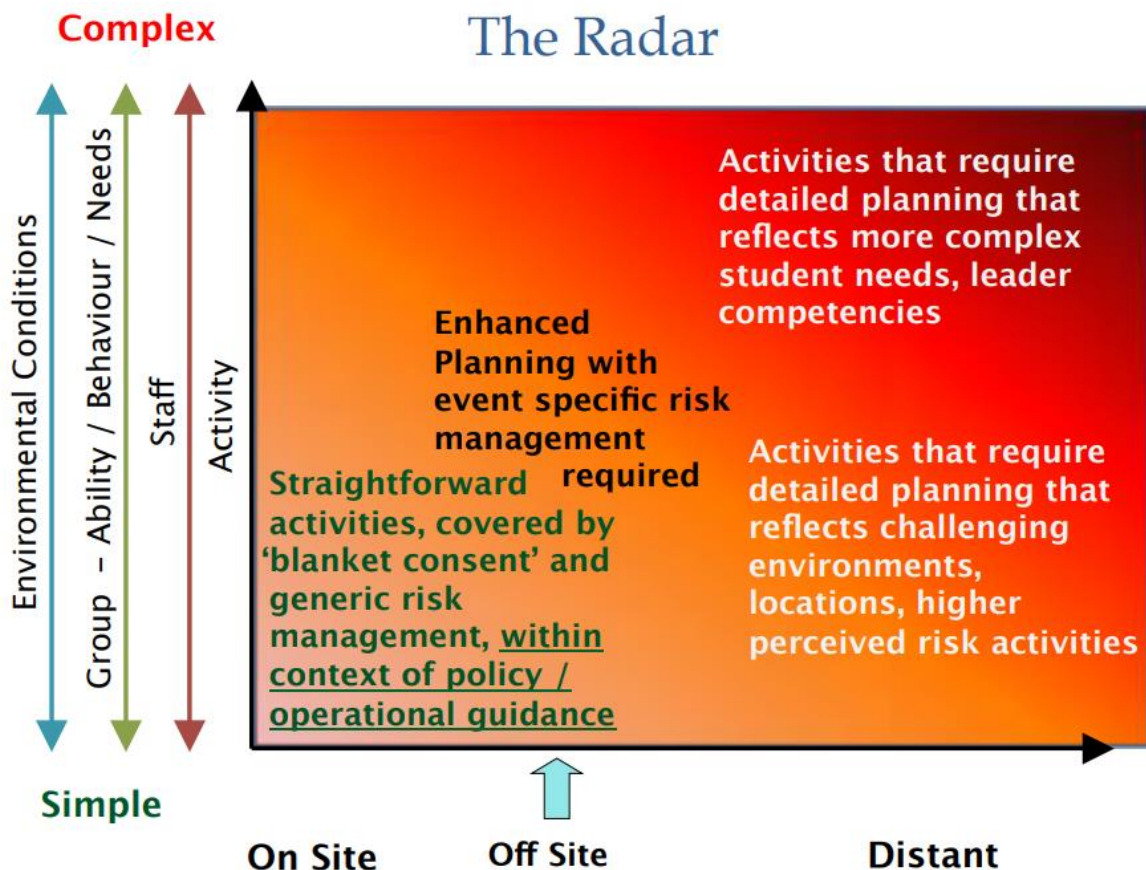
The Trust operates an online approval system, EVOLVE, for all trip management. This can be accessed at <https://evolve.edufocus.co.uk/> and selecting “The Mercian Trust” from the drop down list of establishments.

EVCs in each school can provide log-in details to members of staff.

EVOLVE allows the Trust to:

- Keep all key personnel informed about planned activities and track the process of a visit during the planning stage;
- Reduce the administrative burden on visit leaders when planning and allow them to work at a time and location convenient to them;
- Track the involvement of students;
- Provide essential information in the event of an incident occurring;
- Provide documented proof of appropriate planning;
- Evaluate provision and allow reference to similar trips by those planning in the future;
- Keep records of activities for statistical purposes.

The level of detail provided on EVOLVE should reflect the complexity of the planned activity, utilising the SAGED Radar ([oeapng 9a](#)): a small trip with few pupils might have relatively few details, whereas an international trip should be much more comprehensive. Ultimately the details need to provide essential information for use in the event of an emergency.



B.1.2 Outline Approval

Visit leaders are recommended to discuss their initial ideas informally with their EVC or Head Teacher early.

The Visit Leader should then seek Outline Approval using EVOLVE as soon as possible at the beginning of planning.

Sufficient detail is required in order for the Head Teacher to make an informed decision about the educational benefit (**oeapng 5.2b – Planning Basics**) and the suitability of the proposed visit leader against the complexity of the visit (**oeapng 3.2d – Approval of Leaders**).

The proposed launch letter, approved budget and outline itinerary should be attached.

LGB approval may be required for certain visits, as determined by each LGB.

B.1.3 Detailed Planning

Once granted Outline Approval, the Visit Leader should commence detailed planning. Assistance and support is available from the EVC to help during this process. The visit leader checklist at **oeapng 3.3e** provides a useful reference point.

Using EVOVLE: EVOVLE should be used to track planning **throughout** the process. As information becomes available it should be uploaded and not left until the last minute.

Finances: Visit Leaders will need to frequently liaise with the finance team during the planning process to ensure that all financial arrangements are in place and that payments are up to date.

B.1.4 Formal Approval

When planning is complete and all details are included on EVOLVE, the Visit Leader should “submit” the form for approval.

The details will then be scrutinised by the EVC before being passed to the Head Teacher or delegated approver.

Higher Risk activities are subject to an additional level of scrutiny at Trust level.

In order to allow for detailed checking and confirmation, the following are Minimum timescales:

Single day visits	2 week
UK Residential Trips	4 weeks
Higher Risk Activities in UK	4 weeks
International Visits	6 weeks

These times allow an opportunity to rectify any concerns or queries whilst still allowing the trip to proceed.

Higher Risk Activities:

The Trust will have oversight of Higher Risk activities and scrutinise plans. This includes:

- Any visit outside England, Scotland or Wales
- Residential activities
- Adventurous activities (either on-site or off-site, with caveat below)
- Visits with significant elements of remote supervision (eg DofE Expeditions)

Trust scrutiny of activities marked ** may be waived when routinely conducted on-site by a member of academy staff with a suitable NGB instructor award. This will be documented in Part C - Academy Arrangements.

Adventurous Activities include:

Multi-activities at commercial centre	Abseiling	Air activities (less commercial flights)
**Archery	Assault courses	Bell boating
Bushcraft	Camping in wild country	Camping on campsites
Caving	Clay pigeon shooting	**Climbing walls
Coasteering	Cycling (road or track)	Dog sledging
Dragon boating	**Field/Environmental studies	Free running
Go Karting	Gorge walking	Ghyll scrambling
Hang gliding	Horse/pony riding	Hovercraft
Improvised rafting	Jet skiing	Kayaking
Kite surfing	Mine exploration	Motorised sports (all)
Mountain biking	Mountain boarding	Open Canoeing
**Orienteering	Paintballing	Pot-holing
Powered boats	Rock climbing	Ropes courses (High/Low)
Rowing	Sailing	Scuba diving: indoor pools
Scuba diving: lake & sea	Segway	**Shooting
Skateboarding	Skiing & snowboarding	Snorkelling
Surfing/body boarding	Swimming (non-curriculum)	**Trampolining
Walking: Hill & Moorland	Walking: Lowland	Walking: Mountain
Water skiing	White water rafting	Wind surfing/sailboarding

B.1.5 Before Departure

Before departure Visit Leaders should ensure that they:

- Inform relevant colleagues about students who will be out of school
- Include a nominal roll on EVOLVE
- Are aware of any medical conditions of students
- Have appropriate consent
- Amend on the day of departure any lists for last minute changes

B.1.6 During the Visit

The Visit Leader is responsible for ensuring the safety and welfare of those under their care throughout the visit until they are either returned to normal school routine or collected by parents.

The Visit Leader should contact the School, Head Teacher or EVC during the visit if they wish to discuss any issues which arise. They should keep the school informed of any significant changes to the approved plan.

B.1.7 After the Visit

On return from the visit the Visit Leader should ensure the visit is evaluated on EVOLVE.

Any accidents or incidents which occur during the visit must be reported using the usual school procedures.

B.2 MONITORING AND EVALUATION

B.2.1 Review

Reviewing is the process of reflecting upon an experience in order to learn from it.

This can occur at participant level, where pupils review how the activities they have done contributes to their learning.

It can also occur at Leader or Establishment level when we ask “how did that go?” or “if we did this again what might we change?”

More ideas and guidance in reviewing is in [oeapng 4.2c](#)

Participant Feedback

Gaining feedback from participants might form a part of the review process and be beneficial to the leader and student. Electronic forms provide an easy way to conduct this.

Review on EVOLVE

We expect group leaders to briefly review ALL visits on EVOLVE to highlight whether it worked and whether any incidents occurred that need following up.

B.2.2 Evaluation

Evaluation is a more formalised process than Reviewing, that seeks to make an overall judgement about the quality of the experience and whether it was worthwhile. It would consider the aims of the activity against the observed output and the costs against the perceived benefits. A formal evaluation might be conducted when considering whether to repeat a visit the next year, or when providing reports to provide evidence demonstrating how the visit contributed to a department’s curriculum.

More guidance on this formal evaluation is in [oeapng 5.1d](#)

B.2.3 Monitoring Arrangements

There is a legal requirement to monitor Health and Safety arrangements in all activities including Educational Visits. This is primarily conducted by the EVC and MAT when visit arrangements are scrutinised.

It is recommended that some field monitoring of specific visits and visit leaders is conducted. This could be done by the EVC themselves or take the form of peer coaching by members of staff on the visit. A suitable form, linked to national benchmarks in Outdoor Learning, is available.

EVCs are to undertake periodic monitoring and reporting of visits as determined by the Trust, in order to evaluate the implementation and impact of educational visits in the academy.

B.3 TRAINING AND DEVELOPMENT

Safe and successful execution of visits relies on staff who are accountable, confident and competent. Competence is a combination of the skills, knowledge, awareness, judgement, training and experience needed to carry out their role. Staff involved in school visits are reminded that they must have due care to the MAT staff code of conduct.

B.3.1 Educational Visits Coordinator

The EVC in each academy must hold a current OEAP accredited EVC training certificate (valid for 3 years).

The trust will arrange termly meetings for EVCs in order to share good practice or issues.

B.3.2 Visits Leader Training

OEAP accredited Visit Leader Training is available and is strongly recommended for staff leading and/or taking a key role on a visit.

B.3.3 Endorsement of Visit Leaders

Completion of a suitable training course only goes part way towards establishing competence. OEAP National Guidance provides clear advice regarding the assessment of visit leader competence ([oeapng3.2d](#)).

EVC and Head Teachers need to satisfy themselves about the suitability of that person to lead that group on that visit/activity in that environment.

EVOLVE keeps records of all visits a member of staff has led or accompanied as well as specialist qualifications, so can be used to track the experience of staff.

B.3.4 Accompanying Staff and Volunteers

Other staff and volunteers participating in educational visits must only be given roles commensurate with their competence. It is the responsibility of the visit leader to ensure they are clear in their roles and responsibilities and to brief staff accordingly.

B.3.5 Apprenticeship model

Competence is not necessarily related to age or position in an establishment. Competence is also situational – a leader who is competent in one activity or environment may not be so in another. Relevant experience is not necessarily gained by repeating the same thing several times, but by experiencing a range of different activities and environments.

The Trust embraces the Apprenticeship model, where shadowing an experienced and competent visit leader can develop staff in preparation to become future leaders themselves. By taking responsibility for less complex and lower risk visits first, skill sets can be developed and confidence built.

B.3.6 Ongoing Development

Staff who frequently act as Visit Leaders are encouraged to take ownership of their own continuing development through training, professional accreditation and regional networks of organisations such as the Institute for Outdoor Learning or specialist activity associations.

B.3.7 Supporting Qualifications

Training in First Aid and the MIDAS Minibus Awareness scheme is available.

B.4 RISK MANAGEMENT AND RISK-BENEFIT ASSESSMENT

B.4.1 Risk Management

As an employer the Mercian Trust has a legal duty to ensure that risks are managed – requiring them to be reduced to an “acceptable” or “tolerable” level. This requires that the risk management of an activity should be informed by the benefits gained from doing it. The starting point for this “Risk-Benefit Assessment” approach should be a consideration of the intended benefits and learning outcomes. Staff need to “strike the right balance”⁴ when assessing risks, focussing on the real risks to participants and how these will be controlled and harnessed to provide appropriate learning experiences. HSE endorse this “sensible risk management” approach and advocate that it is important that young people are exposed to well managed risks so that they learn how to manage risk for themselves.

It is a legal requirement for the risk assessment process to be formally recorded and for suitable and sufficient control measures to be identified and implemented for all significant risks (ie those that may cause serious harm to individuals). However the process of assessing risks is not just a

⁴ See *School Trips and Outdoor Learning Activities – Tackling the health and safety myths* HSE 2011

paperwork exercise – you are recording the process of decisions you have made whilst planning the activity.

Thorough Risk Assessment underpins the decision making process regarding educational visits. This process will usually involve a combination of:

- Generic Visit Risk Assessments or Standard Operating Procedures of the trust or academy
- Policies, guidance or information supplied by the venue or tour agency
- Activity Risk Assessments prepared for the specific visit or activity on a once-only basis.

National Guidance document [4.3c – “Risk Management, an overview”](#) provides more detail.

B.4.2 Generic Visit Risk Assessments

A number of Generic Risk Assessments are included within EVOLVE that group leaders may utilise. By selecting one of these generic risk assessments the visit leader is confirming they have read the assessment and are agreeing they will implement the control measures it contains.

Alternatively a group leader could use these Generic Risk Assessments as a template where they feel they need to vary some control measures for their specific activity.

B.4.3 Risk Assessment Process

Steps involved in risk assessment:

1. Decide what hazards there are.
2. List any existing control measures (including through generic risk assessments)
3. Decide whether any further control measures are required and record them
4. Make an assessment whether the level of residual risk is acceptable
5. Review your risk assessments periodically or if there is reason to think they are no longer valid.

We recommend following the National Guidance system of “SAGED risk assessment”, considering:

Staff
Activity
Group
Environment
Distance to base

B.4.4 Specific Risk Assessment

After considering the Generic Risk Assessments and considering the activities on the visit, there will probably be a few risks remaining.

A **specific** Risk Assessment deals with these remaining issues. It can be recorded using the simple template provided, or dealt with as an Event Specific Note within EVOLVE.

Some visit leaders may have already produced Specific Risk Assessments in an alternative template which will be acceptable providing they identify the hazards and indicate the control measures you will implement.

B.4.5 First Aid

The level of First Aid provision for a trip must be considered at the planning stage and should be determined on the basis of the risk, taking into account the specific nature of the planned visit.

(see [oeapng 4.4b](#))

For ALL visits an adult (who may be the visit leader) must be nominated as being responsible for taking charge of First Aid emergencies. As a minimum they must have a working knowledge of first aid and be able to summon assistance. They should have suitable first aid materials with them commensurate with the planned activity.

Where a group of young people is subject to remote supervision (for instance a DofE expedition) they must have the ability to contact medical support in an emergency and an appropriate level of competence and first aid materials to look after themselves until help arrives.

Any instances when first aid is necessary must be reported in line with academy procedures. Staff should also follow the reporting requirements of any premises they are visiting.

B.4.6 Communicating Safety Arrangements

Writing down the most detailed risk assessment ever will not help to make your visit safe unless those involved know what measures you have decided! The **results** from the risk assessment must be clearly communicated to staff and participants.

This could be done by distributing the risk assessment itself to staff and asking them to acknowledge it; or through suitable briefings to staff and pupils (written or verbal).

For higher risk or more complex situations it is often advisable to write down the points you will make in your briefing to ensure you cover them all.

B.4.7 Dynamic Risk Management

Group Leaders and Accompanying Staff are responsible for continually assessing risks during an activity or visit. When hazards come to light which had not been previously identified, steps should be taken to reduce them to an acceptable level or if this is not feasible the activity must be stopped.

B.5 ASSESSING VENUES AND PROVIDERS

B.5.1 Venues and Providers

A **venue** is a location being attended by the visit where the academy staff retain full supervision of pupils. The venue might provide some input (for instance a tour guide or workshop facilitator) but it is clear that school staff remain in charge.

A **provider** is an organisation that shares the responsibility of supervision and control. This might be at an outdoor activity centre where a specialist instructor is responsible for a session or a tour operator which has booked the activities on your behalf.

Note that depending how you answer the question on EVOLVE it will ask different follow-up questions!

B.5.2 Using Providers

The Trust requires any commissioned provider, purchased or otherwise, providing Educational Visits or Outdoor Learning activity to work within the OEAP National Guidance and to be able to demonstrate their compliance.

The trust encourages the use of providers with National Benchmark Accreditation, such as the LOTC Quality Badge, AHOEC Gold Standard and STF membership. Where such accreditation is held the need for further assurance is reduced.

B.5.3 Providers without National Benchmarks

Where a provider does not hold a National Benchmark Accreditation, then further assurance in line with **oeapng 4.4h** will be required and the provider will be required to complete the OEAPNG Provider Statement (**oeapng 8p**).

B.5.4 Provider's Risk Assessments

Visit Leaders do not need to ask for copies of provider's risk assessments, but should seek any information specifically aimed at helping visit leaders to manage their visit and complete their own risk-benefit analysis.

B.6 PUPILS

B.6.1 Pupil Involvement

Group Leaders organising visits should be clear about the criteria for selecting pupils at an early stage of the planning process. They should also be clear about the minimum and maximum numbers which are viable. It may well be necessary to operate a list of reserves if the trip is oversubscribed, in which case the Group Leader needs to be able to justify which pupils are selected and which are reserves.

B.6.2 Supervision Ratios

There is no set supervision ratio for visits. A decision is made on the basis of risk assessment using the SAGED approach. (**oeap National Guidance 6b**)

A recommended ratio for most visits would be 1 adult to 15 pupils.

For residential visits there is to be a minimum of 2 staff.

B.6.3 Assistance from older pupils

Suitable older pupils, may on occasion be used to *assist* with the supervision of younger pupils during a visit. However, it must always be remembered that they are still pupils themselves – the trust has an equal duty of care to them and they must be included as pupils when calculating ratios.

When used to assist they should be given a clear briefing about their role. The following points should be covered as appropriate:

- Who they are responsible for (ie which sub-group)
- The bounds of the activity (where they can go and where they can't)
- How to contact members of staff
- Guidance about what is and what is not appropriate behaviour within the context of the trip or activity, and when they should seek help/support from staff.

B.7 EMERGENCY PROCEDURES AND INCIDENT REPORTING

Any minor accidents on a visit should be dealt with promptly by the Visit Leader or other accompanying staff. The academy's accident report procedure must be completed and any reporting requirements of the venue must also be satisfied.

Academies within the Trust are required to have an emergency response plan (critical incident plan) that covers what to do if there is an incident away from school, or if there is an incident back at the academy that might affect visit currently occurring.

Examples of an emergency might be:

- An accident leading to a fatality or serious injury
- Serious illness
- circumstances in which a party member is/might be seriously at risk
- circumstances affecting a member of staff that compromises their ability to supervise the visit
- any other situation in which the press or other media are or may be involved
- significant delays that need to be communicated to parents/carers

The visit leader for every visit is to have the name and contact details for a “Home Contact”. During school hours this may be the main school number. Out of hours it will often be the Head Teacher, but if they are not available another suitable person must be nominated.

In the event of an emergency the Visit Leader should contact the Home Contact. Visit Leaders need to be clear about what support they need – the Home Contact, however experienced, is not at the scene and will not be fully aware of the situation.

During a serious incident Visit Leaders need to be mindful of the need to control the passage of news. All academies have procedures in place to notify families in the event of a death or serious injury; it is important these processes are given time to be implemented and that news does not spread through gossip and rumour, especially through social media.

A useful guide for Visit Leaders in an emergency is reproduced below from [oeapng 4.1k – Visit Leader Emergency Checklist](#).

Any incident that occurs on a visit should be reviewed with the EVC on return in order to learn from what happened.

	IMMEDIATE ACTION		✓
Preserve	Ensure own safety		
	<i>All subsequent actions are better delegated to other members of the leadership team when possible - allowing the Visit Leader to remain in charge of the whole situation</i>		
	Ensure safety of uninjured group members and other leaders		
	Ensure safety of any casualties and triage		
	Deal with life threatening first aid		
	Call emergency services as appropriate		
	URGENT ACTION - Do this efficiently and concurrently if possible		✓
Prevent Worsening	Take stock and make a plan		
	Allocate resources to maximise concurrent activity		
	Continue first aid		
	Inform emergency contact as per your plan		
	Liaise with emergency services as they arrive		
	Deal with urgent physical needs of group:	Shelter	
		Warmth	
		Water	
	Deal with urgent emotional needs of group:	Remove from stress	
		Protect from intrusion	
Useful things to do			
Control outward communications			
Begin written log/note keeping			
	FOLLOW UP ACTION - Much of this can be done at the same time as Urgent Action with efficient use of people (including young people) and resources		✓
Promote Recovery	Take stock again and re-plan next phase – what have you forgotten?		
	Deal with casualties in care of emergency services:	Accompanied to hospital	
		Keep track of who is where	
	Consider needs of self and fellow leaders – are you/they coping?		
	Liaise with establishment/employer as per your emergency plan		
	Deal with further physical needs of group:	Food	
		Toilets, washing facilities, clean clothes	
		Accommodation and/or onward transport	
	Deal with further emotional needs of group:	Emotional support	
		Contact with home	
Deal with press – via employer			
Contact support agencies e.g. travel company, insurers, Consular Assistance Team			

B.8 BEHAVIOUR

Academy staff should apply their overarching behaviour policy, as set out in the Home-School Agreement, during all school activity, including educational visits. Visit leader should ensure they take time to define expectations since the different environment means these will be slightly different from the classroom norm.

Visit Leaders who are organising longer or more complex trips are encouraged to employ a written code of conduct which pupils (and possibly parents) are required to sign and follow. This will be the norm for International Trips and should specifically set out the implications of poor behaviour.

In the event of severe poor behaviour the academy may require parents to collect pupils from the activity location or to meet the costs of returning the pupil home.

Careful consideration should be given to pupils whose behaviour might pose a serious risk to themselves or others during a visit. An individual risk assessment may be required and a balanced

and reasoned decisions reached as to whether control measures are suitable and sufficient to enable the young person to participate.

B.9 PARTICIPANT INFORMATION, CONSENT AND DATA PROTECTION

B.9.1 Initial Launch

The initial launch letter for the trip should contain sufficient information for parents to understand what is being offered. Of crucial importance is that financial information is spelt out clearly at this point. Proforma letters which can be adapted for visits are available and should be used.

B.9.2 Visit Detail

For all visits, Visit Leaders must ensure that Parents are adequately informed of the arrangements; they must be able to give *informed* consent.

Specifically the following should be covered:

- Times and locations for arrival and dispersal
- Educational Aims of the venture
- Details of the activities planned
- Cost and Financial Arrangements
- Who is the Visit Leader
- Supervision arrangements, in particular any prolonged remote supervision
- Transport arrangements (in particular if staff cars will be used)
- What clothing, kit or equipment pupils require
- Pocket money requirements
- Security and Insurance (where appropriate, eg foreign trips)
- Behaviour expectations and the need for parental support

Visit Leaders may choose to give this information in a variety of formats. For most visits a simple letter will be sufficient; for longer or foreign trips it can be very useful to have a parental information evening which also allows parents to ask questions.

Visit Leaders must also ensure pupils are appropriately briefed and prepared for a visit. Again this can take a number of formats (verbal or written) and may be combined with the information for parents. Staff may decide to produce their own information sheet or conduct the briefing verbally.

B.9.3 Consent

Each academy is to set out how they obtain consent.

This could be via paper consent forms or a digital equivalent. There may be differences depending on the type/frequency of the visit.

The Trust expects *parental* consent for visits, even if the pupil concerned is over 18.

Individual academies may vary this requirement with Trust agreement.

Group Leaders must ensure that parents are in a position to give *informed* consent, they must know what activities their child will be participating in during the visit.

B.9.4 Data Protection

The Trust's data protection policy should be followed. In particular hard copy consent forms must be securely managed. Unless there is an accident or incident on the visit which requires the

consent forms to be kept for legal reasons, the forms should be confidential destroyed after the visit.

Where an incident or accident occurred, a copy of ALL consent forms from the trip should be placed on permanent record together with a detailed report of what occurred. Refer to the Trust Data Protection Policy for details of how this should be stored and the appropriate retention period.

PART C. LOCAL ARRANGEMENTS

Each academy within the trust is to complete the information in this section.
Additional academy-specific guidance may also be included.

C.1 ACADEMY DETAILS

Academy specific arrangements for:	
Head Teacher:	
Educational Visits Coordinator:	
Latest OEAP Accredited EVC Training completed	
Date these arrangements were last considered by LGB	

C.2 VISIT APPROVAL ARRANGEMENTS

Educational visits are approved by: <i>(Where this is not the Head Teacher give date initially approved by LGB and date last ratified)</i>	
Approval of certain types of Educational Visits is delegated as follows: <i>(Include date initially approved by LGB and date last ratified)</i>	

C.3 LGB INVOLVEMENT

What types of visits need to be approved by the LGB and at what stage of planning? How is this achieved?	
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How does the LGB want to receive reports on Educational Visits?	
How does the LGB satisfy itself that Educational Visits run by the Academy are high quality, safe and contribute to the broad and balanced curriculum offer of the school?	

C.4 ACADEMY SPECIFIC GUIDANCE OR VARIATION

A.1: Intent <i>List any additional policy intent targets specific to the academy</i>	
A.3: Roles & Responsibilities	
A.9: Inclusion	
A.10: Insurance	
A.11: Finance	
B.1: Planning Procedures	
<i>B.1.4 Routine adventurous activities conducted on site where MAT scrutiny is waived, and how safety of these is assured</i>	
B.2: Monitoring & evaluation <i>How is monitoring conducted in the Academy? Is any Field Monitoring conducted?</i>	
B.3: Training & Development	
B.4: Risk Management	
B.5: Venues & Providers	
B.6: Pupils	
B.7: Emergency Procedures	
B.8: Behaviour	
B.9: Information & Consent <i>Include details of how consent is normally obtained and any different levels employed.</i>	

