

Summary of guidance

This summary is provided as a source of quick reference or for anyone who wants a quick over view of the core content. More comprehensive detail can be found via the main content.

Responsibilities

The Local Authority will undertake an ongoing Educational Visit Coordinator (EVC) training and support programme to ensure that there is an EVC in every Local Authority school / centre. The EVC will perform a number of key tasks:

- Assessing the competency of staff and volunteers working on educational visits, ensuring appropriate checks are in place
- Approve 'normal' visits within the school / centre based system
- Notify the Local Authority of any visits abroad
- Notify the Local Authority for those visits in Category C and C1
- Maintain records of all visits, staff records, incident and accident reports
- Liaise with staff, offering advice, support and knowledge regarding educational visits
- Liaise with the Head and Governing Body as required

Community and Voluntary Controlled Schools will maintain the post of EVC using the guidance in 'Standards for Local Authority's': points 5 - 8. If Foundation and Voluntary Aided Schools are working in partnership with the Local Authority then they must also comply with the above criteria.

The full reference provides information on other key responsibilities for Governors, Headteachers, Visit Leaders, Accompanying Adults, Volunteers and Young People.

Categories for educational visits approval and endorsement

CAT	Time scale for approval	Approver	Activity description	Form
A	Local procedures determine the timescale.	Educational Visits Coordinator (EVC) or Youth Work Manager or equivalent.	Any event in the city locality and within normal hours of a low risk category, sports events, visits to parks and shops, cultural and environmental activities, interschool centres activities.	PSOE1 or local alternative. Risk assessment
B	Local procedures determine the timescale.	EVC or Youth Work Manager or equivalent.	Adventure activities delivered by a licensed Adventure Activities Licensing Authority (AALA) provider, residential activities within Devon, youth work and extended day sessions in the United Kingdom (UK). Youth Centre normal active hours.	Form PSOE1 with risk assessment attached

C	Local procedures determine the timescale but Local Education Authority (LEA) notification for sample monitoring is recommended at the earliest opportunity and not less than five full working weeks before departure.	Initially the person identified in the local or service guidance then Local Authority Outdoor Education Adviser (OEA). Finally either the Youth Work Manager. EVC or PYO.	Residentials outside Devon. All overseas activities and youth centres own staff delivered adventure activities. High risk activities. Expeditions where there are external providers' staff with local knowledge present and leading major activities who can also be expected to take a significant role in any emergency. Partnership events that include non Plymouth City Council (PCC) organisations.	Form PSOE1 with risk assessment and provider questionnaire
C1	Local procedure determines the timescale but Local Authority endorsement is required at the earliest opportunity and well before making any financial commitment. Final approval from the same sources at least three clear weeks prior to departure	Initial and <u>final</u> approval from the EVC, PYO and Chair of Governors, and Local Authority OEA.	All major events in developing countries where there are unpredictable factors and services and where Local Authority staff carry a high level of responsibility for delivery and contingency.	PSOE1 with outline details. Then resubmitted for final signature

Notes for Educational Visits Coordinators (EVCs), Heads and Governing Bodies

1. Introduction

This guidance replaces all earlier Local Authority guidance on External Visits distributed to schools / youth and community centres. **It is essential that all copies of the earlier guidance are destroyed and replaced with this edition.**

Important note:

In order to ensure that this guidance remains up to date with current best practice, EVCs will be informed directly by the Outdoor Education Adviser of any future additions / amendments to this document. Any changes will be notified on the News section of this policy and guidance. It is the responsibility of the EVC to ensure that attention is drawn to any changes and to restrict the printing of large sections of the policy that may be difficult to find and replace.

For this reason, hard copies would be best kept in loose-leaf file format.

2. Scope of the guidelines

These policies and guidelines apply to any included activity, as described within, for which the Local Authority has a legal duty of care to the participants.

It applies to the following organisations, collectively referred to as schools / centres:

- Local Authority maintained schools / youth and community centres, including schools, youth centres, colleges, residential centres.
- Any units wholly or partly the responsibility of the Local Authority.
- Any activity initiated by, or where the participants are recruited through, any of the above schools / youth centres, for example Duke of Edinburgh Award.
- Any activity organised or led by Local Authority full time staff, part time staff, or volunteers acting on behalf of the Local Authority or where agreed by partnership between the Local Authority and the voluntary sector.

In Voluntary Aided and Foundation Schools, the governing body has the responsibility for Health and Safety including educational visits. The governing body may choose to join the Local Authority in a partnership to follow this document in its entirety OR to retain all responsibility. Written notification of the decision taken by the governing body in this respect should be sent to the Director for Children's Services. The document will still be made available to 'non partnership schools' but will be for advice only.

3. Glossary of terms

- **Young person** – all children, pupils, young people, and youth club members for whom the activities are provided and for whom the Local Authority has a duty of care.
- **Adult volunteer** – all adults who help on a visit with the permission of the Head but who are not employees of the school / centre.
- **Teacher / Youth Worker** – includes teachers, youth workers, higher level teaching assistants, learning support assistants, early years practitioners, peripatetic employees and others who are employed by the school / centre.
- **Visit Leader** – a named person who will plan, prepare and lead the visit.
- **Group Leader** – staff and / or volunteers who will supervise a sub group of the whole party
- **EVC** – the Educational Visit Coordinator who oversees the approval mechanism within the school / centre for all visits. The functions of the EVC are detailed in Section A5. Due to the nature of the role, **EVCs must be an experienced member of staff, with a background in education or youth work, who is capable of influencing the senior management team within the school / centre.** The EVC may be the Head.

- **Head** - all Headteachers, Principals, Directors, Senior Youth Workers, Centre Heads and all others who are in charge of a school / centre or unit.
- **Governor** - this term is used for Governing Bodies, Management Committees, or any group of persons exercising a management function for a Local Authority school / centre.
- **School / Centre** - all schools / centres and functions of the Local Authority listed in paragraph 2 above.

4. **Offsite Educational Visits – scope of the guidance**

The guidance in this website is relevant to any occasion in which young people leave the school / youth centre site for any activity or visit whilst legally in the care of the school / youth centre. It is important that all visits follow an established procedure within the school / youth centre which is managed and maintained and regularly reviewed by the Head / EVC.

It is recognised that whilst the principles of this manual apply to all visits, schools / youth centres should adopt the concept of proportionality of process surrounding each visit. For example, the processes to support a month long foreign expedition should be proportionately different to those for local visits and activities undertaken in 'normal' lesson time or as part of regular, local extra-curricular provision. Termly or annual consent and a generic risk assessment may be appropriate for a range of regular, local visits.

Thinking about a visit

A brief guide / checklist can be found within Form PSOE1 which can be found in the forms section of the attachments section.

Before the visit

The planning process

Depending on the nature of the visit this process will take place over weeks, months or even years. The quality of the process will not only determine safety but also the quality of the experience for young people. It is not meant to be arduous but must be thorough.

Speak to your External Visit Coordinator (EVC) at an early stage about your outline plan. This will give you immediate feedback on your ideas and will ensure you do not expend energy on a visit that may not be approved.

What are the aims of the visit?

A visit with clear aims and objectives appropriate for the age and ability of the group is more likely to be a high quality, safe experience for all involved. There should be clear links between the activities on a visit and the normal work of the school / centre. This will help to ensure that the visit is of benefit to both young people and staff and that the outcomes of the visit are successful.

Seeking advice

The EVC is a good starting point for advice and information. Within the school / youth centre there may be other staff who have run similar visits who are able to offer practical advice.

The Local Authority Outdoor Education Adviser can give advice and guidance on Outdoor Education and other issues relating to visits.

Visit approval / notification

Your school / youth centre will have a process to be found in site specific guidance, for the approval of off-site visits. This is also likely to be led by the EVC who has specific responsibility to approve and oversee visits. They may give approval directly or may refer to the Head / Governing Body for approval. Local Authority notification is required for Category C and C1. Timescales for EVC / Local Authority approval must be met in order to provide essential protection for anyone who organises or assists with managing a trip.

Transport

As part of the planning process you will need to decide how you are going to transport your group of young people. In particular you should consider how you will manage the group during transport and arrival. Insurance and licence requirements should be checked for any staff or volunteers driving young people.

Finance

Finance is an important aspect to any visit and should be planned for accordingly. Issues to consider include delivery and staffing of the programme, transport, entrance fees, clothing / equipment hire, food and for overnights, appropriate accommodation.

Insurance

Most local authorities arrange insurance cover for schools and centres. You will need to check with your EVC / Head whether this is the case and, if so, what is covered by the policy. Parents should be informed about what is covered by the Local Authority policy and advised to take out additional insurance if this is deemed necessary.

Risk management

Risk management is not solely about completing a written risk assessment form. Whilst this is an important element in the planning stage (and creates a valuable record of this process), it is the ability of leaders to monitor changing conditions during the visit and react appropriately that is the main determinant of safety on a visit. This ability to manage ongoing risks is a key leader competence that is best developed through a staged 'apprenticeship' where staff initially assist on visits with one or more experienced colleagues prior to leading their own trips. Competence in ongoing risk management may also be developed through appropriate training and leadership courses. Your Outdoor Education Adviser can advise on relevant courses. Section B contains further information about risk management along with advice on risk assessment.

Talking to young people and parents / carers

Young people and parents / carers need to be given information about the visit and you will need to collect information such as dietary and medical requirements. Behavioural and other special needs should also be investigated to allow appropriate support to be provided on the visit.

Parents / carers need to be provided with full 'warts and all' information about the visit so that they can give fully informed consent for their child to take part in all planned activities (including any contingency plan activities). They will also need to be informed about the clothing and equipment required, financial details (including payment dates), insurance cover and emergency procedures in case of early / late return or accident.

Involving young people in the planning process

It is good practice to involve young people in the planning process of a visit. This can help to educate them in aspects of risk management and makes it more likely that they will be aware of hazards and risks and ways to deal with them safely.

During the visit

Staffing

When choosing staff for a visit, their competence to manage a group effectively in the planned activity / location along with their ability to carry out ongoing risk management are of primary importance.

Visit and group leaders who accept responsibility for young people on a visit have a common law duty of care towards those in their care. The legal section explains this more fully and how staff are protected against cases of alleged negligence.

Each visit should have a party leader who plans and prepares the visit. They will also be responsible for briefing the group leaders and defining roles and responsibilities.

Staff acting as Group Leaders should be competent to undertake tasks which have been allotted to them by the visit leader. Working with young people is an ongoing learning process, not an exact science. To support the learning process the Local Authority offers a Group Leaders Training Course delivered by the Outdoor Education Adviser.

Ratio's Adults to Children and Young People on Offsite Activities

The number of supervising adults should be assessed as a part of the risk management plans for the trip. In this way there should be enough adults present to match the needs that arise from the different circumstance that are predicted for the activity. There are however nationally regarded minimums that act as a bottom line and for which a very good argument would have to be made to justify having fewer supervisors. (Set out below)

Planning for supervision will then take account of:

- The demands of the programme, remoteness, split site, emergency contingencies, modes of travel
- The nature, age and demands of the participants
- The experience of the supervising team

Schools are recommended to make clear their guidance on ratios for specific age ranges in their site specific guidance for their particular children.

UK general guidance 1 : 15 children
Overseas 1 adult :10 children

The programme

Deliver the programme according to the plans made. However, you may need to make changes to your original plans and update your risk assessment accordingly. You should be prepared to make adjustments. Always think about it as a dynamic process.

If things do not go to plan A

Your planning and risk assessments should include contingency plans (plan B) to cope with weather changes, activities not possible, emergencies or other 'spanners in the works'. Do not hesitate to move to your plan B if conditions require it. If you have to change things during the day and cannot opt for your Plan B, use this ongoing risk management experience to inform review of the visit and risk assessments on return to base. If possible, call your base to discuss your alternative plans. Except in emergency, this should not involve activities for which parental approval has not been obtained.

Emergency procedures

If there is an accident or incident you will need to initiate your emergency procedures. Make sure you have established 24 hour emergency procedures with the EVC / Head prior to the trip. Record accurately any incidents to help with incident reporting on return to base.

After the visit

Thank those involved in leading / organising the visit.

Review learning with young people and staff involved. This will reinforce positive outcomes from the visit.

Consider a parents evening / assembly or posting reports on the school website or any other presentation to celebrate the experience and learning which took place on the visit. The involvement of young people in this is highly recommended.

Review the risk assessment and other planning arrangements in the light of your experience on the visit – this will help to make future visits more successful. Provide a report / evaluation of the visit to the EVC as required.

Keep all records on file for future reference. Use your data protection guidance to determine the length of time to store information.

The EVC in action – an overview of the role

Due to the nature of the role, EVCs are experienced members of staff, with a background in education or youth work, capable of influencing the senior management team within the school / centre. The EVC is the routine contact for dialogue with the Local Authority Outdoor Education Adviser. Unless explicitly delegated to an EVC, these responsibilities would rest with the Head.

The EVC performs a number of key tasks:

- Approve 'normal' visits within the school / centre based system
- Notify the Local Authority of any visits in Category C and C1
- Work from the outset with the Local Authority to approve activities in Category C1
- Assessing the competency of staff and volunteers working on external visits, ensuring appropriate checks are in place
- Maintain records of all visits, staff records, incident and accident reports
- Liaise with staff, offering advice, support and knowledge regarding external visits
- Liaise with the Head and Governing Body as required.

Important note: functions listed above which are administrative in nature may be delegated to an appropriate member of School / Centre staff. The responsibility to ensure that these functions have been carried out would remain with the EVC.

Approving visits

Schools / centres should ensure that appropriate policies, approval mechanisms and other procedures are in place for educational visits and are being followed by members of staff. The EVC should provide advice to governing bodies / management groups in developing these systems. This manual is a useful starting point for this process.

The school / centre policy should ensure that Visit Leaders seek early outline approval of their visit by the EVC, before any financial commitment is made. Adequate notice allows all checking procedures to take place, including Local Authority notification where required.

These policies should be proportionate to the type of visit being planned. For regular local visits the school / centre may wish to adopt a termly or annual system of approval. Specific visit approval should be required for one-off visits or for visits involving travel further afield, overnight stays or any of the activities / venues for which Local Authority notification is required.

Checking process

Aims of visit

These should be clearly identified at an early stage and be relevant to the young people and to the school / centre. As well as contributing to educational outcomes they will also affect safety.

Staffing

Staff numbers and competence should be appropriate to the size, capability and age of the group and the nature of the activity.

Finance

The financial implications of a visit require detailed consideration at an early stage and it is important to maintain records that can be verified as they may be the subject of audit.

Consent

Parents / carers must be given full details of the intended programme (including any contingency plans) prior to giving fully informed written consent. This consent must be obtained before the visit. Young people should never be engaged in activities to which parents / carers have not given their consent.

Risk management

Managing risk is not about risk assessments alone, although these form an essential part of the planning process. Of crucial importance is the competence of visit and group leaders to manage their group and to carry out ongoing risk management as conditions change during the visit. Location, activity, young people, staff, travel arrangements and other variables can all add risks to the overall visit. These risks can be reduced to an acceptable level by good planning and preparation, selection of competent leaders and well prepared young people.

The EVC has a key role in their school / centre to encourage a robust, effective risk management system which addresses the issues raised above.

Emergency procedures

Emergency contacts for the school / centre plus emergency contacts for all party members must be carried on all educational visits and visit leaders should understand the school / centre emergency procedures. For all visits the telephone contact should be accessible at all times.

Competency of staff

Staff training and development

A programme of relevant staff training should be in place for Visit and Group Leaders for example, Group Leader training, first aid and for specific areas where required for example, Duke of Edinburgh Award expeditions, outdoor activities and visits to more remote locations.

Less experienced staff should serve an 'apprenticeship', gaining experience working alongside more experienced colleagues until they have gained sufficient experience to competently lead visits themselves. They can also be directed towards entry level training

courses such as the Coast and Countryside Leader or the Outdoor Education Advisers panel (OEAP) Group Leader training

Volunteers

Volunteers such as parents / governors can make a valuable contribution to the success of an educational visit. It is important that volunteers are competent to carry out allotted tasks and understand their areas of responsibility.

Please check the Local Authority / school / centre policy with regard to volunteers and CRB checks. Any volunteer working on a residential visit should be CRB checked.

Annual staff meeting

It is advisable for the EVC to hold an annual meeting to look at the issues of the school / youth centre educational visits programme. Included in this will be a review of visit evaluations, risk assessments, incidents, accidents and emergency procedures.

Young people

Young people should wherever possible take an active role in selecting activities, helping to plan and organise them and to a certain extent in the risk management.

Local Authority child protection procedures must be considered and applied as necessary.

Educational visits provided by the school / youth centre should reflect the inclusion policy. Special arrangements may have to be made for young people with specific special needs and these may include special equipment / staffing / programme implications.

It is important that visit leaders are aware of any special medical details or conditions at the time of the visit. Dietary requirements are an important part of the planning process for residential visits.

Support

The Outdoor Education Adviser will be able to provide support to the EVC, particularly regarding activities and environments for which Local Authority approval is required.

Senior management should set aside sufficient time and resources to support the important work of planning, organising and gaining approval for all educational visits.

Access to emergency procedures

Leaders and accompanying adults should be familiar with the school / centre emergency procedures. These procedures should be reviewed annually so that they can be kept accurate and up to date. The EVC should ensure that the senior management team have access to the Local Authority critical incident plan.

Telephone contact details should be collected for all parents / guardians of young people on the visit and should be available to the visit leader whilst the visit is underway. It is good practice to set up a parental telephone network to speed up communication in the event of an incident for certain categories of visit.

Feedback

All incidents and accidents on educational visits should be recorded and reviewed on a regular basis. The school / youth centre should adhere to the Local Authority policy on incident / accident reporting.

Evaluations of external visits by young people and staff should be encouraged. They promote further visits and provide opportunities for updating and improvement. Accounts of young peoples experience with selected photographs would make a significant contribution to schools and youth centre websites. There should be an annual report on the impact and outcomes of all visits to the governing body / management committee.