



# Policy, Procedures and Guidance for Educational Visits (formerly Offsite Visits)

Produced by the CEO, Delegated Services, as Competent Person for the Establishment and Claire Leheup, DS Partner and Advisor for Outdoor Learning and Educational Visits.



Issue date: January 2025

## **FOREWORD**

This document (Document 1 of 1) has been prepared to provide policy, procedure and guidance on educational visits and trips. It flows from the 'Organisation and Arrangements' section of our main Health, Safety & Wellbeing Policy.

## **AUTHORITY FOR ISSUE**

This document is issued under the guidance of the CEO of Delegated Services. This document is our partnership's intellectual property and must not be shared, copied, relayed or otherwise transmitted by any means in any part or as a whole, without prior agreement and written permission.

## **REVISION**

The environment for this potentially higher risk but essential area of activity is ever changing, as is learning from cases arising in the courts. Accordingly, as part of the DS service, this will be actively monitored and where necessary this document will be reviewed and if necessary, replaced. DS customers will be notified of this as part of their agreement automatically.

## **Contents**

Introduction	3
Policy	3
Procedures and Guidance	5
Appendix 1	15

## **Introduction**

The Department for Education's (DfE) has updated its Guidance on Health and safety on educational visits. <https://www.gov.uk/government/publications/health-and-safety-on-educational-visits/health-and-safety-on-educational-visits> The guidance, which links to Outdoor Education Advisers' Panel National Guidance, also endorses the Council for Learning Outside the Classroom's [LOtC Quality Badge](#), the national accreditation which ensures providers have the appropriate safety standards and liability insurance in place.

The guidance clarifies how health and safety law applies to educational visits and is designed to reassure establishments that **where sensible and proportionate precautions are taken in planning and running visits and trips, then staff should not fear prosecution** by the HSE. Organisations are encouraged to strike the right balance between protecting children and young people from risk and ensuring that they can learn from the stimulating challenges and valuable experiences that educational visits provide. The statement also encourages employers to remove any wasteful bureaucracy in organising visits and activities.

Ofsted have made clear that they consider this area of activity, amongst others specifically named, to be essential elements of an overall successful **safeguarding approach** to be encouraged and dealt with on a proportional basis.

The guidance is welcomed by all involved with outdoor learning, especially the call for a more sensible and proportionate approach to health and safety and the reduction in red tape.

## **Policy**

1. We, Bristol City Council and St John's C of E Primary School, have formally adopted the employers' policy and guidance produced by the Outdoor Education Advisers panel and use it as part of our own policy and guidance approach. This guidance can be found at <http://oeapng.info/>
2. We require all those who are working with children and young people, directly for us or on our behalf, to comply with the content of this policy and guidance.
3. We will also take account of and reference:
  - Any organisational policies which may apply, e.g., the overall Safeguarding approach, our 3Cs Policy covering critical incidents, First Aid/Medication/Bereavement Policy, Use of Transport Policy, Charging Policy etc.
  - Association of Physical Education -afPE

- National Governing Body guidelines covering sports and outdoor activities and comply with the standard set, and other sources of good practice.

Our competent person's critical incident support sheet is included in an appendix to this document. It will be laminated and taken on all visits/trips. Staff will be trained in its use.

4. Educational Visits Coordinator (EVC)

We will appoint our own EVC and ensure they are trained and accredited by a competent specialist, then refreshed on a regular basis, noting that a formal revalidation is necessary every three years.

5. Visit / Deputy Visit leader

We will appoint Visit leaders and Deputies and ensure they are trained and accredited by a competent specialist, then refreshed on a regular basis, noting that a formal revalidation is necessary every three years. This person may cascade their training to untrained colleagues who also carry out the role.

6. Early Years

Our practitioners working with children 0-5 years will also comply with applicable content in the Early Years Foundation Stage Framework; click [here](#) to access it.

7. Provider Assurances

We will source accredited and competent providers wherever possible to enhance our provision and take full advantage of nationally accredited, provider assurance schemes available.

Examples include:

- The Council for Learning Outside the Classroom Quality Badge
- AALS licensing
- Adventuremark
- Association of Heads of Outdoor Education Centres Gold Badge, and
- National Governing Body qualifications (applicable where the provision is a single, specialist activity).

We recognise compliance with the standards is essential and not to do so would compromise the support available from Delegated Services.

8. External Provider check

We will comply with notification and consent procedures and timescales requested by our competent persons and include in this commitment any DofE activity involving outdoor learning.

9. Minibus drivers

We will use the latest up to date guidance for the driving of minibuses, by accessing the OEAP National Guidance 4-5b Transport-Minibuses <http://oeapng.info/> and ensure that the driver(s) have undertaken a Minibus Driver Awareness Scheme course (MiDAS), or equivalent.

## **Procedures and Guidance**

10. External Providers

These are third parties contracted to provide instruction or coaching for activities, residential accommodation, travel packages, or overseas expeditions. All external providers must have a clear contract with the establishment and be subject to robust checks. At a minimum, every provider must complete the Provider Statement, [8.1q Provider Statement](#) unless they already hold the Learning Outside the Classroom Quality Badge.

A Provider Statement or duplicate risk assessments is not required by our competent support from organisations which hold the LOtC Quality Badge. <https://lotcqualitybadge.org.uk/>. However, a risk management plan should be completed to record any aspects of the visit for which the establishment is responsible. E.g. Transport to and from the venue, downtime, medical issues etc.

11. Consent forms

Parents/Carers are asked to provide consent for their child to take part in short visits (within walking distance of school) when they enrol at St John's. For trips that require transport, consent will be sought via the parent/carer communication system for each trip. Residential and high-risk activities have a more detailed consent form confirming emergency contacts and medical details for the duration of the visit.

Consent from a resident parent/carer with parental responsibility will be deemed as consent from everyone with parental responsibility for the pupil, unless we receive prior notice, in writing, from a non-resident parent/carer specifying otherwise.

12. Notification Process

All category C visits/trips including residential visits or those of a high risk or adventurous nature will be notified to Health, Safety & Wellbeing at Bristol City Council.

**COMPLETED FORMS WILL BE RETURNED AT LEAST:**

- **FOUR WEEKS PRIOR TO RESIDENTIAL AND CATEGORY “C” VISITS**
- **AND SIX WEEKS PRIOR TO OVERSEAS VISITS**

We note this enables the necessary checks to be carried out, any amendments made to the arrangements and approval given.

**Failure to notify and receive approval for an activity in Category ‘C’ could result in:**

- insurance cover for all those taking part in an activity being invalidated
- contravening safety guidelines for ‘Off-site visits/School trips’
- lack of emergency support or back-up in the event of an incident occurring
- adverse publicity for the establishment organising the event
- cancellation of the Off-site visit/School trip, and
- potential for litigation, both civil and criminal.

13. “Category of activity”

When assessing the most appropriate **category** in which to place an activity, account must be taken of various factors including:

- the ages and abilities of the children or young people involved
- the environment and site of the activity
- the prevailing or forecasted weather conditions
- the experience and qualifications of visit leader’s supervisory staff, and
- any special needs of children or young people.

**The lists of activities in the various categories below are by no means exhaustive and will be added to or interchanged as experience dictates.**

**If in doubt contact the BCC HS&W team / Delegated services.**

**Category ‘A’** comprises activities/events that present no significant risks beyond those that may be experienced in everyday living and moving around.

For example:

- visiting local libraries, museums, exhibitions, theatres, concerts
- attending musical/arts events, festivals – on same day events
- field study visits in environments presenting no technical hazards
- visits to local Swimming Pools where correct ratios of lifeguards are on duty supported by an appropriate number of school staff
- local farm visits
- zoological gardens, nature reserves and National Trust type properties, and
- access to off-site playing fields, sports facilities, ‘away’ fixtures, local walks, surveys, census gathering exercises.

**Category ‘B’** comprises activities and events that are considered during the **risk assessment** process to be of higher profile than those of Category ‘A’.

For example:

- orienteering in local parks or woodlands
- walking, jogging, cycling (on or off-road), in non-remote countryside
- local low level camping trips where basic facilities are available on site\*\*
- field study work in non-remote upland or coastal areas
- team building/problem solving exercises, low level (up to a height of 1.25 m) rope courses and ‘assault’ course circuits
- visits to major cities in UK, visits to theme parks, and
- sponsored walks & large scale events where many people participate or watch.

**NB \*\* Overnight camping** trips which fall into Category ‘B’ will be notified to the competent persons on the notification form as they constitute a residential experience.

**Category ‘C’** comprises activities/events that are potentially of a high risk nature that require specially trained, experienced and qualified staff to lead. Many of these activities fall within the **4 generic groupings** currently covered by the Adventure Activities Licensing Authority [www.hse.gov.uk/aala/](http://www.hse.gov.uk/aala/), although this may change in due course. These groupings are: climbing, caving, trekking and water-based activities.

For example:

- climbing plus abseiling, ice climbing, gorge walking, ghyll scrambling and sea level traversing
- caving plus mine exploration, cave diving

- trekking plus mountaineering, fell running, pony trekking, off piste skiing, and
- water-based activities: canoeing, kayaking, sailing, windsurfing rafting, paddle surfing, dragon boating

A full list of activities covered by licensing can be found on the AALA web site [www.hse.gov.uk/aala/](http://www.hse.gov.uk/aala/)

**Additional category C activities include:**

- remote or 'wild country' camping (Ten Tors, Duke of Edinburgh's Award expeditions)
- overseas visits & exchanges and overseas expeditions
- motor sports, quad biking, motorbike scrambling
- air-born activities (excluding commercial flights) i.e. gliding, hang/para gliding, parachuting
- hybrid activities combining elements of rock & water i.e. gorge/ghyll scrambling, canyoning, sea traversing, coasteering'
- archery
- combat activities i.e. self-defence, judo, fencing, boxing, wrestling, martial arts
- pistol & rifle shooting & paint balling, and
- fishing: inland waters, coastal & sea venues.

Staff or managers should be certain of the educational benefits for their children and young people of such activities as paint balling, pistol/rifle shooting etc. when undertaking their risk assessment.

14. Supervision and Staffing Ratios

Young People on visits must be adequately supported and supervised at all times. The level of supervision will be based on risk assessment for the specific visit, and will be determined by such factors as:

- The nature and duration of the visit and the planned activities
- The location and environment in which the activity is to take place
- The nature of the group, including the number of young people and their age, level of development, sex, ability and needs (behavioural, medical, emotional and educational)
- Staff competence
- The consequence of a member of staff being indisposed, particularly where they will be the sole leader with a group for any significant time
- The contingency or Plan B options, and
- All adults involved have a responsibility to safeguard and promote the welfare of children and young people during Educational Visits. When any

concerns are identified, these will be raised with the establishment's designated safeguarding lead person. When visits occur out of hours, or out of term time, you will ensure that adequate and appropriate cover arrangements are in place for this role.

The Visit Leader, EVC and Head Teacher/ Manager will make a professional judgement regarding the appropriate level and suitability of staffing for every visit.

15. Down Time

Visit Leaders will ensure that children and young people continue to be properly supervised during 'down time' – before, between and after activities, including lunch periods and the evenings on residential visits and other activities.

16. Remote Supervision

If the aim of visits for young people is to encourage independence and investigative skills, some of the time on visits may be supervised from a distance. The visit leader will establish during the planning stage whether young people are competent in remote supervision situations and will ensure parents/carers have agreed to this part of the visit. The group leader must ensure:

- 1.Children and young people are aware of ground rules and are adequately equipped to be on their own or in a small group.
- 2.Children and young people have telephone number or other suitable means of contacting the visit leader if lost, either by mobile or identified local telephones.
- 3.They have maps, plans and other suitable information for them to act effectively and know how to summon help.
- 4.In enclosed areas, such as theme parks, children and young people will know where and when to meet supervising adults at key locations and set times.

17. Remote Supervision during Adventurous Activities

The training given to young people will be sound and thorough. The instructor will have appropriate qualifications and experience to provide clear guidance for each activity. The visit leader will be satisfied that young people have acquired the necessary skills and have the necessary experience, confidence, physical ability, and judgement to be left without direct supervision. [This applies to all Duke of Edinburgh's Award Expeditions too.]

18. Volunteers

Volunteers must meet the requirements of the roles that they are

assigned (Visit Leader, Activity Leader, Assistant Leader and Helper).

The engagement of any volunteer will involve an appropriate level of vetting and induction. They must be sufficiently competent and confident to carry out their responsibilities. The level of competence and the thoroughness of the engagement process will depend upon the role that the volunteer is assigned, and the degree to which they will be working independently or under supervision.

19. Employees and Volunteers Children Accompanying Visits

Due to the potential conflict of responsibility which could impact on levels of supervision and group safety, where agreements are made to allow staff to bring their own children on a visit, this arrangement will be communicated to the parents/carers of the other young people and identified within the risk assessment.

20. First Aid

The Visit Leader will risk assess the level of first aid required for a particular visit. This decision could be influenced by factors such as the environment and proximity to emergency services or professional care. However, as a minimum, for all visits there will be a responsible adult with a good working knowledge of first aid appropriate to the environment. In the case of the Early Years Foundation Stage pupils, it is mandatory that at least one person in attendance on the visit has a current paediatric first aid certificate.

Where remote supervision is used (for example during a Duke of Edinburgh's Award expedition), the Visit Leader/supervisor will ensure that the group has:

- The ability to contact qualified first aid support, and
- An appropriate level of competence and first aid materials to look after themselves until help arrives.

For Overseas Visits, the Visit Leader will ensure that a member of the visit staff team has an appropriate level of language skills to summon help in an emergency and can communicate effectively in the appropriate language/languages (if travelling through several different countries).

A First Aid Kit appropriate to the visit should be carried.

21. Ticks

We will assess the potential risk of Ticks in our risk management plan and follow up to date guidance found at;

<https://www.gov.uk/government/publications/tick-bite-risks-and-prevention-of-lyme-disease>

22. Allergic Reactions and Anaphylaxis

We will ensure that we are aware of any members of the group (adults and/or children) who are susceptible to an allergic reaction and ensure that we are provided with any details of what can cause them to have a reaction and what should be done to prevent it.

Details of food allergies will be provided to the residential visit provider in advance to ensure suitable meals are available.

We will raise awareness of Natasha’s Law by reading guidance

<https://www.food.gov.uk/business-guidance/prepacked-for-direct-sale-ppds-allergen-labelling-changes-for-schools-colleges-and-nurseries>

We will make sure that all members of the staff visit team read the guidance on the recognition and management of an allergic reaction or anaphylaxis, as well as on the use of adrenaline auto-injectors:

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/645476/Adrenaline auto injectors in schools.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/645476/Adrenaline_auto_injectors_in_schools.pdf)

23. Sepsis

We will refer all visit staff to the OEAP guidance on Sepsis

<https://oeapng.info/downloads/download-info/7-2a-sepsis>

24. Risk Management

The employer has a legal duty to ensure that risks are managed requiring them to be reduced to an “acceptable” level. This requires that suitable and sufficient risk management systems are in place and are proportionate to the risks and should not impose unnecessary bureaucracy. Support, training and resources should be available to all staff involved.

There is a requirement for the risk assessment 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 individuals. Risk assessments should be reviewed regularly.

The risk management of an activity should be informed by the benefits to be gained from participating. DS strongly recommends a “Risk-Benefit Assessment” approach, whereby the starting point for any risk assessment should be a consideration of the targeted benefits and learning outcomes. Where appropriate staff, children and young people should be involved in the process.

Further guidance can be found at 1b Foundations  
[https://oeapng.info/search\\_gcse/?q=1b](https://oeapng.info/search_gcse/?q=1b)

And 4.3c Risk Management – an overview  
[https://oeapng.info/search\\_gcse/?q=4.3c](https://oeapng.info/search_gcse/?q=4.3c)

## 25. Emergency Procedures and Lockdown

We will have emergency planning procedures in place in the event of a critical incident. Every visit leader, deputy visit leader and all other members of the staff team and will be familiar with emergency planning procedures and the reporting mechanism.

Relevant emergency contact telephone numbers will be accessible to leaders at all times during an educational visit but should only be used in the case of a genuine emergency. Under no circumstances will these telephone numbers be given to young people or to their parents/carers.

Postcodes for all venues will be carried by leaders and the staff team.

Where coach travel is to be used, we will brief coach drivers in advance about emergency/evacuation procedures for the trip. E.g. arranging a second pick up point.

We will ensure staff are spread throughout the vehicle for each journey.

We will brief staff about the use of mobile phones on a trip and especially in the case of an emergency.

Refer to 4.3e Safeguarding  
<https://oeapng.info/downloads/download-info/4-3e-safeguarding>

We will have a robust lock down procedure for all residential Educational Visits. Lock down procedures should be seen as a sensible and proportionate response to any external or internal incident which has the potential to pose a threat to the safety of staff and pupils on the trip. Procedures should aim to minimise

disruption to the learning environment whilst ensuring the safety of all pupils and staff. Our procedures will include:

- Identifying the likelihood of a security related incident occurring
- assessing the level of impact, and
- developing plans and procedures to manage and respond to any threats.

Refer to Government advice in School and College Security Guidance (November 2019)

<https://www.gov.uk/government/publications/school-and-college-security>

#### Accident and incident reporting

We will ensure that accident, incidents or near misses are reported without delay, following our Establishment procedures. Any further reporting (e.g. RIDDOR) or incident investigation will follow school procedures.

#### 26. Insurance

We will explicitly check that there is appropriate insurance in place which covers all Educational Visits to be undertaken, including Foreign Travel (where applicable), special activities and volunteer leaders.

#### 27. Data Protection

We will ensure that we have in place suitable systems to protect information held about staff and children/young people and that we comply with current data protection law. This will include how personal data for visits is shared and procedures for handling it.

Deputy visit leaders will have a duplicate copy of all pertinent trip documentation.

Refer to;

The guide to the General Data Protection Regulation

<https://www.gov.uk/government/publications/guide-to-the-general-data-protection-regulation>

OEAP Participant Information and Data Protection

<https://oeapng.info/downloads/download-info/4-3e-safeguarding>

Due regard was taken by carrying out an EqIA to consider the impact on protected groups. However, the impact of the proposal was positive (or at least neutral) for all.	Tick required:  ✓	Date:  28/01/25
--	-------------------------	-----------------------

Other valuable guidance can be accessed at:

<a href="http://www.hse.gov.uk/education">www.hse.gov.uk/education</a>
<a href="#">National Guidance for the Management of Outdoor Learning</a>
<a href="#">Adventurous Activity Licensing Authority (HSE)</a>
<a href="#">Association for Physical Education - safe practice</a>
<a href="#">The Duke of Edinburgh's Award</a>
<a href="#">Council for Learning Outside the Classroom</a>
<a href="#">Institute for Outdoor Learning</a>
<a href="#">RoSPA</a>
<a href="#">Adventuremark</a>

## Appendix 1 (Updated January 2025)

### Trips/off-site visits including sports events:

#### EMERGENCY NUMBERS AND PROCEDURES

When preparing for off-site trips type in your establishment details at the bottom, then copy and laminate this sheet. If going abroad add the local emergency services number and you may wish to translate extra copies of this document into the language of the country you are visiting. Take it with you along with medical and emergency contact details for your Pupil/Children/Young People and staff/volunteers. Copies of this sheet should be made and put on display in all vehicles being used and held by visit leaders and deputy visit leaders who must travel in separate vehicles, if more than one, or at either end of a single vehicle. (Tell the volunteers and children about the form in case it is you who are affected by an incident.)

#### If a critical incident occurs:

- **First, ensure the safety and welfare** of all the members of your party, as far as you can in the circumstances.
- **Second, get Emergency attention.** Call **999 (UK only)** or **112 (EU)**. Call and ask for help from Police, Fire, Ambulance, or Coastguard Services as required.
- **Third, RING the Executive Director, Delegated Services on the emergency only number:**

**+44 07979 - 425 - 989**

He will support you and liaise with your establishment to aid an appropriate response and support. Make sure you tell him your telephone number and location and if the emergency services are on their way.

#### After calling him act as follows:

- **Telephone and tell your Head teacher/EVC on 0117 3534636 or 0117 9030253 (WR) (LRR-0117 3534626)** all relevant details of the incident. They must activate your communication plan and will contact parent/carers as necessary.
- **Write down accurately all relevant facts**, times, witness details, and preserve any vital evidence. If you can; take photographs or video. (Take a note pad or paper)
- **Make contact again with your establishment as** regularly as necessary, informing them of progress dealing with the incident and further information resulting from the incident. (Use e-mail, text etc. if you are certain the receiver is acting on these.)
- **Notify Bristol City Council** (this can be done after the event). Phone the HR advice line on 0117 352 1400 and email [hr.corporatesafety@bristol.gov.uk](mailto:hr.corporatesafety@bristol.gov.uk) to inform them of what has happened and submit any relevant incident reports.

**Please Note** - most members of your party will have mobile phones or similar devices. *Ensure they do not contact anyone by speaking directly to, texting, forwarding photographs or moving images, using social media, etc., until official calls have been made.* This will aid clarity, avoids blocking telephone lines and helps with the response.

Delegated Services	St John's C of E Primary School	
Bill Crocker 07795 190 130 or 01275 795827	LRR 01173532090	WR 0117 9030251
Clevedon Hall Elton Road Clevedon BS21 7RQ	Lower Redland Road Redland Bristol BS6 6SU	Worrall Road Clifton Bristol BS8 2UH

