

# Lyndon School, Summit Learning Trust

## Guidance for the Management of Educational Visits

### 1. Provision of Employer Guidance

**Lyndon School** has formally adopted “**National Guidance**”(NG) as “**Lyndon School Guidance**”. This Educational visits guidance can be found on the following web site: [www.oeapng.info](http://www.oeapng.info). It is a legal expectation that employees **must** work within the requirements their employer’s guidance; therefore **Lyndon School** employees must follow the requirements of National Guidance, as well as the requirements of this Guidance.

**Lyndon School** employees should also follow NG recommendations. As a minimum employees planning trips must read the documents headed ‘Must Read’ at this web address: <https://oeapng.info/downloads/good-practice/> .

Where a **Lyndon School** employee commissions activity, they must ensure that such commissioned agent has systems and procedures in place where the standards are not less than those required by National Guidance.

### 2. Scope and Remit

The NG document **Basic Essentials Folder – “Status, Remit and Rationale (1c)”** 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 LOtC;
- 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: “**Underpinning Legal Framework (3.2a)**”

This Guidance relates to the following Lyndon policies (Health and Safety Policy, Employment, Insurance)

### 3. Ensuring Understanding of Basic Requirements

As an employer, **Lyndon School** is required to ensure that its employees are provided with

- appropriate guidance relating to visits and 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 outdoor learning and LOtC in **Lyndon School** is the National Guidance web site: [www.oeapng.info](http://www.oeapng.info)

The relevant training courses for **Lyndon School** are:

1. Educational Visit Coordinator (EVC) Training - **Lyndon School** establishment is required to have a current, trained EVC in post.
2. Educational Visit Coordinator (EVC) Refresher Training

For the purposes of day-to-day updating of information, **Lyndon School** EVC and Visit/Activity Leaders are directed to the posting of "*Latest News*" from SMBC on Evolve located on the front screen. .

Where an employee experiences problems with finding the material they are looking for, or require clarification or further help and guidance, they should contact their Educational Visits Coordinator (EVC), or the **Outdoor Education Adviser**. The Outdoor Education Adviser for the Academy is provided by the SMBC Health and Safety Support Team.

Contact Details: [corporategovernance@solihull.gov.uk](mailto:corporategovernance@solihull.gov.uk)  
Office phone: 0121 704 8318

#### 4. Approval and Notification of Activities and Visits

The Employer Policy **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.

Lyndon School uses an online system for notification and approval called Evolve. It is a requirement that Lyndon School use the Evolve system; for further advice and help using the system, the establishment should contact the nominated adviser (see section 3)

**Approval Route:** All visits are the responsibility for the Academy to approve. This runs in the current process via Evolve.

#### 5. Risk Management

As an employer, **Lyndon School** 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 **Lyndon School** 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. **Lyndon School** 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. 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 or **Lyndon School** 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. SMBC have provided generic risk assessments and a template on the Evolve system and strongly recommend that this format is adopted. Refer to NG document: ***“Risk Management”***

## **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, **Lyndon School** is committed to providing emergency procedures to support staff in the event of a critical incident.

Refer to NG document: ***“Critical Incident Management for Visits”***

**To activate support from Lyndon School, the following telephone numbers should be used:**

**Normal office hours: 0121 743 3402**

**Outside normal office hours: 07903 709590**

These numbers should be carried by leaders at all times during an off-site activity but should only be used in the case of a genuine emergency. Under no circumstances should these numbers be given to young people or to their parents/guardians.

On all trips, staff should confirm communication arrangements prior to departure, informing parents and carers of this (if a residential trip). Lyndon School expects staff to use their professional judgement as regards dealing with incidents, and to take reasonable actions, contacting the Principal if unsure.

## **7. Monitoring**

As an employer, **Lyndon School** ensures that there is sample monitoring of the visits and LOtC activities undertaken by its staff. Such monitoring should be in keeping with the recommendations of National Guidance. There is a clear expectation that the monitoring function is a delegated task, principally carried out through systems put in place by the EVC.

Refer to NG document: ***“Monitoring”***

## **8. Assessment of Leader Competence**

National Guidance provides clear advice regarding the assessment of leader competence. It is an expectation of **Lyndon School** that all leaders and assistants have been formally assessed as competent to undertake such responsibilities as they have been assigned in line with the NG guidance. Staff should maintain their training and qualifications on their own profile within Evolve.

Refer to NG document: ***“Assessment of Competence”***

## **9. Role-specific Requirements and Recommendations**

National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found within **Lyndon School** management structures. These are:

**Local Governing Body  
Principal  
EVC**

Refer to individual NG documents headed as above.

National Guidance sets out clear and detailed responsibilities and functions of specific roles that relate to roles to be found the establishment. These are:

1. Member of Local Governing Body
2. Principal
3. EVC
4. Visit or Activity Leader
5. Assistant Visit leader
6. Volunteer Adult Helper
7. Parents

Refer to individual NG documents headed as above.

## **10. Charges for Off-site Activities and Visits**

**Lyndon School** Heads/Managers, Curriculum Planners, EVCs and Visit/Activity Leaders must take account of the legal framework relating to charging, voluntary contributions and remissions as set out in sections 449 to 462 of the Education Act 1996.

Refer to NG document: ***Charges for Off-site Activities and Visits in an Educational Establishment***

## **11. Vetting and DBS Checks**

**Lyndon School** employees who work *frequently* or *intensively* with, or have *regular access* to young people or vulnerable adults, must undergo an enhanced DBS clearance with barred list 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 3 days or more in a month or overnight.

However, it must be clearly understood that a DBS 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: ***"Vetting and DBS 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 etc);
- 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

Refer to NG document: ***“Ratios and Effective Supervision”***

Refer to NG document: ***“Group management and Supervision”***

### **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 a vital dimension of risk management.

Wherever reasonably practicable, it is good practice to carry out a preliminary visit. This Guidance clarifies the circumstances where a preliminary visit is a requirement.

1. Pre visits are required for visits where there is a high complexity factor and the visit has not happened previously, or when the visit is solely led by academy staff.
2. Residentials, visits abroad, exchange visits, or adventure activity 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
- AALS licensing
- Adventuremark
- The Association of Heads of Outdoor Education Centres (Gold Badge)

**Lyndon School** 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 ***“Preliminary Visits and provider Assurances***

### **14. Insurance for Off-site Activities and Visits**

Employer’s Liability Insurance is a statutory requirement and **Lyndon School** holds a policy that indemnifies it against all claims for compensation for bodily injury suffered by any person employed by it. This cover should extend to those persons who are acting in a voluntary capacity as assistant supervisors. **Lyndon School** also holds Public Liability insurance, indemnifying it 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, property. 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. The indemnity covers activities such as off-site activities and visits organised by staff for which the employer is responsible.

Some level of Personal Accident Insurance is provided for all **Lyndon School** employees in the course of their employment, providing predetermined benefits in the event of an accident. However, Visit/

Activity Leaders should be advised that they should consider taking out less limited personal accident cover privately, or obtain cover through a professional association.

**Lyndon School** should contact the Insurers to seek clarification of the above, including any circumstances requiring early notification of specialist activities to the insurer. They should also ensure they have obtained current information regarding any special policies that may be available to offer more comprehensive cover.

Refer to NG document: ***“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.

**Lyndon School** takes all *reasonably practicable* measures to include all young people. The principles of inclusion should be promoted and addressed for all visits and LOtC 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 Equality Act 2010, (previously 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: ***“Inclusion as a Legal Issue”***

## 16. Good Practice Requirements

To be deemed competent, a **Lyndon School** Visit / Activity Leader, or Assistant Leader must be able to demonstrate the ability to operate to the current standards of recognized good practice for that role. All staff and helpers must be competent to carry out their defined roles and responsibilities.

National Guidance sets a clear standard to which **Lyndon School** 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 EVC 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 **"Good Practice Basics"**

## 17. 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 and establishments **must** follow the specialist guidance provided in **Lyndon School** transport policy. All national and local regulatory requirements **must** be followed.

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.

The Visit Leader should ensure that coaches and buses are hired from a reputable company. Transporting young people in private cars requires careful consideration. Where this occurs, there should be recorded procedures.

Refer to NG document: **"Transport: General Considerations"**

Refer to NG document: **"Transport in Minibuses"**

Refer to NG document: **"Transport in Private Cars"**

**Refer to the Summit Learning Trust Minibus Driving Policy**

## 18. Planning

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

- The plan is based on establishment procedures and national 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 rigour (an Ofsted expectation), 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.

To reduce bureaucracy and encourage activity, the need for formal consent must be considered. When an activity is part of a planned curriculum in normal curriculum time and no parental contributions are requested, then a formal consent is not necessary. However, in the interests of good relations between the establishment and the home, it is good practice to ensure that those in a position of parental responsibility need to be fully informed.

This supports the move towards developing establishment activity-specific policies 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.

- **S**taffing requirements – trained? experienced? competent? ratios?
- **A**ctivity characteristics – specialist? insurance issues? licensable?
- **G**roup characteristics – prior experience? ability? behaviour? special and medical needs?
- **E**nvironmental conditions – like last time? impact of weather? water levels?
- **D**istance from support mechanisms in place at the home base – transport? residential?

Refer to NG document: “***Planning Basics***”