



# **Policies**

## **Educational Visits and Offsite Activity Policy**

**Next Review – March 2027**



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## **Holmes Chapel Comprehensive School and 6th Form (HCCS)**

### **Educational Visits and Offsite Activity Policy**

#### **1. Introduction**

The Policy and Guidance on Educational Visits and Offsite Activity applies to Holmes Chapel Comprehensive School and 6th Form (HCCS).

Every year thousands of children and young people from schools, Children and Young People's departments and voluntary sectors participate in educational visits and off-site activity as part of their educational experience or personal development. These activities and opportunities are integral to a rounded educational experience which excites, challenges, motivates and stimulates learners. This policy sets out how HCCS will manage this aspect of learning.

#### **2. Definitions**

**Adventure Activities:** Activities that may take place in challenging environments that can present technical or environmental complexity in the organisation or delivery of the activity. Many adventure activities have well established National Governing Bodies that train, assess and validate the competency of staff to lead in the activity.

**Educational Visits:** All visits with a group of young people that leave a school site to journey to another location either during the school day or for extended periods beyond the school day. This usually does not include work experience or activities in schools on split sites. This activity is planned and organised by the school.

**Off-site Activities:** Activities that occur away from the base of regular work with children or young people, organised by staff who work within Children's/Youth Services.

**Learning Outside of the Classroom (LOtC):** An activity that takes place on the school site and further afield. Some of this work falls under the category of educational visits.

**Children and Young People:** All young people under the care of Children's Services whether from a school or setting.

**Staff:** In the context of this policy staff are defined as any employee of the school.

#### **3. Application**

This policy applies to any of the following activities when undertaken by young people under the supervision or control (whether pastoral or direct) of staff.

- Off-site activities, visits, or excursions
- Activities that fall within the remit of Learning Outside the Classroom
- Adventure Activities
- Residential visits

This policy applies whether or not the activities take place within or outside of normal working hours, including weekends and holiday periods. HCCS and LAs have formally adopted Outdoor Education Advisor Panel (OEAP) 'National Guidance' as the source guidance for this policy from the website: [www.oeapng.info](http://www.oeapng.info)

All staff and students must follow the requirements of 'OEAP National Guidance' in addition to the requirements of this policy statement which are highlighted below. (See section 4 Policy statement)

Where there is any variance of policy between the National Guidance and local policy this Policy Statement sets out HCCS's requirements in partnership with Council's requirements which take precedence over any National Guidance.

Where HCCS commissions LOtC activity they must ensure that the provider has either of the following:

- HCCS Guidance or OEAP National Guidance.
- A system in place where standards are no less than those required by OEAP National Guidance. Planning, notification, approval, monitoring, and evaluation of all visits

This is carried out through the Evolve system. Evolve enables HCCS to check, provide guidance, approve (if approval is provided), monitor, evaluate and audit Adventurous, Residential, Standard Overseas and Major Overseas Visits.

All other visits do require approval from the Executive Head Teacher. It is highly recommended that all other visits are entered onto EVOLVE in order to support the planning, processing, monitoring, and evaluating of visits.

<b>Activity</b>	<b>Authorisation Required and Minimum Time Frame</b>
Local Area Visits	Executive Head Teacher
Off-site non adventurous – nonresidential visits	Executive Head Teacher
Residential in UK / Overseas by LOtC Provider	Executive Head Teacher Final submission must be submitted to the Evolve Coordinator 20 working days in advance of activity.
Adventure Activities	Executive Head Teacher Final submission must be submitted to the Evolve Coordinator 20 working days in advance of activity.
Overseas Expeditions and Ski trips other overseas visits not delivered by an LOtC provider	Executive Head Teacher to be involved in the planning stages. Final submission must be submitted to the EVC 30 working days (term time) in advance of activity

#### **4. Policy Statement**

HCCS recognises the important role that educational visits, off-site activities, adventurous activities and Learning Outside the Classroom (LOtC) plays in providing a rich and rewarding education for children and young people irrespective of age, ability, or circumstances.

HCCS actively supports and encourages such activities and recognises that this may involve exposing participants to challenges and risks with which they may not be familiar. HCCS ensures arrangements and procedures are in place to identify and manage these risks against the benefits of the activity. It is HCCS' policy as far as is reasonably practicable that all activities falling within the scope of this policy should:

- Comply with recognised sector best practice guidance with respect to issues falling within the scope of this policy. For the purposes of this policy this signifies compliance with the National guidance issued by the Outdoor Education Advisers Panel ([www.oeapng.info](http://www.oeapng.info)) unless this guidance is specifically overridden by a requirement within this or any other Council Health & Safety Policy.
- Be allocated sufficient resources (time, planning, staff, and budget) to enable activities to be undertaken safely.
- Follow a Risk Management process that is informed by a Risk Benefit Assessment where the benefits of the proposed activity are balanced against the risks. Detail is to be included on how the risks can be managed. There may be some background or residual risk elements remaining and these could be viewed as acceptable. Part of the curriculum and learning for young people is to know how to identify and manage appropriate risk. Where risks to participants are viewed as unacceptable then the activity should not be carried out until further advice has been sought from The Executive Head Teacher.
- Be monitored to satisfy HCCS, that the requirements of this policy are being met.

#### **5. Third Party Providers (Internal and external)**

Where activities that fall within the scope of this policy are being provided by a third party, HCCS will require that:

- Reasonable checks of any external organisations that are contracted to provide any activities, regardless of whether these activities are being undertaken on or off-site, are carried out to ensure that the external organisations are suitably trained, qualified and competent to provide such activities. These checks also need to ensure that the external provider carries a minimum of £10 million public liability cover.
- Checks are made via an external validation process using an Inspection and Accrediting Body which may include the Adventure Activities Licensing Service, the LOtC Quality Badge and Adventure mark or sector Approval schemes. HCCS endorses the LOtC Quality Badge Scheme. Confirmation about individual Awarding Body schemes should be made via the HCCS LOtC Team.
- The performance of external organisations should be adequately monitored whilst engaging in activity to ensure that agreed practices are being met.
- The significant findings of monitoring are acted upon and reported to the Executive Head Teacher and/or Governing Body of the school. Please refer to Section 29 within this Policy and Guidance document.

To secure the policy objectives, HCCS will put arrangements in place to:

- Establish and maintain systems and procedures to enable schools and settings to comply with the requirements of this policy. HCCS will record and manage activities falling within the

scope of this policy using the Evolve online system. The Evolve online system should be used for any off-site activity or onsite residential or adventurous activity.

- Provide advice to enable staff with responsibilities for any aspect of this policy to meet any requirements placed on them.
- Provide written guidance and procedures for staff to enable them to fulfill their responsibilities within the scope of this policy.
- Provide access to suitable and sufficient information and instruction and training for all staff who organise, facilitate, lead, and advise on such activities.
- Comply with reasonable directions and instructions issued by external organisations providing such activities where these are issued in order to secure the health and safety of other persons.
- Establish structures to enable the reporting of any significant findings of monitoring activity (e.g., incident reports) to the Executive Head Teacher.

## **6. Responsibilities:**

### **6.1 Trip Leaders:**

- Maintain their competence and keep abreast of legal requirements and sector and industry best practice with regards to activities covered by this policy.
- Report significant changes to legislation, LA Policy and Guidance, National Guidance and sector and industry best practice to appropriate key stakeholders such as Governing Bodies, Trustees, and Educational Visits Coordinators
- Report the significant findings of monitoring including any recommended corrective actions to the appropriate bodies which may include: Headteachers, Head of Establishments, Governing Bodies, Trustees and Educational Visits Coordinators, HSE.
- Medical and first aid issues are addressed.
- Emergency arrangements include emergency contact access to all relevant records, including medical and next-of-kin information for all members of the party including staff.
- Individual activities and visits are reviewed and evaluated, and this process includes reporting of accidents and incidents, complying with employer requirements and Reporting Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 2013.
- Policies and procedures are reviewed on a regular basis.
- A review should follow any serious incident or system failure. Risk management documentation must be updated if necessary.
- There is an established procedure for recording 'near accidents/near misses, including any resulting learning points and action.
- EVC's are updated.
- Assistant Leaders are competent to carry out the tasks they are assigned.
- Activities and visits are led by competent and confident leaders. The Trip Leader needs to be both accountable and competent to carry out specified roles and responsibilities. Being competent requires that the leader can demonstrate the ability to operate to current standards of recognised good practice, as set out in National Guidance.
- Ensure that a Critical Incident and Emergency Plan is in place and relevant contact details are current.
- Liaise with your establishment's Educational Visits Coordinator (EVC) and ensure that your respective roles are clear.
- Be formally approved to carry out the visits.
- Be specifically competent.

- Plan and prepare for the visit, taking a lead on risk management. It is good practice to involve all staff in the planning and risk management process to ensure wider understanding. It is also good practice to involve young people in these processes wherever appropriate.
- Define the roles and responsibilities of other staff (and young people) to ensure effective supervision, appointing a deputy wherever possible.
- Complete a clear and transparent itinerary and risk benefit assessments.
- Upload the visit onto EVOLVE, after approval by the Executive Head Teacher, within the specified timeframe stated in section 3.
- If the staff team includes someone with a close relationship to a member of the group, ensure there are adequate safeguards so that this will not compromise group management.
- Ensure that child protection issues are addressed (e.g., vetting including DBS checks).
- Provide relevant information to supporting staff, including about the nature and location of the visits and about the participants (including age, health information capabilities, SEND, safeguarding and behavioural issues).
- Ensure that informed parental consent has been obtained as necessary.
- Provide relevant information to parents and young people and arrange pre-visit information meetings where appropriate.
- Make sure there is access to first aid at an appropriate level.
- Ensure the activity/visit is effectively supervised, and duty of care responsibilities are observed. The duty of care cannot be delegated to a third-party provider.
- Ensure that all staff and any third-party providers have access to emergency contact and emergency procedure details.
- Evaluate all aspects of the visits, both during and after the event.
- Report any accidents, incidents, or near-misses to the EVC.

## **6.2 Governing Bodies:**

The Governing Body should satisfy themselves that HCCS has suitable policies and procedures in place to adequately manage and monitor all activities falling within the scope of this policy. The results of monitoring should be discussed at Governing Body and Headteacher Senior Leadership Team meetings.

## **6.3 Executive Head Teacher:**

Additional reading to be read in conjunction with this guidance <https://oeapng.info/head-manager/>

The Executive Headteacher is responsible for ensuring that any activities falling within the scope of this policy are:

- Adequately resourced (in terms of planning, time, staff, and budget) to secure compliance with the requirements of this policy and any associated procedures.
- Led by suitably trained, qualified and competent people.
- Checked comprehensively if external organisations and third-party providers are providing the activity, the Trip Leader/Faculty Head is responsible for ensuring that checks are carried out to ensure as far as reasonably practicable, that suitably trained, qualified and competent people deliver the activities that they have been contracted to provide. These checks also need to ensure that the external provider has appropriate insurance in line with the Local Authority or Governing body requirements. It is the responsibility of third-party providers to carry out suitable and sufficient risk assessments for all Educational Visits and Offsite Activities that they provide for the school. This can be checked by using a provider with an LOtC Quality Badge and AALA (Adventure Activity Licensing Authority) accreditation (if

applicable). If no LOtC Quality Badge is held then a Provider Form may be submitted for approval.

- Covered by suitable and sufficient risk assessments and these are brought to the attention of all staff, including volunteers involved/supporting the activity. These should be checked in relation to risk management systems. Risk management systems are required to be in place using a risk benefit assessment tool to ensure that adequate risk management measures are implemented. For activities provided and delivered by third parties reasonable checks of the provider using the risk management system should be used. The Executive Head Teacher is not responsible for Providers' risk assessments and should not undertake any further risk assessments of Providers' activities.
- Monitor visits and report significant findings to the school's Governing body so they can maintain effective oversight of these activities.

The Executive Headteacher remains responsible for the standard level of compliance that is to be achieved by the EVC.

#### **6.4 Educational Visits Coordinators (EVC) :**

EVCs have a responsibility to ensure that they bring any significant failings relating to compliance with this policy and its associated procedures to the attention of their Executive Trip Leader.

The duties of the EVC are outlined below:

- Understand how Learning Outside the Classroom (LOtC), offsite activities and visits can support a wide range of outcomes for children and young people and raise achievement.
- Attend EVC Training as recommended by DfE.
- Ensure that LOtC, offsite activities and visits meet guidance requirements.
- Ensure that establishment managers, visit leaders, assisting staff and voluntary helpers understand that all staff involved in LOtC, offsite activities and visits require access to training at an appropriate level to ensure that the employer's guidance and establishment procedures are properly understood.
- Ensure that there is an established visit policy.
- Supporting the head/manager with approval and other decisions.
- Monitor Visit Leader planning and sample monitor visits.
- Organise the training of Visit and Assistant Leaders (including volunteers).
- Ensure that where the accompanying staff includes someone with a close relationship to a group member, there are adequate safeguards to ensure that this will not compromise group management.
- Ensure that DBS checks are in place as required.
- Ensure reasonable comprehensive checks of any external organisations that are contracted to provide any activities, " regardless of whether these activities are being undertaken on or off-site", are carried out to ensure that the external organisations are suitably trained, qualified and competent to provide such activities. These checks also need to ensure that the external provider carries the required insurance, recommended by the Local Authority or Governing body.
- Check that there are two 24/7 emergency contacts with the base for each visit and that emergency arrangements are in place.

#### **6.5 The duties of the parent/adult volunteer:**

[www.oeapng.info/parents/](http://www.oeapng.info/parents/)



- Understand the role, responsibilities, and limitations that you have been assigned and how these fit with other staff including the Visit Leader and be competent and confident in the role and responsibilities that you have been assigned.
- Know about establishment and employer policies and procedures as far as they affect the responsibilities you have been assigned, and work within these.
- Ensure that you have been briefed about the nature and location of the visit and about the participants (including age, health information, capabilities, SEND, safeguarding, and behavioural issues).
- Report any concerns you have during the visit to the Trip Leaders as soon as possible.
- Be prepared to contribute to the evaluation of all aspects of the visit, both during and after the event.
- Be familiar with <https://oeapng.info/parents/>

## 6.6 Staff

Staff are responsible for taking care of themselves and for others affected by their actions or their omissions. In the context of this policy this significance is outlined below:

- Co-operate with line managers and supervisors by implementing the agreed actions of any risk management process and planning when they undertake or are involved in activities falling within the scope of this policy.
- Report any failings in the risk management process relating to activities falling within the scope of this policy to the attention of management.
- It is an expectation of this Policy that all HCCS staff have been formally assessed as competent to undertake such responsibilities as have been assigned to them.

## 7. Staff training and competency

It is HCCS policy that all EVCs, Visit Leaders and Assistant Leaders have been assessed as competent to undertake their role. Staff competencies and certificates must be uploaded onto EVOLVE.

Role	Mandatory Training	Recommended Training
EVC	Attend full initial training Attend update training every 3 years	
Visit leaders	Visit Leader training/experience- in house	
Activity leader	On all trips, at least one member of staff should hold a relevant First aid certificate and be signed off as competent to lead for specific activity by HCCS	
Local Trip leader	Suitably trained, confident and competent person to carry out first aid within the environment of that activity. Certified First Aid Qualification	

Ski Course Leader	Hold a current Snow Course Leader or Alpine ski course leader award.	
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## 8. Emergency Planning, Critical Incident Support, and Incident Reporting

A critical incident may include an incident where any member of a group or individual 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.

Schools should follow their school emergency plan and should always have this documentation during all Educational Visits and Offsite Activities.

### 8.1 Incidents and Near Misses.

All health and safety related incidents, including any 'near misses,' arising from activities covered by this policy must be reported to the EVC.

## 9. Monitoring and Review

The effectiveness of this policy will be monitored and reviewed in accordance with your Employer's Health and Safety Policy.

## 10. Key Policies

Image Use Policy

Health and Safety Policy

## 11. Approval of staff to lead an adventurous activity

The Trip leader should complete the Visit Form on EVOLVE as usual. During this process EVOLVE will ask for an Activity Leader Form (ALF) to be completed, which will request further details regarding the proposed venture (e.g., dates, venues, numbers, etc.), along with leader information outlining qualifications and historic and current experience. The ALF will then be embedded within the Visit Form for that visit.

Where approval is not granted by the LA to lead the activity, the Visit Form will be returned to the EVC via EVOLVE, with an attached note. In this scenario the activity can be approved by the Executive Head Teacher.

For visits beyond the local environment there must be a suitably trained, confident and competent person to carry out First Aid within the environment of that activity. This would usually mean a certified First Aid Qualification.

## 12. Hotel, overseas swimming pools and open water swimming

Trip Leaders must liaise with the Executive Head Teacher before any visit is planned for hotel (and other) swimming pools. 8 weeks notice must be given to Evolve via the EVC.

Trip leaders must check lifeguard qualifications. It is strongly advised that all swimming, both structured and unstructured, is placed onto EVOLVE, however curriculum swimming does not require Evolve approval. School staff must be aware of a child's swimming ability before they commence activity.

### **13. Walking in open country**

The following minimum levels of technical competence apply where a member of the Establishment's own staff intends to lead an open-country activity:

- a) For walking groups outside the UK or Ireland please contact Evolve for further guidance.
- b) For leaders of walking groups in mountainous terrain within the UK and Ireland (600m or above):
  - Mountain Leader Award (Summer or Winter as appropriate)
  - A written statement of competence by an appropriate technical adviser
- c) For leaders of walking groups in summer conditions in non-mountainous hilly terrain  
Known variously as upland, moor, bog, hill, fell or down, with well-defined obvious boundaries such as roads and coastlines. (Where any hazards within it are identifiable and avoidable and where wild camping or movement on steep ground is not involved.)
  - MLTB Hill and Moorland Leader along with the Expedition module if camping is involved, as well as relevant first aid qualification
  - A written statement of competence by an appropriate technical adviser
- d) For leaders of walking groups in terrain easier than those defined in section c)  
The leader must demonstrate an appropriate level of competence. Completion of a suitable Leader Training Course – sanctioned by HCCS, which may include:
  - Lowland Leader award.
  - Countryside Leader Award.
  - Sports Leaders UK Level 2 Award in Basic Expedition Leadership (BEL).
  - Evidence of recent and relevant experience which has been appropriately corroborated.An assessment of competence (written or implied) by the Executive Head teacher.

### **14. Snowsports**

Young people may only participate in snowsports when under the direction of an appropriately qualified and competent person. This would normally be an instructor employed by the local snowsports school.

A member of staff intending to lead skiing or snowboarding (i.e., not using a snowsports school instructor) must be qualified as below and have been approved by HCCS:

- a) Skiing: The minimum qualification to lead skiing on snow is:
  - The Alpine Ski Course Leader Award (ASCL) [www.snowsportengland.org.uk](http://www.snowsportengland.org.uk) or
  - The Alpine Ski Leader Award (ASL) [www.snowsportscotland.org](http://www.snowsportscotland.org) or
  - BASI Level 2 Ski Instructor [www.basi.org.uk](http://www.basi.org.uk)
  - A statement of competence by an appropriate 'technical adviser'
- b) Snowboarding: The minimum qualification to lead snowboarding on snow is:
  - The Snowboard Leader Award (SBL) administered [www.snowsportscotland.org](http://www.snowsportscotland.org) or
  - BASI Level 2 Snowboard Instructor [www.basi.org.uk](http://www.basi.org.uk)
  - A statement of competence by an appropriate 'technical adviser'

Pupils may only take part in off-piste activities if:

- The pupils are under the direction of a suitably qualified local instructor
- They remain within the designated controlled areas
- There is insurance in place that covers them to do so

## **15. Private Cars**

Where a private (staff or parent) car is to be used to transport young people then this must be approved by the Executive Head Teacher.



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CHECKLIST		
Key SLT Leader (EVC only to complete)		
School Calendar Checked?		
Online payment set up required?		
Cover required?		
Trip/Visit agreed by Faculty Head		
First Aid provision considered		

CIRCULATION
<p>Following approval by the Faculty Head this form must be circulated by the Trip/Visit Leader to Faculty Heads (<a href="mailto:facultyheads@hccs.info">facultyheads@hccs.info</a>), the Educational Visits Coordinator (EVC) (<a href="mailto:Helen.Cliff@hccs.info">Helen.Cliff@hccs.info</a>), Attendance (<a href="mailto:Attendance@hccs.info">Attendance@hccs.info</a>), the Finance team (<a href="mailto:Financeteam@hccs.info">Financeteam@hccs.info</a>), the Catering Team (<a href="mailto:Sodexo@hccs.info">Sodexo@hccs.info</a>), Faculty ESO</p>

APPROVAL		
	Signature	Date
Head Teacher		

## Appendix B

### CHECKLIST - Trips

Contact: \_\_\_\_\_

Department: \_\_\_\_\_

#### Details

- Venue
- Contact Details
- Date
- Times
- Tickets
- Transport
- Number of students
- Year groups/class
- Number of staff/details
- Calendar check for conflicting events
- Trip agreed by curriculum leader
- Initial trip request form sent to Evolve Coordinator, for auth by Nigel Bielby
- Member of SLT alerted and assigned - NBI / MLO / THA
- Electronic Initial Notification form completed and submitted to
- Added to school calendar
- Added to 'Visits and trips' section of school website

#### Tickets

- Order by phone/online
- Confirmation of booking
- Payment/invoice date
- School fund immediate payment form (physical signature)
- Invoice received
- Invoice approval by budget holder

#### Transport

- Special transport requirements
- Quotes for transport
- School Fund PO (physical signature)
- Approval by trip leader
- Confirmation of booking
- Invoice received
- Invoice approval by Trip Leader

#### Funding

- Standard/subsidized trip
- Sub Transfer request to departmental budget holder (email Internal Journal)
- Standard cost to students
- Cost for PP Students (contact PP Coord/ Helena Connolly before letters to parents)
- Cost for Bursary Students (contact Sixth Form Manager/Director to approve)
- Transfer request to PP Coord (email Internal Journal)
- Bursary request to Director of Sixth Form, cc Manager
- Funding summary to Finance Team

## Letters

- Draft standard and/or PP letter(s)
- Agree with teacher
- Email letter to Finance, with student list (incl PP/Bursary)
- Await confirmation of set up online
- Medical & Conduct Form
- Photocopy in class groups for teachers to hand out
- Send out to parents via Bromcom (PDF copy only) - standard & PP

## Payments

- Set up payments sheet for attendees (Include prepaid PP/Bursary)
- Share with relevant teaching staff
- Check payments & update on regular basis
- Close account with Finance

## Evolve

- Teacher to initiate Evolve
- Add
  - Letter, Evolve medical & conduct, Risk Assessment, Itinerary
  - Student names
  - Register (with contact details)
  - NOK staff
  - Additional risks considered - terrorism/Covid
- Provide other trip details to staff to upload
- Evolve Coordinator approval
- Evolve Lead final approval

## Trip

- Trip Folder to Trip Leader:
  - Evolve forms
  - Transport details
  - Tickets
- First Aid box to Trip Leader
- Confidential Waste

## Attendance/Restaurant

- Let attendance know which students are going on your trip a week before the trip is due to take place.
- Let Sodexo know how many students are going on the trip a week before the trip takes place.

## Shared Drive/School Trips/Current Educational Visit/Trip Documentation

- Itinerary
- Staff Next of Kin details
- Student register & contact details

## Update ESO TO DO list



**Approved by: Board of Governors**

**Next review due by: March 2027**