



MERCHANT
TAYLORS'
SCHOOLS

For Boys and Girls
aged 4 to 18 years

Management of Educational Visits Policy

Management of Educational Visits

Author: J. Green

Last Amended: December 2017

Review: December 2018

Policy for the Management of Educational Visits

(Please click on blue hyperlink to access further information)

1. Provision of Employer Guidance

Merchant Taylors' Schools have adopted the "**National Guidance**" as "**Merchant Taylors' Schools Employer Guidance**".

This Educational visits guidance can be found on the Outdoor Education Advisers Panel (OEAP) web site: www.oeapng.info

The DfE Guidance for Health and Safety in Schools can be found at: [DfE website](#)

It is a legal expectation that Merchant Taylors' Schools employees **must** work within the requirements their employer's guidance.

Merchant Taylors' Schools employees should also follow National Guidance (NG) recommendations. Where there is any variance of policy between the national guidance and Merchant Taylors' Schools' policy the Merchant Taylors' Schools policy requirements take precedence over any guidance.

Where a Merchant Taylors' Schools employee commissions an Educational Visit or a Learning Outside the Classroom (LOtC) activity, they must ensure that such commissioned agent has either:

1. adopted Merchant Taylors' Schools or OEAP National Guidance, **or**
2. has systems and procedures in place where the standards are not less than those required by OEAP National Guidance.

2. Scope and Remit

The NG document 1c [Basic Essentials - status and remit](#) clarifies the range of employees whose work requires them to use the guidance. In summary, it applies to employees whose work involves any one of the following:

- direct supervision of young people undertaking experiences beyond the boundary of their normal operational base
- direct supervision of young people undertaking experiences that fall within the remit of Educational Visits and Learning Outside the Classroom;
- facilitating experiences for young people undertaking experiences beyond the boundary of their normal operational base
- deploying staff who will supervise or facilitate experiences of or for young people undertaking experiences beyond the boundary of their normal operational base.

This applies regardless of whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods.

For a more expansive explanation of legal expectations, all users of the guidance are strongly recommended to read the NG document 3.2a [Underpinning Legal Framework](#)

3. Ensuring Understanding of Basic Requirements

As an employer, Merchant Taylors' Schools is required to ensure that its employees are provided with

- appropriate guidance relating to Educational Visits or LOtC activity;
- employer-led training courses to support the guidance to ensure that it is understood;
- suitable systems and processes to ensure that those trained are kept updated;
- access to advice, support and further training from an appointed Adviser that has proven expertise and professional understanding of the guidance, the training and expectations set by current good practice.

The appropriate guidance for the management of Educational Visits and LOtC at Merchant Taylors' Schools is the Employer Guidance web site [OEAPNG](#)

The relevant training courses for Merchant Taylors' Schools' are:

1. Educational Visit Coordinator (EVC) Training - Merchant Taylors' Schools is required to have a current, trained EVC in post for all the Senior and Junior/Infant schools. The Heads of Sport and Activities also act as Visit Coordinators for their areas of responsibility.
2. Merchant Taylors' Schools Educational Visit Coordinator (EVC) Revalidation - all Merchant Taylors' Schools EVC's are required to undertake a formal revalidation from time to time (3-5 years suggested)
3. Visit Leader Training – all visit leaders have training and support from the EVC and an 'apprenticeship' system is operated with experienced staff mentoring staff with less trip experience. All new staff have 'visit leader training' as part of their induction programme.

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should consult the EVC.

4. Approval and Notification of Activities and Visits

Employer guidance **must** provide clarity on issues where responsibilities and functions are delegated. This is particularly critical in establishing requirements regarding formal notification and formal approval of activities.

Approval

All visits are approved at Head Level. The approval process and procedures for day, adventurous and residential visits are set out in detail on the Schools' intranet in the **Educational Visits folder (in Staff Shared, Administration)**. This policy and all other shared resources (consent forms, emergency cards, trip letters etc) are also available.

Sport fixtures and trips as part of the weekday Activities programme are approved by the Directors of Sport and Activities.

The competence of the Visit Leader is the key component in ensuring the safety of the participants. Assessment, training and support of Visit Leaders is a priority of the EVC.

All School trips have a named leader who must be a serving member of staff at Merchant Taylors' Schools. The approval paperwork is to be completed by the Visit Leader.

5. Risk Assessment (or Risk Management)

Refer to NG document: 4.3c [Risk Management](#)

As an employer, Merchant Taylors' Schools has a legal duty to ensure that risks are managed - requiring them to be reduced to an "acceptable" or "tolerable" level - and not to eliminate risks, as would be a reasonable expectation when risk assessing a piece of machinery, work shop or manufacturing process. This requires that proportional (suitable and sufficient) risk management systems are in place, requiring

Merchant Taylors' Schools to provide such support, training and resources to its employees as is necessary to implement this policy.

The risk management of an activity should be informed by the benefits to be gained from participating. Merchant Taylors' Schools promotes a "Risk-Benefit Assessment" approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. This appreciation of the benefits to be gained through participating provides objectivity to a decision that any residual risk (i.e. the risk remaining after control measures have been put in place) is "acceptable". HSE endorse this approach through their [Principles of Sensible Risk Management](#) 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.

There is no legal requirement to produce a risk assessment in a particular format; but there is a legal requirement for the process to be recorded and for suitable and sufficient control measures to be identified for any significant risks i.e. those that may cause serious harm to an individual, or harm several people. However, Merchant Taylors' Schools have adopted a format that involves a 5x5 matrix. **The process and procedures for carrying out a risk assessment are set out in detail on the Schools intranet in the Risk Assessment folder (in Staff Shared, Administration).**

Generic Merchant Taylors' Schools risk assessments exist for a wide range of trips and components of trips – accommodation, transport, theatre trips etc. These are available in the folder mentioned above.

6. Emergency Planning and Critical Incident Support

A critical incident is an incident where any member of a group undertaking an off-site activity has:

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

As an employer, Merchant Taylors' Schools is committed to providing emergency planning procedures to support establishments in the event of a critical incident.

Refer to NG document: 4.1a [Critical Incident Management for Visits](#) and the **Merchant Taylors' Schools Critical Incident Policy**.

All Merchant Taylors' Schools' trip leaders are provided with a Critical Incident Card detailing the emergency procedures and emergency contact details. All residential trips have a nominated emergency contact who has trip details and is 'on call' at all times.

7. Monitoring

As an employer, Merchant Taylors' Schools ensures that there is monitoring of the Educational Visits and LOtC activities undertaken by its staff. Such monitoring should be in keeping with the recommendations of Employer Guidance. There is a clear expectation that the monitoring function is a delegated task put in place by the EVC and principally carried out by experienced staff acting as mentors/advisors for colleagues.

8. Assessment of Leader Competence

Employer Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of the Merchant Taylors' Schools Policy that all leaders and assistants have been assessed as competent to undertake such responsibilities as they have been assigned in line with national guidance.

To be 'competent' also includes completing specific Merchant Taylors' Schools Minibus driving qualification.

Adventurous Activities – see appendix A for list

Merchant Taylors' Schools acknowledges the immense educational benefits that adventurous activities can potentially bring to young people, and fully supports and encourages adventurous activities that are correctly planned, managed, and conducted.

Competences to lead outdoor activities should be demonstrated by holding the relevant National Governing Body (NGB) award where it exists. Where there are queries regarding the competencies/experience required the EVC will contact outdoor professionals for advice. All centres and providers used by the school for the provision of adventure activities will hold a current AALA licence.

Other Areas

Staff competence in first aid, minibus driving, life saving etc may also be needed, depending on the activity. Volunteers will also require induction training prior to a specific visit. Training requirements in these areas should be identified as part of the risk assessment process.

Refer to NG document: 3.2d/4.4a [Assessment of Competence](#)

9. Role-specific Requirements and Recommendations

Employer Guidance sets out clear and detailed responsibilities and functions of specific roles within Merchant Taylors' Schools. Refer to individual [NG documents](#):

- 3.4f **Member of Board of Governors or Management Board**
- 3.4g **Head teacher**
- 3.4j **EVC**
- 3.4k **Visit or Activity Leader** (this document should be consulted by visit organiser)
- 3.4l **Assistant Visit Leader**
- 3.4m **Adult Helper**
- 3.4n **Parents**
- 3.4o **Volunteers**

10. Charges for Off-site Activities and Visits

Merchant Taylors' Schools has the following protocol for charging for visits:

If the trip is compulsory in School time and required for the scheme of work then it is usual that the School covers the cost or provides a significant subsidy.

If the trip is optional or out of curriculum time then the cost of the trip is passed on to parents.

Each proposal is judged on its merits by the Head.

11. Vetting and Barring Service Checks - see also Merchant Taylors' Schools [Child Protection Policy](#) in Staff Shared, Administration.

Merchant Taylors' Schools employees who work *frequently or intensively* with, or have *regular access to* young people or vulnerable adults, must undergo a Barring Service check as part of their recruitment process.

For the purposes of this guidance:

- *frequently* is defined as "once a week or more";
- *intensively* is defined as 4 days or more in a month or overnight.

However, it must be clearly understood that a barring service check (or other vetting procedure) in itself, is no guarantee as to the suitability of an adult to work with any given group of young or vulnerable people.

The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be on the understanding that an overview based on a common sense risk-benefit assessment process has been considered.

Refer to NG document 3.2g [Vetting and disclosure and Barring Service Checks](#)

12. Requirement to Ensure Effective Supervision

In general terms, the Law does not prescribe activity-specific staffing ratios; but it does require that the level of supervision and group management is "effective".

Effective supervision should be determined by proper consideration of:

- Staff Competence
- Activity - nature and location of the activity (including the type of activity, duration, skill levels involved)
- Group - age (including the developmental age) of the group; ability of the group (including special learning needs, behavioural, medical and vulnerability characteristics);
- Environment - nature and location of the activity (including the type of activity, duration, skill levels involved, as well as the time of year and prevailing conditions,
- Distance away from the base

However, as an exception to the above, Ofsted and DfE guidance prescribe ratios for Early Years.

Refer to NG document: 4.3b [Ratios and Effective Supervision](#)

Refer to NG document: 4.2a [Group Management and Supervision](#)

This National Guidance suggests the following ratios:

School years 1 to 3: 1:6

School years 4 to 6: 1:10/15

School years 7 onwards: 1:15/20

13. Preliminary Visits and Provider Assurances

All visits should be thoroughly researched to establish the suitability of the venue and to check that facilities and third party provision will meet group expectations. Such information gathering is essential in assessing the requirements for effective supervision of young people. It is also a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. The EVC will advise on this in each specific case. A pre-visit is usually required for visits where there is a high complexity factor and the visit has not happened previously, or when the visit is adventurous and led by Merchant Taylors' Schools' staff, a new DofE day walk for example.

Residentials, visits abroad, exchange visits, adventure led by school staff all have aspects of complexity. If the visit is led and managed by a provider, then a variety of approaches can reduce the need to pre visit.

It is good practice for Visit Leaders to take full advantage of the nationally accredited, provider assurance schemes that are now available, thus reducing bureaucracy.

Examples of such schemes include:

The LOTC Quality Badge

AALA licensing

Adventuremark

School travel forum

NGB centre approval schemes

Merchant Taylors' Schools takes the view that where a provider holds such one of the above accreditations, there should be no need to seek further assurances.

Refer to NG document: 4.4g&h [Preliminary Visits and Provider Assurances](#)

14. Insurance for Off-site Activities and Visits

Employer's Liability Insurance is a statutory requirement and Merchant Taylors' Schools have arranged a policy that will respond and, if appropriate, indemnify against all claims for compensation for bodily injury suffered by any person with a contract of employment. This cover also extends to those persons who are acting in an authorised voluntary capacity as assistant supervisors. Merchant Taylors' Schools also holds Public Liability insurance, which will indemnify the school against all claims for compensation for bodily injury from persons not in its employ, as well as for the accidental loss of, or damage caused to, third party property where Merchant Taylors' Schools are deemed to have been negligent. Employees (as agents of the employer) are indemnified against all such claims, as are voluntary helpers acting under the direction of the employer's staff if they commit a negligent act. The indemnity includes activities such as off-site activities and outside visits organised by all departments for which Merchant Taylors' Schools may be considered responsible.

The Schools also holds comprehensive travel insurance for staff and pupils. Details of the Policy are available to trip leaders and can be sent to parents as part of pre-trip administration. If in doubt consult the Administration department as they will be able to advise.

Refer to NG document: 4.4c [Insurance](#)

15. Inclusion

Every effort should be made to ensure that outdoor learning activities and visits are available and accessible to all, irrespective of special educational or medical needs, ethnic origin, gender or religion. If a visit needs to cater for young people with special needs, every *reasonable* effort should be made to find a venue that is both suitable and accessible and that enables the whole group to participate fully and be actively involved.

Establishments should take all *reasonably practicable* measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and reflected in establishment policy, thus ensuring an aspiration towards:

- an entitlement to participate
- accessibility through direct or realistic adaptation or modification
- integration through participation with peers

Employers, Heads/Managers, Curriculum Planners, EVCs and Visit Leaders should be aware of the extent to which Inclusion is or is not a Legal issue.

Under the Disability Discrimination Act 1995, it is unlawful to:

- treat a disabled young person less favourably;
- fail to take reasonable steps to ensure that disabled persons are not placed at a substantial disadvantage without justification.

Refer to NG document: 3.2e [Inclusion](#)

16. Good practice requirements

To be deemed competent, a Merchant Taylors' Schools Visit/Activity Leader, or Assistant Leader must be able to demonstrate *the ability to operate to the current standards of recognised good practice for that role.*

All staff and helpers must be competent to carry out their defined roles and responsibilities.

Employer Guidance sets a clear standard to which Merchant Taylors' Schools leaders must work. The guidance states:

"a competent Visit /Activity Leader (or an Assistant Leader where they may take sole responsibility for a sub-group) requires:

- *Knowledge and understanding of their employer's guidance supported by establishment-led training.*
- *Knowledge and understanding of establishment procedures supported by a structured induction process specified by the establishment.*
- *Knowledge and understanding of the staff, the activity, the group and the venue.*
- *Appropriate experience*
- *In some circumstances (e.g. first aid, adventurous activities) a formally accredited qualification."*

Staff participating in off-site activities and visits must be aware of the extent of their duty of care and should only be given such responsibilities as are in keeping with the above guidance. It is particularly important that careful consideration of competence issues is applied to both newly qualified and newly appointed staff. The Schools should view the original documents and certificates when verifying leader's qualifications, and not rely on photocopies.

Where a Volunteer Helper is a parent (or otherwise in a close relationship to of a young person taking part in the visit) they should be made aware of the potential for their relationship to compromise the Visit Leader's plans for group management. The Visit Leader should directly address this issue as part of the Risk-Benefit assessment.

Refer to NG document: 4.3a [Good Practice Basics](#)

17. Medical

Medical details for students and staff taking part in trips are collected by the trip leader either through a specific medical consent form for residential trips, or by reference to the school database for day visits. The School nurse is also consulted for residential trips. Any specific student medical issues are to be included in the trip risk management planning.

Staff should be aware of particular students who have special medical requirements and the spare medication that needs taking with them on the visit.

18. Transport

Careful thought must be given to planning transport to support off-site activities and visits. Statistics demonstrate that it is much more dangerous to travel to an activity than to engage in it. All national and local regulatory requirements **must** be followed.

Minibuses

It is a requirement of Merchant Taylors' Schools Policy that all staff must be aged 21 and over, category D1 entitlement on their driving licence and have completed Merchant Taylors' Schools' training to drive a vehicle over 3.5 tonnes and up to 16 passengers. Without a D1 entitlement, staff over 21 may drive a vehicle up to 3.5 tonnes and 16 passengers once they have completed their minibus training provided through school.

The level of supervision necessary should be considered as part of the risk management process when planning the journey, giving proper consideration to issues of driver-distraction when considering what supervision is required for the specific group of passengers being transported in a minibus.

Also see NG document: 4.5b [Transport in Minibuses](#)

The Visit Leader should ensure that coaches and buses are hired from a Merchant Taylors' Schools approved company.

Transporting young people in private cars requires careful consideration. Staff cars should only be used in special circumstances or to transport students in 'unplanned' or 'emergency' situations. For example, Journeys to hospital, to prevent students being stranded at Hall Road etc. In any case though, the car **must have** class 1 business use as an endorsement on their insurance certificate.

Refer NG document: 4.5a [Transport: General Considerations](#)

19. Planning

Planning should reflect the consideration of Legal and good practice requirements, ensuring:

- The plan is based on Merchant Taylors' Schools procedures and employer guidance.
- All staff (including any adult volunteer helpers) and the young people to be involved, have a clear understanding of their roles and responsibilities, including their role in the risk management process.
- Those in a position of parental authority have been fully informed and, where appropriate, formal consents have been obtained.
- Proportionate assurances have been obtained from any providers (making full use of national schemes that accredit that assurances have already been obtained by credible inspection regimes).
- Designated emergency contact(s) have been identified that will work on a 24/7 basis where required.
- All details of the activity provision are accessible to the emergency contact throughout the period of the activity.

It is strongly recommended that at a very early stage of the planning process, the provisional staffing team carry out a brain storming exercise in order to identify the benefits and learning outcomes that the activity (or range of activities) might achieve. If the outcomes are to be evaluated with any rigor, then it will be essential that these outcomes are prioritised, and appropriately targeted. A record of these outcomes will help keep the plan focussed and also be a vital part of the risk management process in providing some objectivity in a "Risk Benefit Analysis". Once the targeted outcomes have been recorded, it will then be possible to identify appropriate on-going review and evaluation strategies, including indicators.

This supports the move towards developing activity-specific policies at establishment level for regular or routine activities. Such policies should be robust and equate to "*operational guidance*" that makes it clear

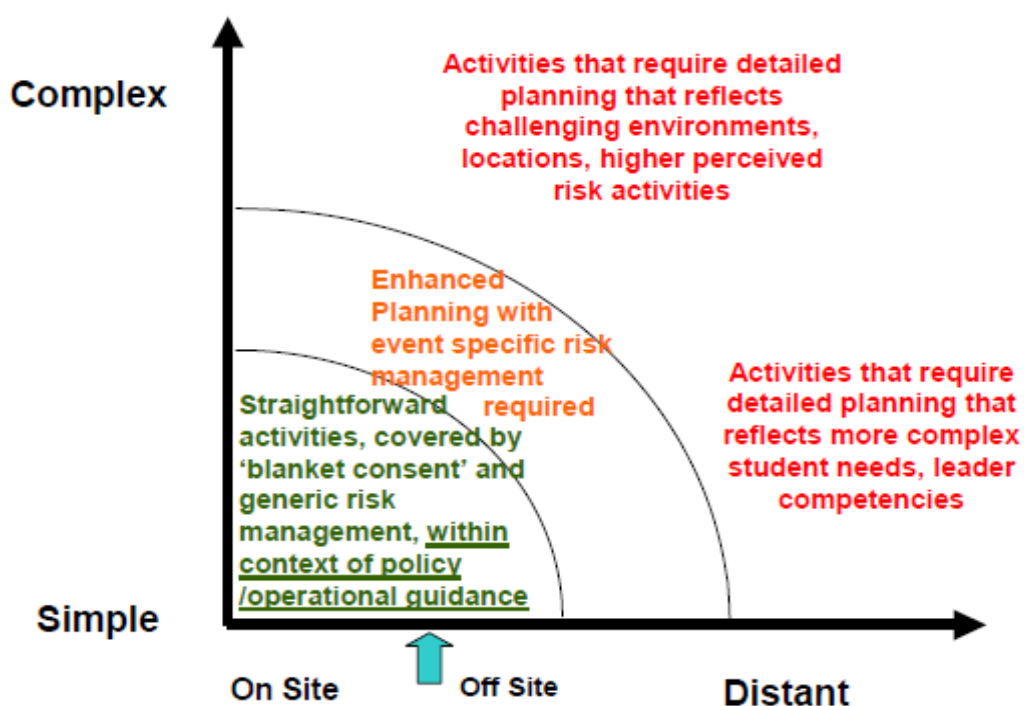
how the activity should be planned and delivered, meeting all necessary recommendations and requirements, as well as assuring educational quality.

The degree of complexity of a particular plan or policy (along with its supporting procedures) will need to reflect the nature and complexity of several variables that can impact on any given activity.

These variables can be remembered as:

“SAGED” as explained below.

- Staffing requirements – trained? experienced? competent? ratios?
- Activity characteristics – specialist? insurance issues? licensable?
- Group characteristics – prior experience? ability? behaviour? special and medical needs?
- Environmental conditions – like last time? impact of weather? water levels?
- Distance from support mechanisms in place at the home base – transport? residential?



Example Merchant Taylors’ Schools’ trips;

Straightforward – Hall Road, local theatre, local museum, etc...

Enhanced Planning – residential trip, Geography fieldwork, etc...

Challenging Environments – DofE Gold level, skiing, etc...

20. Consent

Parents give a general consent to all non-residential or adventurous Educational Visits on entering Merchant Taylors’ Schools by signing the ‘Terms and Conditions’. This consent applies to the following:

1 Educational Visits: A variety of school trips will be provided for your child while a pupil here. The cost of some school trips will be charged as an extra and may be added to the bill or paid separately. Parents' prior consent will be sought for a trip incurring additional costs.

2 Transport: Use of public transport or school transport driven in a responsible manner by an adult who is suitably qualified and insured.

3 All Educational Visits require written communication with parents as specific information needs to be given on timings, equipment etc. Example letters are available on the Merchant Taylors' Schools' intranet.

All trips that involve additional costs and require payment by parents, all residential trips and all adventurous activities **must have** specific parental consent. **Example letters and the generic consent form are available on the Merchant Taylors' Schools intranet (in the Educational Visits folder, in Staff Shared, Administration).**

Pupils and parents will also be expected to sign an Educational Visits Behaviour Contract (form EVBC) for major residential trips. This issue will be discussed at the pre-trip meeting with the Head and EVC to deem whether this is necessary.

21. The Value and Evaluation of LOtC

The Ofsted report **Learning Outside the Classroom - How Far Should You Go?** in October 2008: makes statements in the strongest terms to support the value of LOtC, including the fact that it raises achievement.

Refer to NG document: 2.4a [Ofsted and LOtC Summary](#)

However, it also highlights the finding that *even where LOtC is highly valued and provided to a high standard, it is rarely evaluated with sufficient rigour* – i.e. in the way that classroom learning is evaluated – and a methodology to address this is provided within the National Guidance document: 5.1c [Rigorous Evaluation of LOtC: Meeting Ofsted Expectations](#)

Appendix A

Adventure Activities

Below is a list of 'Adventure Activities' as agreed by Local Authority outdoor education advisors.

Before our students take part in any of these we need to be sure that the relevant National Governing Body qualifications are held by the person/organisation running the activity or a technical advisor has provided a statement of competence.

- All activities in 'open country' such as D of E Expeditions.
- Swimming (all forms, excluding publicly life guarded pools)
- Camping where participants/leaders erect tents and/or self cater.
- Canoeing / kayaking
- Sailing / windsurfing / kite surfing
- Rafting or improvised rafting
- Use of powered safety/rescue craft
- All other forms of boating (excluding commercial transport)
- Water skiing
- Paintball (including 'Laser Quest')
- Snorkel and aqualung activities
- Hill walking and Mountaineering
- Mountain biking
- Rock climbing (including indoor climbing walls)
- Abseiling
- River/gorge walking or scrambling
- Coastering/coastal scrambling/sea level traversing
- Underground exploration (Except designated 'Show' caves)
- Shooting and archery
- Skiing, snowboarding, and related activities (including dry slope)
- Air activities (excluding commercial flights)
- Horse riding
- Motor sport – all forms
- High level ropes courses
- Other activities (e.g. initiative exercises) involving skills/risks inherent in any of the above

The Governing body has decided that it is **not appropriate** for the following activities to be undertaken by pupils at Merchant Taylors' Schools':

- White water rafting
- Off piste skiing
- Bungee jumping
- Any other extreme sports

NB. It must be noted that certain adventurous activities will not be covered by the Schools' insurance. If in any doubt consult the EVC or DFO.